

Daily Market Monitor

October 07, 2025

Domestic Market Performance

Indian market indices	06-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25078	0.74	1.36	6.63	0.25
BSE Sensex	81790	0.72	1.34	5.65	0.12
BSE 100	26282	0.70	1.46	6.93	-0.79
BSE 200	11384	0.66	1.57	7.36	-1.51
BSE 500	36376	0.58	1.49	8.33	-1.93
BSE SmallCap	53271	-0.20	0.98	14.22	-4.78
BSE MidCap	45988	0.68	1.16	10.73	-4.00
BSE LargeCap	9672	0.64	1.54	7.07	-1.03
Sectoral indices					
BSE IT	34207	1.96	0.46	-5.30	-19.25
BSE Oil & Gas	27360	0.98	5.87	8.86	-10.32
BSE FMCG	20261	-0.19	-2.31	4.18	-11.96
BSE Auto	59900	0.32	1.73	25.57	2.32
BSE Bankex	63432	1.10	4.84	6.53	8.63
BSE Teck	16908	1.60	0.34	-2.54	-13.51
BSE Capital Goods	69564	0.15	4.06	10.90	-1.05
BSE Consumer Durable	58638	-0.02	-6.03	7.83	-10.96

Turnover (Rs Cr)	06-Oct	03-Oct
BSE Cash	7189	7767
NSE Cash	96872	112828
NSE F&O	28434336	19474415

Rs. Cr (Equity)	FII Inv 03-Oct	MF Inv 01-Oct	DII Inv 06-Oct
Buy	18,292	11,376	15,516
Sell	19,876	8,521	10,634
Net	-1,584	2,855	4,882
Net (MTD)	-1,401	2,855	8,272
Net (YTD)	-154,595	402,483	567,439

	06-Oct	1Day	Month ago	Year ago
USD	88.79	88.78	88.32	83.97
GBP	119.33	119.32	118.92	110.56
Euro	103.99	104.08	103.08	92.58
100 Yen	59.09	60.16	59.59	57.33

Indian markets

- Indian equity benchmarks closed higher on Monday, supported by banking and financial stocks following strong quarterly loan growth, while IT stocks gained ahead of earnings announcements for the second quarter of this fiscal.
- The top gainers were Max Healthcare, Shriram Finance, TCS, Apollo Hospital, and Tech Mahindra, rising 2.76-6.59%.
- The top losers were Tata Steel, Adani Ports, Power Grid Corporation of India, Eicher Motors and ITC, falling 0.88-1.82%.

Indian debt

- The interbank call money rate ended lower at 5.00% on Monday compared to 5.45% on Friday.
- Government bond prices declined marginally on Monday as earlier gains, due to lower-than-expected quarterly borrowing announced by states, were capped by profit booking.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Monday compared to 6.51% on Friday.

Indian Rupee

- The rupee ended almost flat against the US dollar on Monday as reports of intervention by the Reserve Bank of India relieved the pressure from a steady dollar demand.

Regulatory

- The Competition Commission of India (CCI), in its latest market study on artificial intelligence (AI), has called for responsible autonomy while urging enterprises to include self-audit of AI systems to address potential competition concerns..

Economy and Government

- India's HSBC services activity expanded for the twenty-sixth consecutive month in September, though the pace of growth eased to 60.9 from 62.9 in August while composite PMI eased to 61.0 from 63.2.
- Crisil said that gross non-performing assets (NPAs) of banks are likely to have bottomed out and are expected to remain in the 2.3–2.5% range by March 31, 2026. Bad loans had reached a historic low of 2.3% as of March 31, 2025.
- Government has begun early-stage talks with local insurers about designing a nationwide climate-linked insurance programme aimed at simplifying the payout process after extreme weather events such as heatwaves and floods.
- Tamil Nadu CM M.K. Stalin announced 20% bonus and ex-gratia for 'C' and 'D' category workers and employees in all state public sector undertakings (PSUs).
- Bihar Chief Minister Nitish Kumar inaugurated the first phase of the 3.6-km elevated stretch of the priority corridor of the Patna Metro rail project.

Domestic Debt Market Indicators

Instrument	06-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.45%	5.00%	4.75%	7.00%	6.25%
3-Month T-Bill	5.43%	5.43%	5.48%	5.32%	6.34%	6.47%
6-Month T-Bill	5.54%	5.55%	5.60%	5.48%	6.47%	6.54%
1-year T-Bill	5.55%	5.55%	5.63%	5.53%	6.40%	6.54%
3-Month CD	5.84%	5.85%	5.81%	5.78%	7.00%	7.20%
6-Month CD	6.19%	6.18%	6.13%	6.00%	7.25%	7.43%
1-year CD	6.33%	6.35%	6.38%	6.20%	7.15%	7.58%
3-Month CP	6.51%	6.53%	6.45%	6.20%	7.25%	7.60%
6-Month CP	6.67%	6.70%	6.55%	6.40%	7.55%	7.75%
1-year CP	6.90%	6.90%	6.80%	6.60%	7.45%	7.80%
1-year Gilt	5.61%	5.59%	5.64%	5.57%	6.40%	6.59%
3-year Gilt	5.91%	5.93%	6.07%	5.83%	6.44%	6.70%
5-year Gilt	6.12%	6.11%	6.22%	6.06%	6.45%	6.74%
1-year AAA	6.65%	6.67%	6.77%	6.45%	7.29%	7.66%
3-year AAA	6.89%	6.91%	6.89%	6.63%	7.11%	7.48%
5-year AAA	6.93%	6.95%	6.94%	6.67%	7.11%	7.33%
10-year G-sec	6.52%	6.51%	6.46%	6.30%	6.58%	6.83%
Net LAF (Rs Cr)	174628	176781	287605	404417	-9354	281101
Forex reserves (\$ bn)	700.24	702.57	694.23	702.78	642.49	704.89

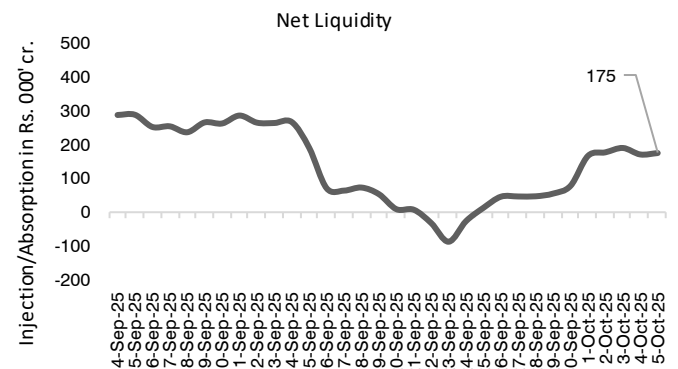
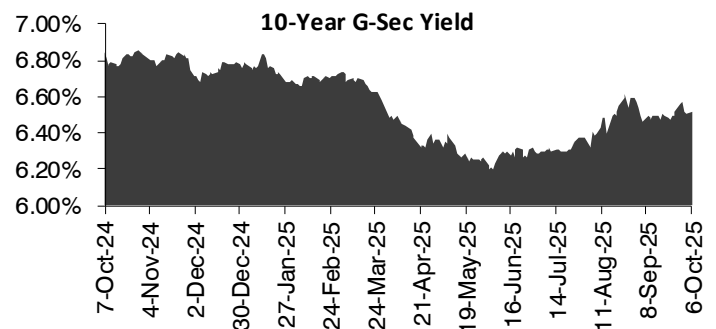
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	6.47	7.18	7.22	8.45	8.98
1 Year	5.61	6.65	7.36	7.40	8.63	9.16
3 Year	5.80	6.89	7.60	7.64	8.87	9.40
5 Year	6.12	6.93	7.74	7.77	9.01	9.54
10 Year	6.52	7.17	7.98	8.01	9.25	9.78

Rs. Cr (Debt)	FII Inv 03-Oct	MF Inv 01-Oct
Buy	2,331	18,382
Sell	1,089	12,115
Net	1,242	6,266
Net (MTD)	1,332	6,266
Net (YTD)	10,273	-463,130

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

- Lenskart Solutions received approval from the Securities and Exchange Board of India (SEBI) to raise Rs 2,150 crore through an initial public offering (IPO)
- Mann Fleet Partners filed its draft papers with markets regulator Sebi to raise funds through an Initial Public Offering (IPO).
- Advit Jewels filed its Draft Red Herring Prospectus (DRHP) with Sebi for its proposed initial public offering (IPO)..
- Tata Capital, LG Electronics to launch IPOs worth over Rs 27,000 cr.



Global market indices	06-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46694.97	-0.14	2.85	11.17	10.25
Nikkei 225	47944.76	4.75	11.45	34.61	24.09
FTSE	9479.14	-0.13	2.94	10.44	14.47
Hang Seng	26957.77	-0.67	6.06	16.60	18.56
Taiwan	Closed	NA	NA	NA	NA

Global debt	06-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.18	4.13	4.10	4.35	4.23	3.98
UK 10-Year (%)	4.74	4.70	4.66	4.55	4.68	4.13
German 10-Year (%)	2.72	2.70	2.66	2.57	2.73	2.21
Japan 10-Year (%)	1.69	1.66	1.57	1.44	1.49	0.90

Domestic	06-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	119249	1.96	12.14	33.74	56.98
Silver (Rs / Kg)	148833	2.21	20.84	47.52	61.42
Aluminium (Rs / Kg)	261	0.15	1.99	3.98	7.25
Copper (Rs / kg)	990	1.28	9.32	10.21	15.75
Lead (Rs / kg)	188	3.24	1.81	0.86	-4.22
Zinc (Rs /Kg)	298	0.30	7.22	8.53	2.39
Nickel (Rs / kg)	1361	0.16	0.78	-3.87	-9.80

Global	06-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3886.80	1.10	9.51	25.34	46.35
Silver (oz/\$)	4799.00	3.05	17.77	40.65	49.78
Brent (\$/bbl)	65.47	1.46	-0.05	-12.44	-16.12
NYMEX crude (\$/bbl)	61.69	1.33	-0.29	-13.70	-17.06

Global markets

- Wall Street stocks ended mixed on Monday with Nasdaq gaining as artificial intelligence-related dealmaking boosted rally in chip stocks while Dow Jones declined on concerns regarding a potential prolonged US government shutdown.
- 10-year US bond yield ended higher at 4.18% as the US government shutdown continued and investors monitored the state of the economy.
- FTSE index declined on Monday led by selloff in shares of Mondi following disappointing results and due to an unexpected resignation of France's new prime minister Sebastian Lecornu and his government.
- Asian markets were trading higher at 8.30 AM.
- Eurozone retail sales rose by 1.0% year-over-year in August 2025, easing from a 2.1% growth in the previous month.
- Eurozone S&P Global Construction PMI fell to 46 in September 2025, from 46.7 in the previous month
- UK S&P Global Construction PMI rose to 46.2 in September 2025 from 45.5 in August.
- Japan household spending increased by 2.3% yoy in August accelerating from a 1.4% growth in the previous month.

Commodity

- Crude oil prices rose by 81 cents to \$61.69 a barrel on the NYMEX on easing oversupply woes after the OPEC+ production increase plans for November was more modest than expected.
- Domestic gold prices ended higher due to safe haven buying.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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%
Oct 13	India Inflation Rate Sep	2.07%

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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