

Broad Indices	Oct 27	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73599	-0.01	-4.21	-13.19	19.14
Nifty 50	22750	-0.02	-5.19	-12.39	19.07
BSE Mid cap	43944	1.02	-8.49	-6.36	NA
Nifty Midcap 100	57030	1.00	-4.18	-4.60	25.98

Sectoral Indices	Oct 27	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	55843	1.62	-7.99	-8.07
BSE Bankex	60713	-0.70	-6.31	-7.33
BSE CD	55009	0.18	-13.44	-9.81
BSE CG	69907	1.45	-10.28	0.70
BSE FMCG	16285	0.69	-11.86	-21.38
BSE Healthcare	48910	2.28	-2.55	9.03
BSE IT	30445	-0.22	7.38	-13.89
BSE Metal	37923	0.70	-5.51	9.39
BSE Oil & Gas	24779	0.54	-5.11	-11.47
BSE Power	6813	1.82	-12.28	-0.46
BSE Realty	6276	1.64	-10.81	-15.34

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Tata Consumer Products	6.78	Asian Paints	-1.94
Bharti Airtel	3.20	Coal India	-1.73
Bajaj Auto	3.17	Grasim Industries	-1.67
BSE	2.44	SBI	-1.63
Trent	2.42	TCS	-1.50

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 26	MF Inv Oct 23	DII Inv Oct 27
Buy	10094	15209	15703
Sell	11057	12406	16953
Net	-964	2802	-1250
Net (YTD)	-304787	468678	692372

Policy rates	Oct 27	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 27	1W Ago	M Ago	3M Ago
Call (%)	5.74	5.70	5.20	5.28
10 Yr Gilt(%)^	7.45	7.40	7.12	6.77
TREP (%)	5.74	5.24	5.45	5.40
Short-term debt	Oct 27	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.98	7.45	7.00	7.30
6-month CPs (%)	8.30	7.85	7.25	7.40
3-month CDs (%)	7.50	7.00	6.30	6.79
6-month CDs (%)	7.90	7.47	6.81	6.90
182-day T-bill (%)^	6.26	6.38	5.85	5.55
364-day T-bill (%)^	6.44	6.51	6.08	5.68
Long-term debt	Oct 27	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	7.00	6.87	6.62	6.18
5-Y G-sec (%)	7.38	7.25	6.99	6.42
10-Y G-sec (%)	7.45	7.40	7.12	6.77

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended flat on Tuesday, as gains in banking stocks offset pressure from elevated crude oil prices, while investors remained cautious ahead of the US Federal Reserve's policy decision.
- The top gainers were Tata Consumer Products, Bharti Airtel, Bajaj Auto, BSE and Trent, up 2.42-6.78%.
- The top losers were Asian Paints, Coal India, Grasim Industries, State Bank of India and Tata Consultancy Services, down 1.50-1.94%.

Indian Debt

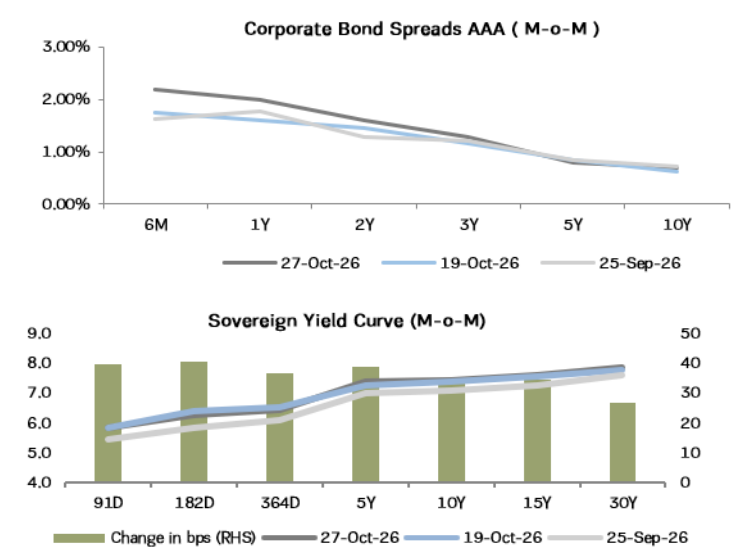
- The interbank call-money rate ended lower at 5.74% on Tuesday compared to 5.75% on Monday.
- Government bond prices ended higher on Tuesday, supported by value buying, ahead of key global central bank policy decisions.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.44% on Tuesday compared to 7.48% on Monday.

Economy and Government

- Prime Minister Narendra Modi said India is transitioning from adopting global technologies to creating them, urging innovators to lead in developing solutions for future global challenges.
- Commerce Minister Piyush Goyal said negotiations on India's proposed free trade agreement with Chile are nearing conclusion, while discussions with Canada are progressing, potentially boosting trade, exports, and investment flows.
- Petroleum Minister Hardeep Singh Puri said India is well-positioned to become a major global refining hub as refining capacity in several countries declines.
- Hardeep Singh Puri also said the government has no plans to increase ethanol blending beyond 20%, providing policy clarity for the fuel and biofuels sectors.
- Commerce Minister Piyush Goyal said India is poised to emerge as a major exporter to China and the ASEAN region in the coming years.
- The Uttarakhand Government presented a supplementary budget of Rs 7,844 crore, aimed at funding additional expenditure and development initiatives during the fiscal year.
- The Reserve Bank of India (RBI) has proposed a Rs 50 lakh sub-limit under the Liberalised Remittance Scheme (LRS) for overseas travel-related spending, including business travel and pilgrimages, as part of measures aimed at moderating dollar outflows and supporting external sector stability.
- SEBI extended the deadline for debenture trustees to comply with revised regulatory requirements until April 1, 2027, providing additional time to implement the necessary systems, processes, and governance frameworks under the updated norms.
- Pension Fund Regulatory and Development Authority (PFRDA) Chairman said integrating the National Pension System (NPS) into payroll systems alongside provident fund contributions should be simple and seamless for employers.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.64	8.34	9.06	9.14	10.37
3-Yr	7.00	8.37	9.09	9.17	10.40
5-Yr	7.38	8.37	9.19	9.27	10.50
10-Yr	7.45	8.32	9.14	9.22	10.45

* Weighted average yields



Global Indices	Oct 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	52378	0.03	0.32	10.17
Nasdaq	26478	1.18	6.20	12.02
FTSE 100	10687	-0.75	-0.88	10.70
DAX	25591	0.71	0.91	5.27
Nikkei 225	63268	1.73	-2.56	25.25
Hang Seng	23041	-0.73	-8.59	-12.83
KOSPI	5638	3.09	-16.54	39.47

Global 10 yr Sov. Yields (%)	Oct 27	1D Ago	3M Ago	1Y Ago
US	4.99	5.00	4.65	4.01
UK	5.35	5.35	5.00	4.40
German	3.36	3.36	3.13	2.62
Japan	2.80	2.81	2.78	1.66

Commodity Prices	Oct 27	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	113.88	115.81	88.36	65.62
NYMEX Crude Oil (\$/bbl)	99.9	101.76	82.61	61.31
Gold (Rs / 10 gm)#	141431	141710	144466	121077

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Currencies Vs INR	Oct 27	1D Ago	M Ago	3M Ago
USD	95.16	95.15	95.89	96.19
GBP	126.87	127.23	126.83	128.47
Euro	106.27	106.72	109.16	109.76
100 Yen	60.33	60.57	60.65	58.80
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

- Cent raised \$15 million to expand its AI-powered preventive healthcare platform and strengthen its healthcare offerings.
- SimpliSmart raised \$14 million in a Series B funding round to expand its AI inference platform and accelerate enterprise AI deployment capabilities.
- Advent International raised \$30 billion, including nearly \$27 billion for its 11th flagship buyout fund, strengthening its capacity for global private equity investments.
- Larsen & Toubro (L&T)'s Transportation Infrastructure business secured design-and-build orders valued between Rs 5,000 crore and Rs 10,000 crore for two key system packages of Bangladesh's Dhaka Metro Line 1.
- Sigma Advanced Systems secured a Rs 973 crore order from NATO, strengthening its defence order book and international presence.

Global Equity

- Wall Street stocks ended higher on Tuesday, supported by renewed optimism around AI-related stocks, which boosted technology shares and lifted broader market sentiment.
- US yield ended lower at 4.99% as investors remained caution ahead of Fed policy meeting outcome.
- FTSE index closed lower on Tuesday, weighed down by losses in banking stocks, while investor caution persisted ahead of the UK budget announcement.
- Asian markets were trading higher at 8.30 AM.

International

- US private employers added an average of 16,750 jobs per week during the four weeks ended October 10, 2026, according to the ADP Research Institute.
- US S&P Case-Shiller 20-City Home Price Index rose 2.7% YoY in August 2026, marking its strongest annual increase since May 2025 and exceeding market expectations.
- US single-family home prices backed by Fannie Mae and Freddie Mac increased 2.4% YoY in August 2026, slightly lower than the 2.5% rise recorded in July.
- US Federal Reserve Fifth District Manufacturing Index remained unchanged at -2 in October 2026.
- US Dallas Fed Services Index improved to 4 in October 2026 from -1.8 in September 2026.

Upcoming market indicators

- US Building Permits Final, Sep (Oct 27)
- US ADP Employment Change Weekly (Oct 27)
- US Fed Interest Rate Decision (Oct 28)
- Eurozone ECB Consumer Inflation Expectations, Sep (Oct 28)
- US GDP Price Index QoQ Adv Q3 (Oct 29)
- Eurozone Economic Sentiment, Oct (Oct 29)
- US Chicago PMI, Oct (Oct 30)
- Eurozone GDP Growth Rate QoQ Final Q3 (Oct 30)
- China NBS Non Manufacturing PMI, Oct (Oct 31)
- China NBS General PMI, Oct (Oct 31)