

Broad Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73246	-0.48	-4.59	-13.45	19.02
Nifty 50	22699	-0.22	-5.36	-12.48	18.99
BSE Mid cap	44104	0.36	-8.23	-6.13	NA
Nifty Midcap 100	57275	0.43	-3.77	-4.17	26.07

Sectoral Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56593	1.34	-7.41	-6.44
BSE Bankex	61006	0.48	-5.24	-6.93
BSE CD	55390	0.69	-13.98	-8.60
BSE CG	70019	0.16	-7.93	1.01
BSE FMCG	16207	-0.48	-11.15	-21.43
BSE Healthcare	49432	1.07	-1.49	10.31
BSE IT	29907	-1.77	2.36	-14.90
BSE Metal	37659	-0.70	-5.65	7.24
BSE Oil & Gas	24262	-2.09	-7.27	-12.77
BSE Power	6820	0.11	-10.07	-0.08
BSE Realty	6254	-0.36	-13.03	-14.79

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Apollo Hospitals Enterprise	4.43	Infosys	-3.43
L&T	3.72	Reliance Industries	-3.19
Trent	3.31	ONGC	-2.16
SBI Life Insurance Company	2.06	Tech Mahindra	-1.92
IndiGo	2.03	Bhrti Airtel	-1.55

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 27	MF Inv Oct 23	DII Inv Oct 28
Buy	30869	15209	17241
Sell	20285	12406	16598
Net	10584	2802	643
Net (YTD)	-294203	468678	693016

Policy rates	Oct 28	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 28	1W Ago	M Ago	3M Ago
Call (%)	5.70	5.71	4.99	5.35
10 Yr Gilt(%)^	7.44	7.44	7.19	6.78
TREP (%)	5.26	5.74	4.70	5.30
Short-term debt	Oct 28	1W Ago	M Ago	3M Ago
3-month CPs (%)	8.02	7.80	7.17	7.25
6-month CPs (%)	8.30	8.10	7.35	7.40
3-month CDs (%)	7.58	7.38	6.25	6.80
6-month CDs (%)	7.89	7.70	6.85	6.90
182-day T-bill (%)^	6.56	6.30	5.85	5.55
364-day T-bill (%)^	6.62	6.47	6.07	5.68
Long-term debt	Oct 28	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	7.03	6.89	6.67	6.22
5-Y G-sec (%)	7.39	7.33	7.06	6.42
10-Y G-sec (%)	7.44	7.44	7.19	6.78

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Wednesday, as rising crude oil prices weighed on investor sentiment. However, losses were partly offset by optimism over a major market debut, which bolstered broader market confidence.
- The top losers were Infosys, Reliance Industries, Oil and Natural Gas Corporation, Tech Mahindra, and Bharti Airtel, down 1.55-3.43%.
- The top gainers were Apollo Hospitals Enterprise, Larsen & Toubro, Trent, SBI Life Insurance Company and InterGlobe Aviation, up 2.03-4.43%.

Indian Debt

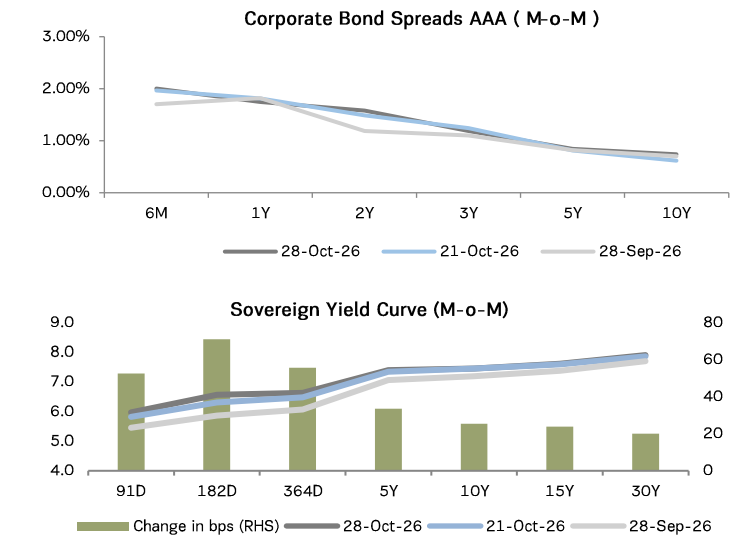
- The interbank call-money rate ended lower at 5.70% on Wednesday compared to 5.74% on Tuesday.
- Government bond prices ended flat on Wednesday, as losses due to oil-driven inflation concerns were offset by short-covering, while investors remained cautious ahead of the US Federal Reserve's policy decision.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 7.44% on Wednesday.

Economy and Government

- India's industrial production growth slowed to 6.7% year-on-year in September 2026, compared to a downwardly revised 7.8% (8% previously) in August 2026.
- Manufacturing output in India increased by 7.6% year-on-year in September 2026.
- India and Mexico agreed on the terms of reference for negotiating a Preferential Trade Agreement (PTA), advancing bilateral trade talks.
- Ministry of Finance raised the Industrial Dearness Allowance (IDA) for eligible Central Public Sector Enterprises (CPSE) executives and non-unionised supervisors to 59.1% under the 2017 pay scale, effective October 1, 2026.
- The Union Cabinet approved a Rs 10,000 crore Container Manufacturing Assistance Scheme to boost domestic shipping container production, reduce import dependence, strengthen logistics infrastructure, and support India's manufacturing competitiveness.
- The Cabinet approved the Khelo India Sports Goods Manufacturing Scheme to support the development of the sports goods industry.
- The Union Cabinet approved a 3 percentage point increase in Dearness Allowance (DA) for central government employees and pensioners, raising the allowance to 63% of basic pay/pension from 60%, effective July 1, 2026.
- SEBI signed a Memorandum of Understanding (MoU) with the Bank of England to enhance cooperation and oversight of clearing corporations, supporting financial market stability and cross-border regulatory coordination.
- Securities and Exchange Board of India (SEBI) Chairman Tuhin Kanta Pandey said the regulator will review compliance requirements for foreign investors and align regulations with global standards to enhance India's attractiveness as an investment destination and improve market access for overseas capital.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.68	8.34	9.06	9.14	10.37
3-Yr	7.03	8.37	9.09	9.17	10.40
5-Yr	7.39	8.37	9.19	9.27	10.50
10-Yr	7.44	8.32	9.14	9.22	10.45

* Weighted average yields



Global Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg
DJIA	52475	0.19	-0.52	10.00
Nasdaq	26550	0.27	6.72	11.43
FTSE 100	10695	0.07	-1.62	10.29
DAX	25704	0.44	0.94	5.87
Nikkei 225	63954	1.08	2.55	27.35
Hang Seng	23095	0.23	-8.76	-12.34
KOSPI	6012	6.63	-0.19	49.92

Global 10 yr Sov. Yields (%)	Oct 28	1D Ago	3M Ago	1Y Ago
US	5.05	4.99	4.61	3.99
UK	5.35	5.35	4.95	4.40
German	3.38	3.36	3.11	2.62
Japan	2.83	2.80	2.77	1.63

Commodity Prices	Oct 28	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	115.32	113.88	84.09	64.4
NYMEX Crude Oil (\$/bbl)	102.78	99.9	79.26	60.18
Gold (Rs / 10 gm)#	142707	141431	142291	118043

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Currencies Vs INR	Oct 28	1D Ago	M Ago	3M Ago
USD	95.23	95.16	95.97	95.80
GBP	126.47	126.87	127.03	127.35
Euro	105.86	106.27	109.20	108.93
100 Yen	60.31	60.33	60.88	58.52
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

- GAIL India will invest Rs 600 crore (\$63 million) in a heating unit at its Ratnagiri LNG terminal, with the project expected to be completed by June 2027.
- Subros secured a Rs 1,225 crore HVAC supply contract from Maruti Suzuki India Ltd for two vehicle models over a period of approximately seven years.
- JSW Greentech secured an order from JSW Cement to supply 100 AmpStar trucks, strengthening its presence in the commercial electric mobility segment.
- Tata Projects secured an order from Gujarat State Fertilizers & Chemicals (GSFC) to build an acid complex in Gujarat.

Global Equity

- Wall Street stocks closed higher on Wednesday after the Federal Reserve left interest rates unchanged, while an improved assessment of the U.S. economy and expectations of a potential rate hike in December supported investor sentiment.
- US yield ended higher at 5.05% after Federal Reserve kept interest rate unchanged in its October policy meeting.
- FTSE index closed marginally higher on Wednesday, supported by gains in banking stocks after the UK budget imposed a lower-than-feared levy on the sector, although weakness in consumer goods and healthcare stocks limited broader market gains.
- Asian markets were trading mixed at 8.30 AM.

International

- The US Federal Reserve kept the federal funds rate unchanged at 3.75%-4.00% in October 2026, citing strong economic growth, resilient labour market conditions, and still-elevated inflation.

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)