

Daily Market Monitor

October 06, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	03-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24894	0.23	0.73	5.85	-1.41
BSE Sensex	81207	0.28	0.79	4.90	-1.56
BSE 100	26098	0.29	0.73	6.19	-2.45
BSE 200	11310	0.35	0.78	6.66	-3.13
BSE 500	36165	0.42	0.72	7.70	-3.44
BSE SmallCap	53375	1.09	0.66	14.44	-5.36
BSE MidCap	45678	0.78	-0.22	9.99	-5.55
BSE LargeCap	9610	0.29	0.89	6.39	-2.64
Sectoral indices					
BSE IT	33548	0.26	-3.54	-7.13	-20.48
BSE Oil & Gas	27094	0.55	3.66	7.80	-12.07
BSE FMCG	20299	0.24	-3.02	4.38	-13.26
BSE Auto	59712	0.03	3.43	25.17	0.47
BSE Bankex	62741	0.54	3.79	5.37	6.77
BSE Teck	16642	0.45	-2.61	-4.08	-14.92
BSE Capital Goods	69458	1.02	3.04	10.74	-1.83
BSE Consumer Durable	58649	1.15	-5.89	7.85	-12.15

Turnover (Rs Cr)	03-Oct	01-Oct
BSE Cash	7767	8498
NSE Cash	112828	99745
NSE F&O	19474415	12373319

Rs. Cr (Equity)	FII Inv 01-Oct	MF Inv 29-Sep	DII Inv 03-Oct
Buy	14,431	33,998	13,449
Sell	14,247	30,778	12,920
Net	184	3,220	528
Net (MTD)	184	44,582	3,391
Net (YTD)	-153,010	397,769	562,557

	03-Oct	1Day	Month ago	Year ago
USD	88.78	88.68	88.11	83.97
GBP	119.32	119.49	117.78	110.14
Euro	104.08	104.36	102.48	92.69
100 Yen	60.16	60.23	59.28	57.17

Indian markets

- Indian equity benchmarks closed higher on Friday, boosted by gains in metal and banking stocks driven by Fed rate cut hopes and a weaker dollar index.
- The top gainers were Tata Steel, Power Grid Corporation, Hindalco, Axis Bank and Kotak Mahindra—up 1.80-3.40%.
- The top losers were Max Healthcare, Coal India, Eicher Motors, Tech Mahindra and Maruti Suzuki—down 1.00-3.95%.

Indian debt

- The interbank call money rate ended higher at 5.45% on Friday compared to 5.00% on Wednesday.
- Government bond prices were marginally higher on Friday as investors sold the note after the issue of the new 10-year bond.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.51% on Friday compared to 6.52% on Wednesday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday, pressured by relentless dollar demand from importers and the ongoing US-India trade frictions.

Regulatory

- The Reserve Bank of India (RBI) plans to introduce scale-based thresholds beyond which regulated entities (REs) such as banks and non-banking financial companies (NBFCs) will need board approval for lending to related parties.
- The Reserve Bank of India (RBI) has proposed major changes to the framework for external commercial borrowings (ECBs), linking borrowing limits to the financial strength of companies and allowing funds to be raised at market-determined interest rates.
- RBI data showed States and Union Territories plan to borrow up to Rs 2.81 trillion through state government securities in the third quarter of the current financial year.
- RBI Governor Sanjay Malhotra said perhaps gold price is acting as a new barometer reflecting global uncertainties as the crude oil used to be in the recent past.
- The Reserve Bank of India granted "self-regulatory organisation" status to the Finance Industry Development Council (FIDC) to help ensure regulatory compliance in the non-banking lending sector.
- SEBI has rolled out "Validated UPI Handles" and "SEBI Check" to significantly bolster investor payment security.
- NITI Aayog has proposed an optional presumptive taxation regime for foreign companies operating in India
- The Telecom Regulatory Authority of India (TRAI) released the recommendations on the digital broadcast policy that allows analogue FM radio channels to add a digital layer along the same frequency.

Economy and Government

- India's foreign exchange (forex) reserves fell by \$2.3 billion to \$700.23 billion in the week ended September 26.
- Prime Minister Narendra Modi launched a series of education and skilling initiatives worth over Rs 62,000 crore in Bihar.
- The government has extended the last date for filing fresh applications under the PLI scheme for the textiles sector till December 31.

Domestic Debt Market Indicators

Instrument	03-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.45%	5.00%	5.35%	5.28%	7.00%	5.75%
3-Month T-Bill	5.43%	5.44%	5.51%	5.31%	6.34%	6.47%
6-Month T-Bill	5.55%	5.54%	5.59%	5.46%	6.47%	6.54%
1-year T-Bill	5.55%	5.54%	5.62%	5.53%	6.40%	6.54%
3-Month CD	5.85%	5.75%	5.83%	5.78%	7.00%	7.15%
6-Month CD	6.18%	6.20%	6.10%	5.98%	7.25%	7.43%
1-year CD	6.35%	6.40%	6.38%	6.22%	7.15%	7.58%
3-Month CP	6.53%	6.40%	6.45%	6.25%	7.25%	7.65%
6-Month CP	6.70%	6.70%	6.60%	6.40%	7.55%	7.80%
1-year CP	6.90%	6.90%	6.78%	6.60%	7.45%	7.85%
1-year Gilt	5.59%	5.60%	5.61%	5.55%	6.40%	6.61%
3-year Gilt	5.93%	5.93%	6.14%	5.83%	6.44%	6.69%
5-year Gilt	6.11%	6.12%	6.29%	6.08%	6.45%	6.69%
1-year AAA	6.67%	6.72%	6.72%	6.45%	7.29%	7.63%
3-year AAA	6.91%	6.96%	6.92%	6.63%	7.11%	7.45%
5-year AAA	6.95%	7.00%	6.97%	6.67%	7.11%	7.30%
10-year G-sec	6.51%	6.52%	6.54%	6.29%	6.58%	6.78%
Net LAF (Rs Cr)	176781	78021	297367	404417	-9354	288364
Forex reserves (\$ bn)	700.24	702.57	690.72	697.94	642.49	692.30

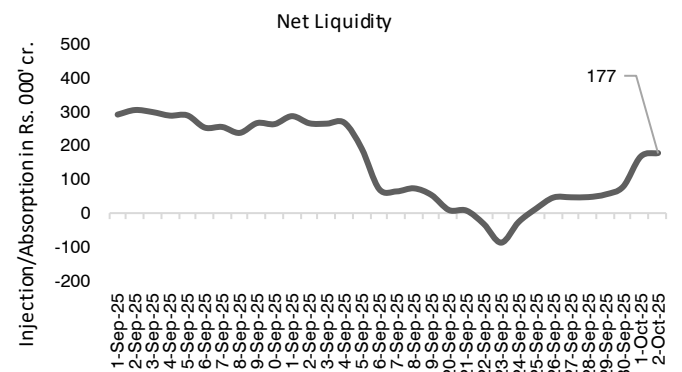
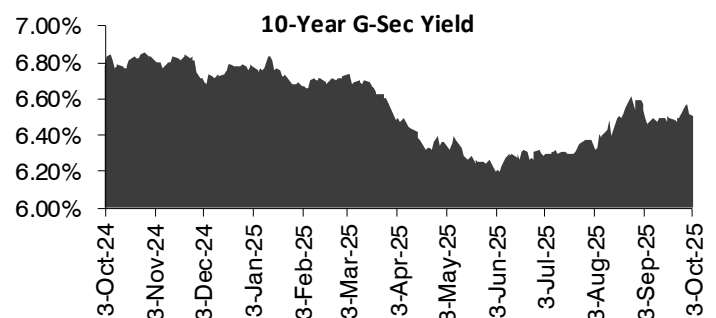
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.46	7.17	7.21	8.44	8.97
1 Year	5.59	6.67	7.38	7.42	8.65	9.18
3 Year	5.81	6.91	7.62	7.66	8.89	9.42
5 Year	6.11	6.95	7.76	7.79	9.03	9.56
10 Year	6.51	7.19	8.00	8.03	9.27	9.80

Rs. Cr (Debt)	FII Inv 01-Oct	MF Inv 29-Sep
Buy	437	11,472
Sell	347	13,286
Net	91	-1,814
Net (MTD)	91	-52,813
Net (YTD)	9,032	-466,262

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.07% (Aug-25)	2.82% (May-25)	3.65% (Aug-24)
WPI	0.52% (Aug-25)	0.39% (May-25)	1.31% (Aug-24)
IIP	4.0% (Aug-25)	1.9% (May-25)	0.0% (Aug-24)
GDP	7.8% (Apr-Jun FY26)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY25)
India Manufacturing PMI#	58.5 (Sep-25)	58.4 (June-25)	56.5 (Sep-24)
India Service PMI#	61.6 (Sep-25)	60.4 (June-25)	57.7 (Sep-24)
Bank Credit Growth*	0.70% (Sep 05, 2025)		0.13% (Aug 22, 2025)
Bank Deposit Growth*	0.84% (Sep 05, 2025)		0.21% (Aug 22, 2025)

Capital markets

- Eldeco Infrastructure and Properties Ltd has filed preliminary papers with capital markets regulator Sebi to raise Rs 1,000 crore through an initial public offering (IPO)
- Capri Global Capital announced a public issue of non-convertible debentures (NCDs) worth up to Rs 400 crore, including a Rs 200-crore greenshoe option.
- Steel Exchange India secured a Rs 350 crore refinancing facility from a consortium of financial institutions.
- BVG India files IPO papers with Sebi, aims to raise Rs 300 cr via fresh issue.
- Truhome Finance to receive an additional Rs 500 crore capital infusion from its largest shareholder.



Global market indices	03-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46758.28	0.51	3.28	11.32	11.30
Nikkei 225	45769.5	1.85	9.13	28.50	18.72
FTSE	9491.25	0.67	3.41	10.58	14.59
Hang Seng	27140.92	-0.54	7.09	17.39	22.73
Taiwan	26761.06	1.45	11.04	29.31	19.52

Global debt	03-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.13	4.10	4.22	4.35	4.23	3.85
UK 10-Year (%)	4.70	4.69	4.75	4.55	4.68	4.02
German 10-Year (%)	2.70	2.70	2.74	2.58	2.73	2.14
Japan 10-Year (%)	1.66	1.66	1.64	1.44	1.49	0.87

Domestic	03-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	116954	-0.32	10.31	31.17	54.67
Silver (Rs / Kg)	145610	0.34	18.17	44.32	60.59
Aluminium (Rs / Kg)	261	0.50	1.60	3.82	7.35
Copper (Rs / kg)	978	1.89	7.70	8.82	13.86
Lead (Rs / kg)	182	-1.09	-2.88	-2.30	-3.65
Zinc (Rs /Kg)	297	1.94	6.80	8.20	1.85
Nickel (Rs / kg)	1358	0.43	0.24	-4.02	-10.74

Global	03-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3844.61	-0.68	8.97	23.98	44.52
Silver (oz/\$)	4657.00	-2.04	14.20	36.49	46.22
Brent (\$/bbl)	64.53	0.66	-4.54	-13.70	-16.86
NYMEX crude (\$/bbl)	60.88	0.66	-4.83	-14.83	-17.41

Global markets

- Wall Street stocks ended mixed on Friday with Nasdaq ending higher amid optimism around artificial intelligence and hopes for a Fed rate cut while Dow Jones declined due to stock specific cues.
- 10-year US bond yield ended higher at 4.13% following weaker-than-expected services PMI.
- FTSE index ended higher on Friday buoyed by gains in banking and mining stocks.
- Asian markets were trading mixed at 8.30 AM.
- US ISM Services PMI eased to 50.0 in September of 2025 compared to 52.0 in August 2025.
- US S&P Global Services PMI eased to 54.2 in September of 2025 compared to 54.5 in August 2025 and US S&P Global Composite PMI eased to 53.9 in September of 2025 compared to 54.6 in August 2025.
- Eurozone HCOB Services rose to 51.3 in September 2025, compared to 50.5 in August 2025 and Eurozone HCOB Composite PMI rose to 51.2 in September 2025, compared to 51.0 in August 2025.
- Eurozone PPI fell to -0.6% in August of 2025 compared to 0.2% in July 2025.
- UK S&P Global Services PMI eased to 50.8 in September of 2025 compared to 54.2 in August 2025 and US S&P Global Composite PMI eased to 50.1 in September of 2025 compared to 53.5 in August 2025.

Commodity

- Crude oil prices rose by 40 cents to \$60.88 a barrel on the NYMEX amid weakness in the dollar index.
- Domestic gold prices ended lower due to profit booking at higher level.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Oct 6	UK S&P Global Construction PMI, Sep	45.5
Oct 7	UK Halifax House Price Index, Sep	2.2%
Oct 8	Japan Bank Lending, Sep	3.6%
Oct 9	Us Initial Jobless Claims Sep/27	218K
Oct 10	Japan PPI Sep	2.7%

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

*Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers

Indicators		Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24
Debt Indicators	Currency in circulation (Rs billion)	38116	38147	38372	38344	37762	36997	36444	35893	35643	35,589
	Repo rate	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%
	Call rate	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%
	Forex reserves (\$ billion; mthly. avg.)	692	698	699	689	682	656	638	629	648	666
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	1876.84	2675.69	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7
	IIP, %y/y	NA	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%
	Exports, \$ billion	NA	37.24	35.14	38.73	38.49	41.97	36.91	36.43	38.01	32.11
	Imports, \$ billion	NA	64.59	53.92	60.61	64.91	63.51	50.96	59.42	59.95	69.95
	Manufacturing PMI	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5
	Services PMI	65.6	60.5	60.4	58.8	58.7	58.5	59	56.5	59.3	58.4
	GST collections (Rs crore)	186315	195735	184597	201050	236716	196141	183646	195506	176857	182,269
	India crude oil import (mbpd)	NA	18.56	20.32	21.3	21.0	22.7	19.1	21.2	20.2	19.07
Sector update	Auto – Passenger vehicles	NA	0%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%	9.8%	20.7%
	Auto – Two-wheelers	NA	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%
	Auto – Commercial vehicles	NA	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%
	Auto – Tractors	NA	8%	10.50%	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%
	Infra – Coal	NA	-12.30%	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%
	Infra – Electricity	NA	0.50%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%	6.2%	4.40%
	Infra – Steel	NA	12.80%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%	7.3%	10.5%
	Infra – Cement	NA	11.70%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%	10.3%	13.10%

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