

Broad Indices	Oct 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	72382	0.66	-6.92	-10.87	19.22
Nifty 50	22556	0.60	-7.07	-9.39	19.30
BSE Mid cap	45485	0.31	-4.94	-0.42	NA
Nifty Midcap 100	59124	0.67	-0.66	2.82	27.88

Sectoral Indices	Oct 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56551	0.33	-5.38	-5.29
BSE Bankex	61789	0.70	-5.59	-1.52
BSE CD	58286	0.82	-3.98	-0.62
BSE CG	74417	0.38	-5.49	7.14
BSE FMCG	16893	1.45	-9.32	-16.78
BSE Healthcare	49335	-1.13	-1.50	13.35
BSE IT	27134	-0.24	1.51	-19.12
BSE Metal	39677	0.11	-2.15	16.53
BSE Oil & Gas	24636	0.06	-5.97	-9.07
BSE Power	7183	0.53	-8.36	5.50
BSE Realty	6560	0.09	-5.63	-3.66

Nifty			
Top Out performers	% Change	Top Under performers	% Change
ITC	5.08	HCL Tech	-3.31
BSE	4.39	Max Health	-2.55
Tata Motors	3.31	HDFC Bank	-2.27
Shriram Finance	2.79	Apollo Hospitals	-1.83
Bajaj Finance	2.29	Asian Paints	-1.70

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 1	MF Inv Sep 21	DII Inv Oct 5
Buy	13148	10087	20493
Sell	22429	8900	15311
Net	-9282	1187	5182
Net (YTD)	-276552	398622	647206

Policy rates	Oct 5	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 5	1W Ago	M Ago	3M Ago
Call (%)	4.80	4.99	5.00	5.28
10 Yr Gilt(%)^	7.21	7.19	6.96	6.71
TREP (%)	5.00	4.70	3.48	5.10
Short-term debt	Oct 5	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.25	7.17	6.65	6.65
6-month CPs (%)	7.60	7.35	6.98	7.03
3-month CDs (%)	6.50	6.25	5.80	6.21
6-month CDs (%)	7.16	6.85	6.43	6.69
182-day T-bill (%)^	5.94	5.85	5.60	5.46
364-day T-bill (%)^	6.12	6.07	5.88	5.62
Long-term debt	Oct 5	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.75	6.67	6.27	6.18
5-Y G-sec (%)	7.07	7.06	6.63	6.41
10-Y G-sec (%)	7.21	7.19	6.96	6.71

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Monday, buoyed by easing crude oil prices, gains in financial stocks following upbeat second-quarter business updates, and easing fears of a Federal Reserve rate hike after softer-than-expected US jobs data.
- The top gainers were ITC, BSE, Tata Motors Passenger Vehicles, Shriram Finance and Bajaj Finance, up 2.29-5.08%.
- The top losers were HCL Technologies, Max Healthcare Institute, HDFC Bank, Apollo Hospitals Enterprise and Asian Paints, down 1.70-3.31%.

Indian Debt

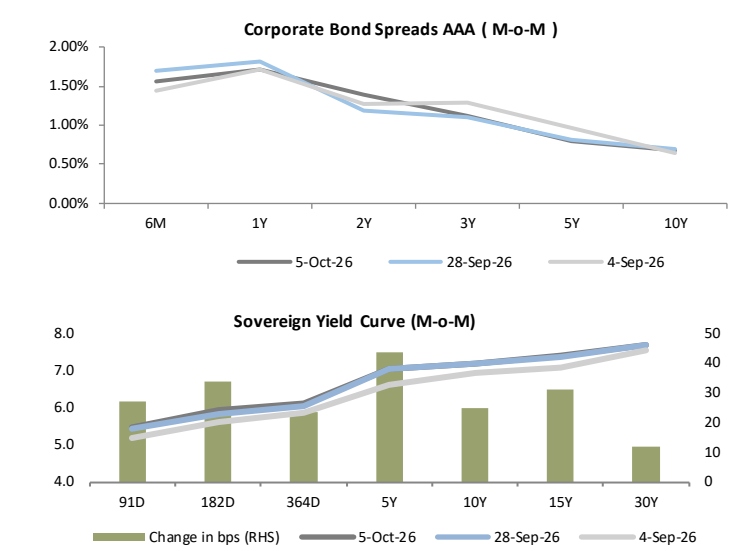
- The interbank call-money rate ended lower at 4.80% on Monday compared to 5.20% on Thursday.
- Government bond prices ended flat on Monday as investors remained cautious ahead of the RBI's policy decision and heavy domestic debt supply capped gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 7.21% on Monday.

Economy and Government

- Finance Minister Nirmala Sitharaman said the Cabinet is expected to soon approve a new Bilateral Investment Treaty (BIT) framework, aimed at providing stronger investor protection and supporting foreign investment inflows.
- Finance Minister Nirmala Sitharaman said India-US trade negotiations have reached a plateau, indicating that making further concessions has become difficult for both sides as talks move toward a final stage.
- Principal Secretary to the Prime Minister Shaktikanta Das said the government is boosting domestic rare-earth magnet production to strengthen manufacturing supply chains and reduce reliance on China.
- The Ministry of Labour & Employment increased the Variable Dearness Allowance (VDA) with effect from October 1, raising minimum wages for workers across sectors in line with inflation.
- The GST Council is considering a proposal that would allow businesses to apply for GST registrations in multiple states through a single application, simplifying compliance and reducing approval timelines.
- UIDAI revised Aadhaar name-change rules, easing routine updates while requiring Gazette notification for major name changes.
- The RBI fixed the coupon rate on its Floating Rate Savings Bond at 6.45% for the next six months.
- The RBI absorbed Rs 2,10,192 crore from the banking system through two overnight variable-rate reverse repo (VRRR) auctions amid surplus liquidity conditions.
- SEBI Chairman Tuhin Kanta Pandey launched a nationwide investor awareness campaign running through March 2027, aimed at promoting financial literacy and cautioning investors against anonymous tips, unregulated finfluencers, and unrealistic return promises.
- SEBI is considering partial changes to recently introduced derivatives settlement rules following feedback from market participants.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.13	7.74	8.46	8.54	9.77
3-Yr	6.75	7.98	8.70	8.78	10.01
5-Yr	7.07	8.01	8.83	8.91	10.14
10-Yr	7.22	8.03	8.85	8.93	10.16

* Weighted average yields



Global Indices	Oct 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	51268	0.18	-1.98	9.64
Nasdaq	27477	1.05	5.52	20.62
FTSE 100	10498	0.34	-1.70	10.61
DAX	25254	0.09	-2.04	3.59
Nikkei 225	69947	2.40	0.29	52.82
Hang Seng	24040	0.28	2.96	-11.42
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Oct 5	1D Ago	3M Ago	1Y Ago
US	5.31	5.28	4.48	4.13
UK	5.42	5.38	4.79	4.70
German	3.49	3.45	2.93	2.70
Japan	3.09	3.10	2.77	1.66

Commodity Prices	Oct 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	100.32	102.25	72.12	64.53
NYMEX Crude Oil (\$/bbl)	89.43	91.11	68.69	60.88
Gold (Rs / 10 gm)#	148198	148138	146344	116954

ibjارات spot prices

Currencies Vs INR	Oct 5	1D Ago	M Ago	3M Ago
USD	96.28	95.99	94.49	95.24
GBP	127.22	127.22	127.97	127.41
Euro	107.79	108.62	109.88	109.15
100 Yen	61.03	60.67	60.52	59.25
Forex Reserve (\$ bn)*	747.56	765.90	740.80	666.93

* Data pertains to Oct 2 and Sep 25 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)

Disclaimer: SAV has taken due care and caution in preparing this Report based on the information obtained from sources which it considers reliable (Data). However, SAV does not guarantee the accuracy, adequacy or completeness of the Data / Report and is not responsible for any errors or omissions or for the results obtained from the use of Data / Report. This Report is not a recommendation to invest / disinvest in any entity covered in the Report and no part of this report should be construed as an investment advice. SAV especially states that it has no financial liability whatsoever to the subscribers/ users/ transmitters/ distributors of this Report. No part of this Report may be published / reproduced in any form without SAV's prior written approval.

SAV brand is owned by La Crème De La Crème Services LLP

Capital Market

- Bajaj Finance approved a Rs 17,500 crore fundraise, supporting its balance sheet expansion and future growth plans.
- TVS Automobile Solutions raised Rs 425 crore in a Series D funding round led by CE-Invests, the strategic investment arm of UAE-based Crescent Enterprises.
- Bharat Petroleum Corporation Ltd. (BPCL) plans to raise up to \$3 billion through international bond issuances, with the proceeds expected to fund its \$2.8 billion equity contribution to Brazil's SEAP-I offshore energy project and refinance existing debt obligations.

Global Equity

- Wall Street stocks closed higher on Monday supported by strength in technology stocks and optimism ahead of the corporate earnings season.
- US 10yr yield ended higher at 5.31% as investors absorbed new economic data and looked ahead to the release of the Federal Reserve's September meeting notes.
- FTSE index closed higher on Monday supported by gains in mining stocks and easing crude oil prices.
- Asian markets were trading higher at 8.30 AM.

International

- US ISM Services PMI rose to 55.4 in August 2026 compared to 54.1 in July 2026.
- US S&P Global Services PMI rose to 58.8 in September 2026 compared to 56.5 in August 2026 while the S&P Global Composite PMI rose to 58.4 from 56.
- Eurozone S&P Global Services PMI rose to 53.0 in September 2026 compared to 51.6 in August 2026 while the S&P Global Composite PMI increased to 53.1 from 52.
- Eurozone producer prices increased 8.2% year on year in August 2026, compared with a 5.8% rise in July 2026.
- UK S&P Global Services PMI edged lower to 52.1 in September 2026 compared to 52.5 in August 2026 while the S&P Global Composite PMI eased to 52.0 from 52.5.
- Japan's consumer confidence index edged down to 35.4 in September 2026 compared to 35.5 in August 2026.

Upcoming market indicators

- 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)