

Broad Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74316	2.11	-3.72	-10.04	19.69
Nifty 50	22997	1.66	-4.49	-9.19	19.65
BSE Mid cap	45643	-0.34	-5.71	-1.68	NA
Nifty Midcap 100	59197	-0.36	-0.54	0.39	27.84

Sectoral Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56591	1.47	-3.97	-5.03
BSE Bankex	62899	0.86	-3.77	-1.62
BSE CD	57866	-0.07	-7.74	-2.32
BSE CG	73381	-2.44	-7.24	6.22
BSE FMCG	17085	-0.82	-5.47	-15.26
BSE Healthcare	48329	0.02	-4.23	8.68
BSE IT	29402	1.51	6.22	-15.06
BSE Metal	38382	0.51	-4.88	13.36
BSE Oil & Gas	24765	1.46	-5.97	-9.24
BSE Power	7029	-1.84	-10.73	2.83
BSE Realty	6471	0.55	-9.37	-9.01

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Tech Mahindra	4.75	Nestle India	-7.76
ICICI Bank	3.80	Adani Enterp	-0.83
RIL	3.44	TRENT	-0.72
Bharti Airtel	3.31	Shriram Finance	-0.65
BSE	2.70	BEL	-0.51

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 14	MF Inv Oct 13	DII Inv Oct 15
Buy	17251	12444	19439
Sell	18353	9499	16119
Net	-1102	2945	3319
Net (YTD)	-305993	463379	683812

Policy rates	Oct 15	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	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 15	1W Ago	M Ago	3M Ago
Call (%)	5.75	5.45	5.20	5.35
10 Yr Gilt(%)^	7.39	7.29	7.08	6.77
TREP (%)	5.40	5.30	4.26	5.45
Short-term debt	Oct 15	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.30	7.10	6.85	7.25
6-month CPs (%)	7.80	7.70	7.15	7.50
3-month CDs (%)	6.80	6.45	6.14	6.83
6-month CDs (%)	7.40	7.19	6.75	7.12
182-day T-bill (%)^	6.34	6.07	5.65	5.53
364-day T-bill (%)^	6.47	6.16	5.86	5.66
Long-term debt	Oct 15	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.89	6.77	6.50	6.19
5-Y G-sec (%)	7.30	7.09	6.86	6.46
10-Y G-sec (%)	7.39	7.29	7.08	6.77

^Weighted average yield

Indian Equity

- Indian equity benchmarks surged on Thursday, supported by gains in information technology, banking and consumer stocks. Lower crude oil prices and a stronger rupee boosted investor sentiment even as concerns over US inflation persisted.
- The top gainers were Tech Mahindra, ICICI Bank, Reliance Industries, Bharti Airtel and BSE, up 2.70-4.75%.
- The top losers were Nestle India, Adani Enterprises, Trent, Shriram Finance and Bharat Electronics, down 0.51-7.76%.

Indian Debt

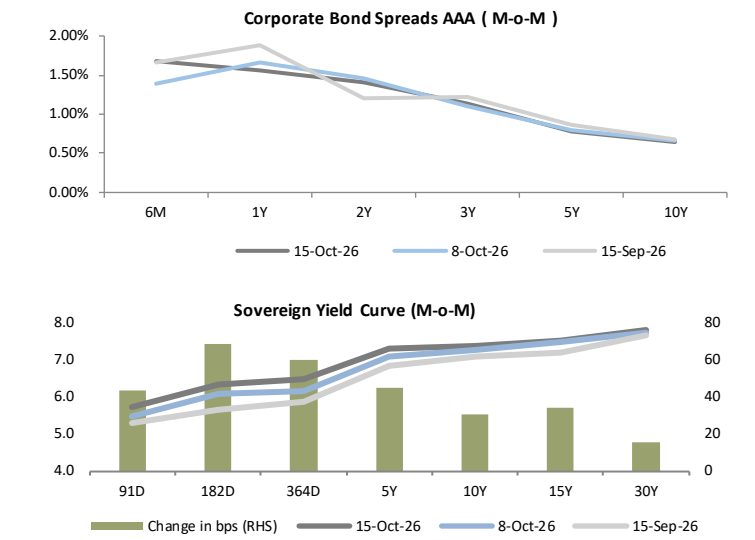
- The interbank call-money rate ended higher at 5.75% on Thursday compared to 5.60% on Wednesday.
- Government bond prices ended higher on Thursday as softer US Treasury yields supported sentiment and encouraged buying in government securities, though concerns over tighter domestic liquidity and additional debt supply limited gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.39% on Thursday compared to 7.40% on Wednesday.

Economy and Government

- India's merchandise trade deficit widened to \$30.21 billion in September 2026 from \$26.86 billion in August, as imports rose to \$74.61 billion while exports increased to \$44.40 billion.
- Merchandise exports grew 23.0% YoY to \$44.4 billion in September, while imports rose 8.0% to \$74.61 billion, according to provisional data released by the Ministry of Commerce & Industry.
- India unemployment rate was unchanged at 5.0% in September 2026 compared to previous month.
- India's net direct tax collections rose 13.2% to Rs 13.38 trillion as of October 14, supported by strong corporate tax receipts, while gross collections increased 14.9% to Rs 16.03 trillion.
- The World Bank Group said it has mobilised \$36 billion in private capital for India over the past four years, including \$9.6 billion for MSMEs, supporting private sector-led growth and job creation.
- Ministry of Defence signed contracts worth approximately Rs 4,106 crore for the acquisition of the GSAT-7C communication satellite capability and Varunastra heavyweight torpedoes.
- Prime Minister Narendra Modi virtually inaugurated and dedicated projects worth Rs 3,350 crore in Ladakh across roads, aviation, and renewable energy sectors.
- Central Railway has sought forest clearance for a Rs 1,620 crore fourth railway line between Kalyan and Asangaon in Maharashtra, aimed at enhancing rail capacity and improving commuter and freight movement on the busy corridor.
- The Reserve Bank of India (RBI) issued clarifications on its recent rupee-support measures following concerns regarding hedging rules and cash margin requirements for certain derivatives.
- SEBI requested IRDAI to consider including insurance-related information in the Consolidated Account Statement (CAS).

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.59	7.97	8.69	8.77	10.00
3-Yr	6.89	8.16	8.88	8.96	10.19
5-Yr	7.30	8.20	9.02	9.10	10.33
10-Yr	7.39	8.15	8.97	9.05	10.28

* Weighted average yields



Global Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg
DJIA	52178	1.08	-0.91	12.81
Nasdaq	26713	0.08	1.69	17.83
FTSE 100	10840	1.08	3.09	15.02
DAX	25383	0.33	1.53	4.97
Nikkei 225	64426	-4.90	-6.29	35.14
Hang Seng	24063	-1.03	-2.51	-7.13
KOSPI	5554	-7.57	-23.75	51.87

Global 10 yr Sov. Yields (%)	Oct 15	1D Ago	3M Ago	1Y Ago
US	5.1	5.19	4.55	4.05
UK	5.37	5.42	4.94	4.55
German	3.41	3.47	3.09	2.56
Japan	2.90	3.00	2.68	1.65

Commodity Prices	Oct 15	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	105.92	106.06	84.95	61.91
NYMEX Crude Oil (\$/bbl)	97.97	95.09	79.6	58.27
Gold (Rs / 10 gm)#	145942	146064	141908	126714

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Currencies Vs INR	Oct 15	1D Ago	M Ago	3M Ago
USD	95.07	95.03	95.93	96.22
GBP	125.87	126.10	129.19	129.07
Euro	106.57	106.53	110.59	110.08
100 Yen	60.19	60.03	61.94	59.33
Forex Reserve (\$ bn)*	734.61	747.56	785.71	674.19

* Data pertains to Oct 9 and Oct 2 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.54% (Sep'-2026)
WPI	11.39% (Sep'-2026)
IIP	8.00% (Aug' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

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Capital Market

- Palo Alto Networks raised approximately \$147.3 million through a share-linked prepaid forward transaction tied to 500,000 shares, enabling a structured monetisation of a portion of equity holdings without an immediate sale of the underlying shares.
- Formial Labs raised Rs 2.88 crore in a funding round led by Zeropearl VC to support its growth and business expansion.
- Circle raised Rs 25 crore in seed funding led by Nexus Venture Partners to expand its AI-driven pre-owned marketplace beyond Bengaluru.

Global Equity

- Wall Street stocks ended higher on Thursday buoyed by gains in healthcare and consumer stocks.
- US yield ended lower at 5.10% following the latest wholesale inflation data.
- FTSE index ended higher on Thursday after the finance minister reaffirmed the government's commitment to fiscal discipline.
- Asian markets were trading higher at 8.30 AM.

International

- US initial jobless claims increased by 1,000 to 199,000 in the week ending October 10, 2026.
- US producer prices increased to 159.78 points in September from 157.41 points in August.
- US retail sales grew 6.3% year-over-year in September 2026, following a 5.6% increase in August.
- Eurozone Industrial production fell 1.1% in August 2026, compared to a 0.3% drop in July 2026.
- UK construction output fell 1.8% in August 2026, compared to a 1.9% decline in the prior month.
- The UK GDP grew 2.1% year-on-year in August 2026, compared to 1.8% rise in July 2026.

Upcoming market indicators

- India Unemployment Rate, Sep (Oct 15)
- India Balance of Trade, Sep (Oct 15)
- India Imports/Exports, Sep (Oct 15)
- US Industrial Production, Sep (Oct 16)
- US Manufacturing Production, Sep (Oct 16)
- China GDP Growth Rate YoY Q3 (Oct 19)
- China Industrial Production, Sep (Oct 19)
- Eurozone Construction Output, Aug (Oct 20)
- Eurozone ZEW Economic Sentiment Index, Oct (Oct 20)
- UK Inflation Rate, Sep (Oct 21)
- India Infrastructure Output, Sep (Oct 21)
- Eurozone Consumer Confidence Flash, Oct (Oct 22)
- US S&P Global Manufacturing/Services/Composite PMI Flash, Oct (Oct 23)
- India HSBC Composite/ Services/ Manufacturing PMI Flash, Oct (Oct 23)
- US Chicago Fed National Activity Index, Sep (Oct 26)
- US Dallas Fed Manufacturing Index, Oct (Oct 26)