

Broad Indices	Oct 26	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73607	0.66	-3.23	-12.59	19.15
Nifty 50	22753	0.68	-4.27	-11.79	19.18
BSE Mid cap	43501	0.92	-8.37	-6.64	NA
Nifty Midcap 100	56465	1.19	-5.13	-4.67	18.79

Sectoral Indices	Oct 26	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54953	0.23	-8.06	-9.03
BSE Bankex	61144	0.09	-4.90	-6.06
BSE CD	54909	0.16	-12.69	-9.66
BSE CG	68906	1.35	-10.94	-0.60
BSE FMCG	16173	0.32	-11.60	-21.76
BSE Healthcare	47821	1.85	-3.19	6.55
BSE IT	30512	0.81	10.10	-13.47
BSE Metal	37659	2.55	-5.59	9.82
BSE Oil & Gas	24645	1.59	-5.42	-10.62
BSE Power	6691	1.19	-13.37	-2.03
BSE Realty	6175	1.10	-10.27	-15.52

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Dr Reddys	6.62	Shriram Finance	-4.62
JSW Steel	6.28	Tata Consumer Products	-2.84
BSE	3.97	Bajaj Finance	-1.10
Adani Ports and SEZ	2.92	HDFC Life Insurance	-0.91
Eternal	2.57	HDFC Bank	-0.69

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 23	MF Inv Oct 23	DII Inv Oct 26
Buy	15340	15209	15778
Sell	13069	12406	13249
Net	2272	2802	2530
Net (YTD)	-303824	468678	693622

Policy rates	Oct 26	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 26	1W Ago	M Ago	3M Ago
Call (%)	5.75	5.70	5.20	5.12
10 Yr Gilt(%)^	7.48	7.40	7.12	6.83
TREP (%)	5.76	5.24	5.45	5.04
Short-term debt	Oct 26	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.95	7.45	7.00	7.38
6-month CPs (%)	8.30	7.85	7.25	7.45
3-month CDs (%)	7.50	7.00	6.30	6.82
6-month CDs (%)	7.90	7.47	6.81	6.94
182-day T-bill (%)^	6.25	6.38	5.85	5.57
364-day T-bill (%)^	6.43	6.51	6.08	5.73
Long-term debt	Oct 26	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	7.00	6.87	6.62	6.22
5-Y G-sec (%)	7.41	7.25	6.99	6.49
10-Y G-sec (%)	7.48	7.40	7.12	6.83

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Monday, supported by post-earnings gains in heavyweight stocks. However, volatile crude oil prices and caution ahead of the Federal Reserve's policy outcome limited the market's upside.
- The top gainers were Dr. Reddy's Laboratories, JSW Steel, BSE, Adani Ports and Special Economic Zone and Eternal—up 2.57-6.62%.
- The top losers were Shriram Finance, Tata Consumer Products, Bajaj Finance, HDFC Life Insurance Company and HDFC Bank—down 0.69-4.62%.

Indian Debt

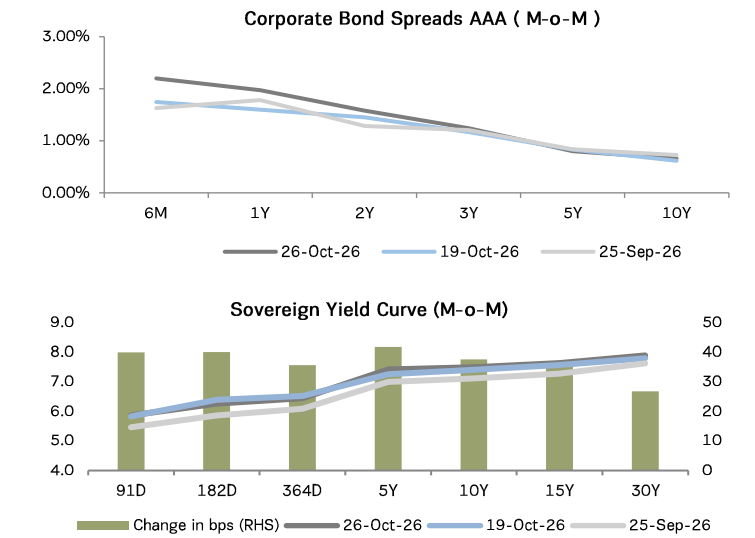
- The interbank call-money rate ended lower at 5.75% on Monday compared to 5.85% on Friday.
- Government bond prices ended marginally lower on Monday, as elevated crude oil prices and a weaker rupee weighed on sentiment.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.48% on Monday compared to 7.47% on Friday.

Economy and Government

- Finance Minister Nirmala Sitharaman reaffirmed the government's fiscal consolidation roadmap, targeting a reduction in public debt to 50% of GDP by 2030, while continuing efforts to manage inflation and support currency stability.
- The Ministry of Defence approved defence procurement proposals worth Rs 2.12 lakh crore to strengthen India's military capabilities and indigenous defence manufacturing.
- Bundelkhand in Uttar Pradesh attracted investment proposals exceeding Rs 80,000 crore across sectors including energy, data centres, infrastructure, and tourism.
- The Ministry of Road Transport and Highways (MoRTH) notified amendments permitting flex-fuel vehicles capable of operating on fuel blends of up to E100 ethanol, supporting the adoption of cleaner fuels and reducing dependence on conventional fuels.
- Commerce Minister Piyush Goyal said India and the United States are in the final stages of fine-tuning their proposed trade agreement, with most discussions concluded and only a few issues remaining to be resolved.
- The Central Board of Direct Taxes (CBDT) received around 1,100 applications under the foreign assets disclosure scheme, reflecting taxpayer participation in the initiative to declare overseas assets and income.
- The Maharashtra Government waived 25% of the land transfer fee for green energy projects, providing a boost to renewable energy investments in the state.
- Finance Minister Nirmala Sitharaman said the Reserve Bank of India (RBI) does not determine the value of the rupee but intervenes to manage excessive volatility and ensure orderly movements in the foreign exchange market.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.61	8.32	9.04	9.12	10.35
3-Yr	7.00	8.36	9.08	9.16	10.39
5-Yr	7.41	8.35	9.17	9.25	10.48
10-Yr	7.48	8.28	9.10	9.18	10.41

* Weighted average yields



Global Indices	Oct 26	1D % Chg	3M % Chg	1Y % Chg
DJIA	52362	0.28	0.80	10.92
Nasdaq	26169	0.82	4.78	12.78
FTSE 100	10767	0.72	0.29	11.63
DAX	25411	0.91	1.24	4.83
Nikkei 225	62190	-0.80	-3.75	26.15
Hang Seng	23212	0.51	-7.02	-11.27
KOSPI	5469	-1.46	-18.25	38.76

Global 10 yr Sov. Yields (%)	Oct 26	1D Ago	3M Ago	1Y Ago
US	5	5.00	4.69	4.02
UK	5.35	5.37	5.04	4.43
German	3.36	3.34	3.17	2.62
Japan	2.81	2.80	2.82	1.66

Commodity Prices	Oct 26	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	115.81	116.72	96.78	65.94
NYMEX Crude Oil (\$/bbl)	101.76	103.27	89.31	61.5
Gold (Rs / 10 gm)#	141710	141630	143781	121518

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Currencies Vs INR	Oct 26	1D Ago	M Ago	3M Ago
USD	95.15	94.94	95.89	96.54
GBP	127.23	127.13	126.83	128.53
Euro	106.72	106.45	109.16	109.87
100 Yen	60.57	60.49	60.65	58.93
Forex Reserve (\$ bn)*	721.02	726.03	765.90	676.24

* Data pertains to Oct 16 and Oct 9 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

- JioBlackRock Mutual Fund filed draft documents with SEBI for life-cycle and debt mutual fund schemes, expanding its domestic product portfolio.
- Matiks raised \$10 million in funding in a round led by General Catalyst to support product development and business expansion.
- Tata Communications plans to invest \$400-450 million over the next three to five years to build a 10,000-km fibre network connecting key data centre and AI hubs across India.
- Jyoti Structures secured Rs 949 crore worth of transmission line orders from Power Grid Corporation of India, significantly strengthening its order book and revenue visibility.
- Raymond Realty secured Rs 210 crore from the ICICI Prudential Real Estate Development Fund.

Global Equity

- Wall Street stocks closed higher on Monday as renewed optimism around AI-related stocks boosted sentiment in the technology sector and supported broader market gains.
- US yield ended flat at 5% as investors remained on sidelines ahead of Fed policy meet outcome.
- FTSE index closed higher on Monday supported by improved sentiment toward AI-related stocks, while investors awaited the UK budget and the U.S. Federal Reserve's policy decision.
- Asian markets were trading mixed at 8.30 AM.

International

- US Chicago Fed National Activity Index improved to 0.07 in September 2026, from -0.08 in August.
- US Dallas Fed Manufacturing Index rose to 13.4 in October 2026 from 9.8 in September.
- China's industrial profits rose 15.5% year-on-year in the first nine months of 2026, compared to a 15.7% increase in the January-August period.
- Japan's coincident economic index eased to 118.8 in August 2026 compared to 120.6 in July 2026 while the leading economic index rose to 118.0 from 117.6.

Upcoming market indicators

- US Chicago Fed National Activity Index, Sep (Oct 26)
- US Dallas Fed Manufacturing Index, Oct (Oct 26)