

Domestic Market Performance

Indian market indices	07-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25108	0.12	1.48	6.76	1.26
BSE Sensex	81927	0.17	1.51	5.83	1.08
BSE 100	26325	0.16	1.62	7.11	0.51
BSE 200	11404	0.17	1.75	7.55	-0.08
BSE 500	36437	0.17	1.66	8.51	-0.31
BSE SmallCap	53190	-0.15	0.83	14.05	-1.71
BSE MidCap	46196	0.45	1.62	11.23	-1.75
BSE LargeCap	9685	0.14	1.68	7.21	0.28
Sectoral indices					
BSE IT	34121	-0.25	0.21	-5.54	-19.71
BSE Oil & Gas	27489	0.47	6.37	9.37	-7.70
BSE FMCG	20161	-0.49	-2.79	3.67	-11.75
BSE Auto	60050	0.25	1.98	25.88	2.97
BSE Bankex	63332	-0.16	4.68	6.36	10.78
BSE Teck	16948	0.23	0.58	-2.32	-13.70
BSE Capital Goods	69522	-0.06	3.99	10.84	1.06
BSE Consumer Durable	58803	0.28	-5.76	8.13	-8.99

Turnover (Rs Cr)	07-Oct	06-Oct
BSE Cash	8114	7189
NSE Cash	98573	96872
NSE F&O	66245373	28434336

Rs. Cr (Equity)	FII Inv 06-Oct	MF Inv 01-Oct	DII Inv 07-Oct
Buy	11,218	11,376	14,572
Sell	12,689	8,521	13,808
Net	-1,472	2,855	764
Net (MTD)	-2,873	2,855	9,036
Net (YTD)	-156,066	402,483	568,203

	07-Oct	1Day	Month ago	Year ago
USD	88.73	88.79	88.32	83.97
GBP	119.38	119.33	118.92	110.10
Euro	103.71	103.99	103.08	92.19
100 Yen	58.90	59.09	59.59	56.69

Indian markets

- Indian equity benchmarks closed higher on Tuesday, led by gains in financial stocks amid optimism around the Reserve Bank of India's new lending reforms and expectations of upbeat corporate updates ahead of second quarter earnings.
- The top gainers were Bharti Airtel, Bajaj Auto, Jio Financial, Eicher Motors, and HCL Tech, up 1.11-1.36%.
- The top losers were Axis Bank, Tata Motors, TATA Consumer Products, Trent, and Adani Enterprises, down 1.22-2.14%.

Indian debt

- The interbank call money rate ended flat at 5.00% on Tuesday.
- Government bond prices ended higher on Tuesday on strong demand for state debt.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.51% on Tuesday compared to 6.52% on Monday.

Indian Rupee

- The rupee ended higher against the United States dollar on Tuesday in anticipation of initial public offer-related foreign inflows.

Regulatory

- The Reserve Bank of India (RBI) will launch a pilot on deposit tokenisation on Wednesday.
- The National Payments Corporation of India (NPCI) has set up a new subsidiary, NPCI Tech Solutions Limited (NTSL), to drive experimentation and breakthrough innovations in the fintech sector.

Economy and Government

- Prime Minister Narendra Modi will inaugurate the Navi Mumbai International Airport (NMIA) in Maharashtra.
- Finance Minister Nirmala Sitharaman launched a foreign currency settlement system in GIFT City.
- The Union Cabinet approved four major railway projects worth Rs 24,634 crore to boost capacity and connectivity across central India.
- Delhi government is set to prohibit property registrations in case outstanding property bills are not cleared.
- Tamil Nadu Chief Minister M K Stalin launches AeroDefCon 2025, TN eyes Rs 75,000 cr investment by 2032.
- The Maharashtra Cabinet approved a new gems and jewellery policy that targets to attract Rs 1 lakh crore investment and create five lakh employment opportunities in the key sector.
- Assocham president Sanjay Nayar said the recent goods and services tax (GST) relief, on top of the income tax breather this year, may offer private firms what they want in times of Trump tariffs-a secular rise in domestic consumption.

Domestic Debt Market Indicators

Instrument	07-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.00%	5.00%	4.90%	7.00%	5.75%
3-Month T-Bill	5.41%	5.43%	5.48%	5.33%	6.34%	6.46%
6-Month T-Bill	5.54%	5.54%	5.60%	5.41%	6.47%	6.52%
1-year T-Bill	5.55%	5.55%	5.63%	5.52%	6.40%	6.55%
3-Month CD	5.84%	5.84%	5.81%	5.73%	7.00%	7.24%
6-Month CD	6.19%	6.19%	6.13%	6.00%	7.25%	7.43%
1-year CD	6.33%	6.33%	6.38%	6.16%	7.15%	7.58%
3-Month CP	6.51%	6.51%	6.45%	6.20%	7.25%	7.52%
6-Month CP	6.67%	6.67%	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	5.60%	5.61%	5.64%	5.57%	6.40%	6.59%
3-year Gilt	5.90%	5.91%	6.07%	5.81%	6.44%	6.71%
5-year Gilt	6.11%	6.12%	6.22%	6.05%	6.45%	6.76%
1-year AAA	6.62%	6.65%	6.77%	6.45%	7.29%	7.67%
3-year AAA	6.86%	6.89%	6.89%	6.63%	7.11%	7.49%
5-year AAA	6.90%	6.93%	6.94%	6.67%	7.11%	7.34%
10-year G-sec	6.51%	6.52%	6.46%	6.30%	6.58%	6.85%
Net LAF (Rs Cr)	158819	174628	287605	343837	-9354	157431
Forex reserves (\$ bn)	700.24	702.57	694.23	702.78	642.49	704.89

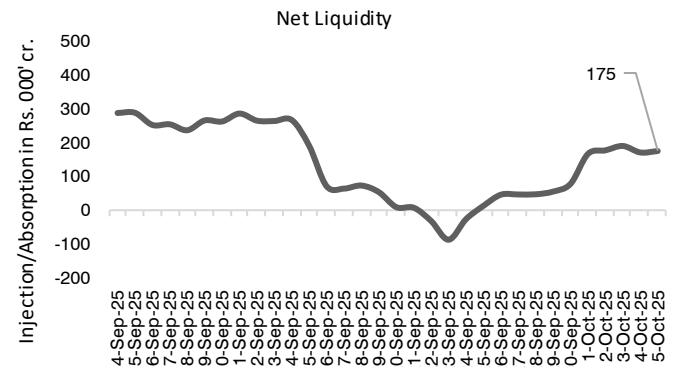
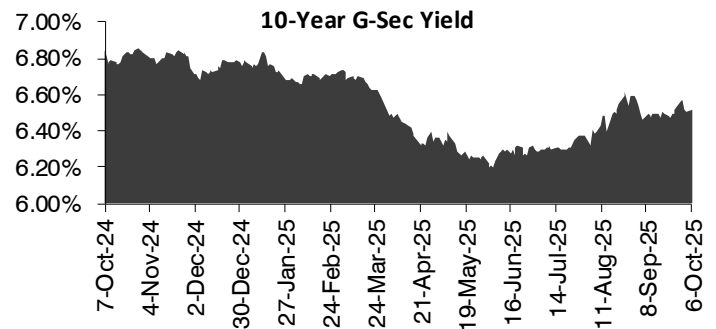
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	6.47	7.18	7.22	8.45	8.98
1 Year	5.60	6.62	7.33	7.37	8.60	9.13
3 Year	5.79	6.86	7.57	7.61	8.84	9.37
5 Year	6.11	6.90	7.71	7.74	8.98	9.51
10 Year	6.51	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 06-Oct	MF Inv 01-Oct
Buy	772	18,382
Sell	446	12,115
Net	326	6,266
Net (MTD)	1,658	6,266
Net (YTD)	10,599	-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*	-0.52% (Sep 19, 2025)		0.70% (Sep 05, 2025)
Bank Deposit Growth*	0.54% (Sep 19, 2025)		0.84% (Sep 05, 2025)

Capital markets

- Sai Parenteral's files DRHP for IPO, aims to raise Rs 285-cr via fresh issue.
- Anantam Highways Trust raises Rs 180 cr as IPO.
- TrusTerra raises Rs 9 crore pre-seed led by Finvolve and India Accelerator.
- Solex Energy announced it had received NSE's approval to migrate equity shares from the NSE EMERGE Platform to the main board platform of NSE.



Global market indices	07-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46602.98	-0.20	2.65	10.95	11.08
Nikkei 225	47950.88	0.01	11.47	34.63	21.91
FTSE	9483.58	0.05	2.99	10.50	14.21
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	27211.95	1.68	11.09	31.48	19.86

Global debt	07-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.14	4.18	4.10	4.40	4.23	4.03
UK 10-Year (%)	4.72	4.74	4.66	4.58	4.68	4.21
German 10-Year (%)	2.71	2.72	2.66	2.61	2.73	2.25
Japan 10-Year (%)	1.67	1.69	1.57	1.47	1.49	0.93

Domestic	07-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	119941	0.58	12.79	34.52	57.96
Silver (Rs / Kg)	149441	0.41	21.33	48.12	62.54
Aluminium (Rs / Kg)	261	0.00	1.99	3.98	7.54
Copper (Rs / kg)	998	0.81	10.20	11.10	16.79
Lead (Rs / kg)	184	-2.31	-0.54	-1.47	-4.44
Zinc (Rs /Kg)	296	-0.59	6.59	7.89	1.28
Nickel (Rs / kg)	1355	-0.40	0.37	-4.25	-10.65

Global	07-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3952.03	1.68	11.35	27.44	49.02
Silver (oz/\$)	4862.00	1.31	19.31	42.50	51.09
Brent (\$/bbl)	65.45	-0.03	-0.08	-12.46	-19.13
NYMEX crude (\$/bbl)	61.73	0.06	-0.23	-13.64	-19.98

Global markets

- Wall Street stocks closed ended lower on Tuesday after a consumer expectations survey from the New York Federal Reserve showed weakening future expectations and rising inflation projections.
- 10-year US bond yield ended lower at 4.14% amid lack of any progress in resolving the standoff between Republicans and Democrats that's shut down the government.
- FTSE index ended flat on Tuesday as gains buoyed by rally in energy stocks were offset by selloffs in retailer's stocks.
- Asian markets were trading lower at 8.30 AM.
- US consumer inflation expectations for the year ahead rose to 3.4% in September 2025, the highest in five months, compared to 3.2% in August.
- UK Halifax House Price Index rose 1.3% on year in September, easing from a 2% gain in August.
- Japan's leading economic index rose to 107.4 in August 2025, up from July's 106.1.
- Japan's coincident economic index fell to 113.4 in August 2025 from 114.1 in the previous month.

Commodity

- Crude oil prices rose by 4 cents to \$61.73 a barrel on the NYMEX amid supply concerns.
- Domestic gold prices ended higher due to safe haven buying amid global growth worries.

Forthcoming results

NA	NA
----	----

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 14	India WPI Inflation Sep	0.52%

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully