

Broad Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	72639	-0.59	-7.09	-11.34	19.28
Nifty 50	22603	-0.76	-7.36	-9.98	19.34
BSE Mid cap	45766	-0.37	-4.53	-0.93	NA
Nifty Midcap 100	59383	-0.63	-0.23	1.88	28.01

Sectoral Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	55961	-1.41	-7.32	-6.81
BSE Bankex	62060	-0.09	-5.71	-2.01
BSE CD	57542	-1.83	-6.92	-2.14
BSE CG	75227	-0.69	-3.93	8.21
BSE FMCG	17058	-0.58	-8.75	-15.39
BSE Healthcare	49741	-0.29	-0.04	12.90
BSE IT	26731	-1.15	-1.50	-21.66
BSE Metal	38923	-2.46	-3.85	15.71
BSE Oil & Gas	24749	-0.74	-6.43	-9.97
BSE Power	7194	-1.05	-7.66	5.67
BSE Realty	6429	-1.74	-7.67	-7.19

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Kotak Bank	1.88	TITAN	-3.80
BSE	1.54	Adani Enterp	-3.75
Bharti Airtel	1.29	Hindalco	-3.15
ICICI BANK	1.09	JSW Steel	-2.35
Coal India	0.69	BEL	-2.35

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 6	MF Inv Oct 6	DII Inv Oct 7
Buy	12592	4340	18707
Sell	15042	2859	14110
Net	-2450	1481	4597
Net (YTD)	-283165	439450	656891

Policy rates	Oct 7	1W Ago	M Ago	3M Ago
Repo (%)	5.50	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 7	1W Ago	M Ago	3M Ago
Call (%)	5.40	4.85	5.05	5.25
10 Yr Gilt(%)^	7.24	7.18	6.96	6.70
TREP (%)	5.03	5.15	4.50	6.00
Short-term debt	Oct 7	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.25	7.07	6.70	6.90
6-month CPs (%)	7.70	7.35	6.88	7.20
3-month CDs (%)	6.50	6.30	5.86	6.55
6-month CDs (%)	7.17	6.83	6.39	6.85
182-day T-bill (%)^	6.04	5.88	5.59	5.45
364-day T-bill (%)^	6.17	6.16	5.87	5.63
Long-term debt	Oct 7	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.80	6.68	6.29	6.14
5-Y G-sec (%)	7.11	7.02	6.62	6.36
10-Y G-sec (%)	7.24	7.18	6.96	6.70

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Wednesday after the RBI raised the repo rate and shifted its policy stance to 'calibrated tightening', signalling a tighter monetary policy environment.
- The top losers were Titan Company, Adani Enterprises, Hindalco Industries, JSW Steel and Bharat Electronics, down 2.35-3.80%.
- The top gainers were Kotak Mahindra Bank, BSE, Bharti Airtel, ICICI Bank and Coal India, up 0.69-1.88%.

Indian Debt

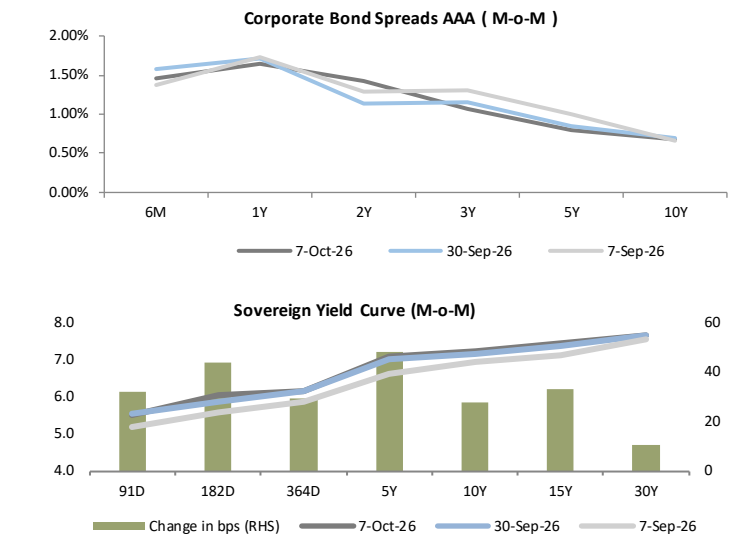
- The interbank call-money rate ended higher at 5.40% on Wednesday compared to 5.20% on Tuesday.
- Government bond prices ended lower on Wednesday after the RBI raised the repo rate by 25 bps, its first-rate hike in nearly four years, and signalled a tighter policy stance amid persistent inflation concerns.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.24% on Wednesday compared to 7.19% on Tuesday.

Economy and Government

- The Reserve Bank of India's (RBI's) Monetary Policy Committee (MPC) voted unanimously to increase the policy repo rate by 25 basis points (bps) to 5.50%. Accordingly, the standing deposit facility rate is 5.25%, while the marginal standing facility rate and Bank Rate are 5.75%. The MPC changed its stance to 'calibrated tightening' from 'neutral'.
- The RBI revised its FY2026-27 (FY27) real GDP growth forecast upward by 40 basis points to 7.1%.
- The RBI raised FY27 CPI inflation forecast at 5.2% FY27 while highlighting upside risks from below-normal monsoon conditions, El Niño-related weather disruptions and elevated global crude oil prices.
- The RBI projected core inflation at 4.4% for fiscal 2027, lower than the projected headline CPI inflation of 5.2%.
- RBI Governor Sanjay Malhotra said that the global economic environment was uncertain amid the re-escalation of the West Asia conflict, elevated crude prices, trade disruptions and tighter global financial conditions.
- India and the European Union (EU) launched an industry coalition for a Green Shipping Corridor, aimed at promoting low-carbon maritime transport and accelerating shipping decarbonisation initiatives.
- The government reduced sugar dealers' stock holding limits to 1,000 quintals from October 15 to November 30 to control retail prices during the festival period.
- Reserve Bank of India (RBI) formed the Financial Market Consultative Committee (FMCC) to enhance dialogue with market participants and improve financial market policymaking.
- Reserve Bank of India (RBI) has enabled interoperability among Account Aggregators, allowing seamless consent-based financial data sharing across platforms and strengthening India's digital financial infrastructure.
- RBI Governor Sanjay Malhotra noted that system liquidity remained in surplus, averaging Rs 5.9 lakh crore since the August policy meeting, while the RBI conducted 55 variable rate reverse repo auctions and open market operation sales of Rs 1 lakh crore to absorb surplus liquidity.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.16	7.74	8.46	8.54	9.77
3-Yr	6.80	7.98	8.70	8.78	10.01
5-Yr	7.11	8.01	8.83	8.91	10.14
10-Yr	7.24	8.03	8.85	8.93	10.16

* Weighted average yields



Global Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg
DJIA	51180	-0.66	-3.30	9.82
Nasdaq	27539	-0.22	6.66	20.85
FTSE 100	10459	-0.79	-1.94	10.28
DAX	25104	-1.35	-1.42	2.95
Nikkei 225	70036	-0.92	2.61	46.06
Hang Seng	24131	-0.62	2.70	-10.49
KOSPI	6804	-1.98	-11.13	96.88

Global 10 yr Sov. Yields (%)	Oct 7	1D Ago	3M Ago	1Y Ago
US	5.28	5.27	4.55	4.14
UK	5.45	5.40	4.86	4.72
German	3.48	3.48	2.99	2.71
Japan	3.11	3.09	2.84	1.67

Commodity Prices	Oct 7	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	100.2	100.58	74.16	65.45
NYMEX Crude Oil (\$/bbl)	88.28	89.44	70.44	61.73
Gold (Rs / 10 gm)#	147767	148473	144083	119941

ibjарates spot prices

Currencies Vs INR	Oct 7	1D Ago	M Ago	3M Ago
USD	96.62	96.43	94.45	95.31
GBP	127.98	127.38	127.68	127.55
Euro	108.45	108.07	109.67	108.94
100 Yen	61.01	60.96	60.62	58.83
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)

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Capital Market

- TD Power Systems launched a QIP with a floor price of Rs 775.35 per share to raise up to Rs 600 crore.
- Landmark Group raised Rs 330 crore in construction finance from State Bank of India (SBI) to support its real estate development activities.
- Zomint, a wealthtech startup, raised Rs 36 crore in its maiden funding round led by Lightspeed Venture Partners and Prime Venture Partners.
- ByteXL raised \$9 million in a funding round led by Elevar Equity to expand its edtech offerings and strengthen its presence in the skilling and higher-education segment.

Global Equity

- Wall Street stocks closed lower on Wednesday as rising long-term US Treasury yields reignited concerns over inflation and government debt, weighing on investor sentiment.
- US 10yr yield ended higher at 5.28% amid re-ignited worries that inflation may prove more stubborn than expected.
- FTSE index closed lower on Wednesday, weighed down by losses in financial stocks.
- Asian markets were trading lower at 8.30 AM.

International

- UK RICS Residential Market Survey showed that the house price balance deteriorated to -32% in September 2026 compared to -28% in August 2026.
- Japan's coincident economic index fell to 118.7 in August 2026 compared to a final 120.6 in the prior month.
- Japan's leading economic index increased to 118.0 in August 2026 compared to 117.6 in July 2026.

Upcoming market indicators

- 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)