

Broad Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	71593	-1.44	-6.42	-12.45	19.01
Nifty 50	22232	-1.64	-6.91	-11.24	19.02
BSE Mid cap	44716	-2.29	-4.80	-2.48	NA
Nifty Midcap 100	57883	-2.53	-2.75	0.03	27.30

Sectoral Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54689	-2.27	-7.34	-7.69
BSE Bankex	61542	-0.83	-4.13	-2.39
BSE CD	56698	-1.47	-6.98	-3.94
BSE CG	72954	-3.02	-5.54	6.21
BSE FMCG	16718	-1.99	-8.24	-16.71
BSE Healthcare	48507	-2.48	-1.42	10.54
BSE IT	26632	-0.37	-0.41	-23.10
BSE Metal	37624	-3.34	-6.21	12.11
BSE Oil & Gas	24101	-2.62	-7.06	-11.67
BSE Power	6941	-3.51	-9.96	3.50
BSE Realty	6232	-3.07	-8.77	-8.32

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Infosys	0.50	Adani Enterp	-5.36
Tech Mahindra	0.34	JSW Steel	-4.46
Axis Bank	0.20	ITC	-4.03
NA	NA	Max Health	-3.81
NA	NA	InterGlobe	-3.55

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 7	MF Inv Oct 6	DII Inv Oct 8
Buy	13369	4340	22988
Sell	19525	2859	12285
Net	-6156	1481	10703
Net (YTD)	-289320	439450	667594

Policy rates	Oct 8	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 8	1W Ago	M Ago	3M Ago
Call (%)	5.45	5.20	5.05	5.30
10 Yr Gilt(%)^	7.29	7.20	6.94	6.77
TREP (%)	5.30	5.04	4.00	5.50
Short-term debt	Oct 8	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.10	7.00	6.72	7.05
6-month CPs (%)	7.70	7.60	6.90	7.38
3-month CDs (%)	6.45	6.10	5.90	6.70
6-month CDs (%)	7.19	7.16	6.40	7.03
182-day T-bill (%)^	6.07	5.94	5.61	5.46
364-day T-bill (%)^	6.16	6.11	5.86	5.64
Long-term debt	Oct 8	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.77	6.74	6.29	6.21
5-Y G-sec (%)	7.09	7.03	6.62	6.44
10-Y G-sec (%)	7.29	7.20	6.94	6.77

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Thursday, weighed down by the RBI's tighter monetary policy stance and continued selling by foreign institutional investors.
- The top losers were Adani Enterprises, JSW Steel, ITC, Max Healthcare Institute and InterGlobe Aviation, down 3.55-5.36%.
- The top gainers were Infosys, Tech Mahindra and Axis Bank, up 0.20-0.50%.

Indian Debt

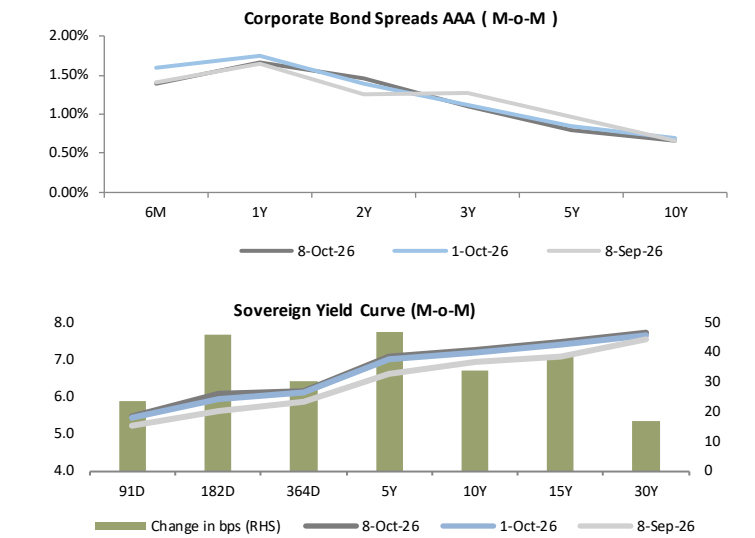
- The interbank call-money rate ended higher at 5.45% on Thursday compared to 5.40% on Wednesday.
- Government bond prices ended lower on Thursday as surging US Treasury yields and a sharp rise in crude oil prices heightened concerns over inflation and future interest rate hikes.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.29% on Thursday compared to 7.24% on Wednesday.

Economy and Government

- According to latest Annual Survey of Industries released by the Ministry of Statistics and Programme Implementation (MoSPI), India's manufacturing sector added 1.4 million jobs in FY25, supported by higher investment activity and capacity expansion across industries.
- The Ministry of Power introduced market-linked compensation norms for land acquired for power transmission projects, aimed at improving consistency and reducing disputes in land acquisition.
- Communications Minister Jyotiraditya Scindia said India aims to double its 5G user base to 1 billion by 2030 from the current 550 million users, while also positioning itself as a global leader in 6G technology development.
- Union Minister Pralhad Joshi announced plans to re-power approximately 25 GW of aging wind energy projects.
- The GST Council approved measures aimed at easing compliance and reducing litigation.
- UIDAI revised Aadhaar name-change rules, simplifying routine updates while requiring additional documentation, including Gazette notifications, for major name changes.
- Union IT Minister Ashwini Vaishnaw said the government will release a draft AI regulation paper within the next 30 days, outlining India's approach to the governance, regulation, and responsible development of artificial intelligence (AI).
- The Securities and Exchange Board of India introduced a mandatory colour coded credit risk-o-meter for debt securities in a move aimed at making credit risk easier for potential investors.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.22	7.79	8.51	8.59	9.82
3-Yr	6.77	8.02	8.74	8.82	10.05
5-Yr	7.09	8.05	8.87	8.95	10.18
10-Yr	7.29	8.07	8.89	8.97	10.20

* Weighted average yields



Global Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	51232	0.10	-2.13	9.93
Nasdaq	27193	-1.25	5.11	18.01
FTSE 100	10442	-0.16	-0.45	9.35
DAX	24807	-1.18	-0.36	0.85
Nikkei 225	69042	-1.42	3.33	44.64
Hang Seng	23786	-1.43	-1.71	-11.34
KOSPI	6626	-2.62	-8.57	91.73

Global 10 yr Sov. Yields (%)	Oct 8	1D Ago	3M Ago	1Y Ago
US	5.22	5.28	4.56	4.13
UK	5.43	5.45	4.96	4.70
German	3.49	3.48	3.09	2.68
Japan	3.09	3.11	2.88	1.70

Commodity Prices	Oct 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	104.28	100.2	78.02	66.25
NYMEX Crude Oil (\$/bbl)	91.49	88.28	73.52	62.55
Gold (Rs / 10 gm)#	147646	147767	142350	122098

ibjарates spot prices

Currencies Vs INR	Oct 8	1D Ago	M Ago	3M Ago
USD	96.77	96.62	94.72	95.22
GBP	127.74	127.98	128.28	127.25
Euro	108.38	108.45	110.14	108.77
100 Yen	61.19	61.01	61.69	58.73
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

- Manus raised more than \$500 million in fresh funding following the exit of Meta Platforms, strengthening its capital base to accelerate the development and expansion.
- ReNew signed an MoU with the Maharashtra Government to develop a Rs 70,000 crore green data centre park, supporting the state's renewable energy and digital infrastructure ambitions.
- Brigade Group plans to invest Rs 40,000 crore over the next three years to develop real estate and hospitality projects.
- DailyObjects secured Rs 332 crore in funding led by Xponentia Capital Partners, Anicut Capital, and Axiom Asia Private Capital, achieving a post-money valuation of Rs 1,050 crore.

Global Equity

- Wall Street stocks ended mixed on Thursday with the Dow Jones edging higher due to stock specific gains while Nasdaq declined as rising crude oil prices amid renewed Middle East tensions and US production disruptions fuelled inflation and interest-rate concerns.
- US 10yr yield ended lower at 5.22%, retreating from recent highs as strong demand at the US 30-year Treasury auction supported bond prices.
- FTSE index ended lower on Thursday as surging oil prices and a global bond sell-off revived inflation concern.
- Asian markets were trading mixed at 8.30 AM.

International

- US initial jobless claims decreased by 2,000 to 197,000 for the week ending October 3, 2026, compared to 199,000 in the previous week.
- Japan Economy Watchers Survey rose to 47.0 in September 2026 compared to 46.4 in August 2026.
- Japan Economy Watchers Survey Outlook eased to 47.4 in September 2026 compared to 48.3 in August 2026.
- Japan's household spending fell 3.1% yoy in August 2026, easing from July's decline of 3.6%.

Upcoming market indicators

- 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)