

Broad Indices	Oct 1	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	71910	-0.79	-6.52	-11.20	19.09
Nifty 50	22422	-0.88	-6.60	-9.72	19.19
BSE Mid cap	45344	-1.12	-4.56	0.04	NA
Nifty Midcap 100	58732	-1.01	-1.32	2.98	27.70

Sectoral Indices	Oct 1	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56364	-3.09	-4.84	-5.58
BSE Bankex	61356	-0.60	-6.27	-1.68
BSE CD	57809	-1.35	-3.69	-0.30
BSE CG	74133	0.00	-8.65	7.82
BSE FMCG	16651	-1.51	-10.02	-17.77
BSE Healthcare	49900	-0.29	1.59	14.54
BSE IT	27199	1.80	7.85	-18.72
BSE Metal	39634	-2.18	-0.54	18.56
BSE Oil & Gas	24622	-1.10	-5.60	-8.63
BSE Power	7145	-0.50	-11.59	5.63
BSE Realty	6554	-1.13	-2.23	-3.83

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Infosys	4.11	Bajaj Auto	-7.62
HDFC Life	2.49	Maruti	-4.86
HDFC Bank	1.76	Shriram Fin	-3.84
SBI Life	1.49	Tata Steel	-3.42
Max Health	1.20	Adani Ports	-3.36

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 30	MF Inv Sep 21	DII Inv Oct 1
Buy	18006	10087	25420
Sell	27237	8900	15378
Net	-9232	1187	10042
Net (YTD)	-267271	398622	642024

Policy rates	Oct 1	1W Ago	M Ago	3M Ago
Repo (%)	5.25	5.25	5.25	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00
Overnight rates	Oct 1	1W Ago	M Ago	3M Ago
Call (%)	5.20	5.25	4.75	4.60
10 Yr Gilt(%)^	7.20	7.11	6.96	6.75
TREP (%)	5.04	5.00	4.50	5.25
Short-term debt	Oct 1	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.00	6.85	6.90	6.55
6-month CPs (%)	7.60	7.25	7.25	7.10
3-month CDs (%)	6.10	6.10	6.30	6.10
6-month CDs (%)	7.16	6.80	6.70	6.67
182-day T-bill (%)^	5.94	5.85	5.63	5.44
364-day T-bill (%)^	6.11	6.07	5.81	5.61
Long-term debt	Oct 1	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.74	6.53	6.34	6.17
5-Y G-sec (%)	7.03	6.98	6.68	6.42
10-Y G-sec (%)	7.20	7.11	6.96	6.75

^Weighted average yield

Indian Equity

- Indian equities ended lower on Thursday as persistent foreign fund outflows, rising global bond yields and inflation concerns led to broad-based selling.
- The top losers were Bajaj Auto, Maruti Suzuki, Shriram Finance, Tata Steel and Adani Ports, falling 3.36-7.62%.
- The top gainers were Infosys, HDFC Life, HDFC Bank, SBI Life, and Max Healthcare, rising 1.20-4.11%.

Indian Debt

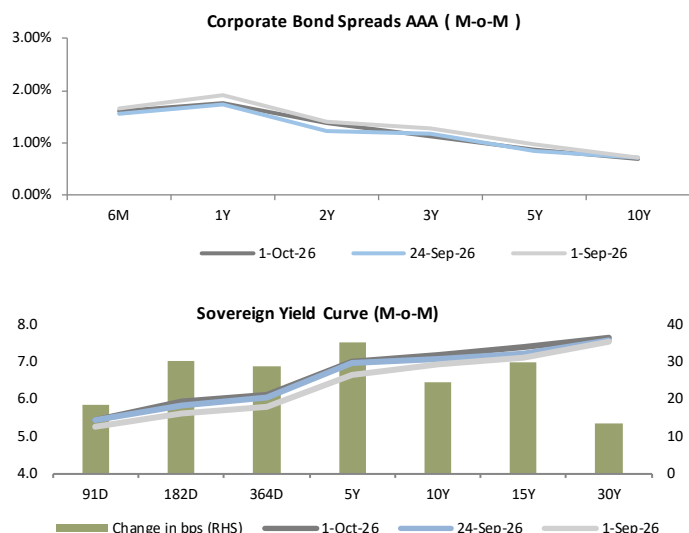
- The interbank call-money rate ended higher at 5.20% on Thursday compared to 4.85% on Wednesday.
- Government bond prices ended lower on Thursday as rising global bond yields and mounting inflation concerns reinforced expectations of an RBI rate hike next week, while concerns over additional debt supply and liquidity absorption measures further weighed on sentiment.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.21% on Thursday compared to 7.19% on Wednesday.

Economy and Government

- India's gross GST revenue rose 14.7% YoY to Rs 2.04 lakh crore in September 2026, compared with Rs 1.77 lakh crore in September 2025, supported by strong economic activity, robust domestic consumption, and improved tax compliance.
- India's HSBC Manufacturing PMI rose to 55.1 in September 2026 compared to 52.8 in August 2026.
- RBI data showed, India's foreign exchange reserves fell by \$18.343 billion to \$747.56 billion during the week ended September 25 compared to \$765.90 in the previous week.
- The government has retained the Public Provident Fund (PPF) interest rate at 7.1% for the October-December 2026 quarter, extending the existing rate for another three months.
- The Maharashtra Government tightened cooperative housing society redevelopment norms by mandating a minimum of three developer bids, requiring 51%-member approval, introducing stricter transparency measures, and setting a two-year project completion timeline.
- The Haryana Government approved a Rs 1,662 crore civil works package for Phase 2 of the Gurugram Metro project, advancing the 15.3-km corridor to improve connectivity across key commercial and residential areas.
- The Indian Institute of Creative Technologies (IICT) signed five MoUs with industry partners across media, esports, technology, and venture funding to strengthen India's AVGC-XR (Animation, Visual Effects, Gaming, Comics and Extended Reality) ecosystem.
- Union Textiles Minister Giriraj Singh said the Union government is likely to introduce several schemes amid global market uncertainties, including a capital subsidy program for technological upgrades across the textile-sector value chain.
- SEBI plans to make investor awareness messages mandatory on broker websites and trading applications to strengthen investor education and risk awareness.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.16	7.77	8.49	8.57	9.80
3-Yr	6.74	7.98	8.70	8.78	10.01
5-Yr	7.03	8.01	8.83	8.91	10.14
10-Yr	7.20	8.03	8.85	8.93	10.16

* Weighted average yields



Global Indices	Oct 2	1D % Chg	3M % Chg	1Y % Chg
DJIA	51177	0.49	-3.26	10.01
Nasdaq	27191	1.19	5.26	19.03
FTSE 100	10462	0.32	-1.79	10.97
DAX	25231	1.17	-1.37	3.31
Nikkei 225	68309	-0.94	-0.62	52.01
Hang Seng	23972	-2.60	3.98	-12.15
KOSPI	7004	0.46	-8.42	97.33

Global 10 yr Sov. Yields (%)	Oct 2	1D Ago	3M Ago	1Y Ago
US	5.28	5.24	4.49	4.10
UK	5.37	5.39	4.79	4.69
German	3.45	3.52	2.90	2.70
Japan	3.10	3.09	2.78	1.66

Commodity Prices	Oct 1	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)*	102.25	102.31	71.8	64.11
NYMEX Crude Oil (\$/bbl)*	91.11	92.87	68.69	60.48
Gold (Rs / 10 gm)#	148138	147888	141632	117332

ibjarares spot prices *Date as of Oct 2

Currencies Vs INR	Oct 1	1D Ago	M Ago	3M Ago
USD	95.99	95.98	94.87	94.73
GBP	127.22	127.19	128.43	125.42
Euro	108.62	108.94	110.07	108.03
100 Yen	60.67	61.16	59.31	58.22
Forex Reserve (\$ bn)*	747.56	765.90	729.33	672.59

* Data pertains to Sep 25 and Sep 18 respectively Source: CRISIL

Key Macro Indicators	
CPI	4.82% (Aug'-2026)
WPI	9.92% (Aug'-2026)
IIP	6.70% (Jul' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

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Capital Market

- Securities and Exchange Board of India (SEBI) has cleared IPO papers for Carlsberg India, Matangi Rubber, Ujin Pharma and TMC Transformer, expanding India's IPO pipeline.
- SEBI granted a no-objection certificate (NOC) to National Stock Exchange of India (NSE) for the launch of corporate bond index futures, subject to necessary regulatory approvals, facilitating the development of India's bond derivatives market.
- Anarock Property Consultants has filed a draft red herring prospectus for a Rs 1,000 crore initial public offering.

Global Equity

- Wall Street stocks closed higher on Friday as weaker than expected non-farm payrolls data for September eased concerns of an imminent Federal Reserve hike.
- US 10yr yield ended higher at 5.28% due to concerns about stubborn inflation.
- FTSE index closed higher on Friday, driven by a decline in oil prices.
- Asian markets were trading higher at 8.30 AM.

International

- The US Nonfarm payrolls for September stood at 29,000 compared to downwardly revised 133,000 (from 162,000 earlier) in August.
- The US unemployment rate rose to 4.2% in September 2026, up from 4.1% in August.
- US Initial jobless claims declined by 1,000 to 197,000 in the week ended September 26. The figure was below expectations of 200,000 and lower than the revised previous reading of 198,000.
- US S&P Global Manufacturing PMI fell to 55.9 in September 2026 compared to 53.9 in August 2026.
- US ISM Manufacturing PMI edged down to 54.5 in September 2026 compared to 54.6 in August 2026.
- US Federal Reserve Bank's balance sheet decreased to \$6743031 million in October 1 from \$6747704 million in the previous week.
- Eurozone S&P Global Manufacturing PMI rose to 52.9 in September compared to 52.7 in August 2026.
- Eurozone's seasonally adjusted unemployment rate was 6.4% in August 2026, unchanged since February.
- Eurozone annual inflation accelerated to 3.8% in September 2026, up from 3.2% in August while core inflation rate accelerated to 2.5% from 2.4%.

Upcoming market indicators

- US S&P Global Composite/Services PMI Final, Sep (Oct 05)
- Eurozone S&P Global Composite/Services PMI Final, Sep (Oct 05)
- US Balance of Trade, Aug (Oct 06)
- Eurozone S&P Global Construction PMI, Sep (Oct 06)
- US Consumer Inflation Expectations, Sep (Oct 07)
- Japan Coincident Index Prel, Aug (Oct 07)
- Eurozone ECB Monetary Policy Meeting Accounts (Oct 08)
- Japan Current Account, Aug (Oct 08)
- India Inflation Rate, Sep (Oct 12)
- Japan PPI, Sep (Oct 13)
- US Inflation Rate, Sep (Oct 14)
- US CPI, Sep (Oct 14)