

Daily Market Monitor

October 09, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	08-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25046	-0.25	1.10	6.49	0.13
BSE Sensex	81774	-0.19	1.22	5.63	0.17
BSE 100	26232	-0.35	1.13	6.73	-1.01
BSE 200	11355	-0.43	1.10	7.09	-1.81
BSE 500	36278	-0.44	1.01	8.04	-2.13
BSE SmallCap	52967	-0.42	0.11	13.57	-4.46
BSE MidCap	45852	-0.74	0.53	10.40	-4.26
BSE LargeCap	9649	-0.38	1.11	6.81	-1.31
Sectoral indices					
BSE IT	34634	1.50	2.54	-4.12	-18.95
BSE Oil & Gas	27284	-0.75	5.28	8.56	-9.53
BSE FMCG	20072	-0.44	-2.88	3.21	-12.75
BSE Auto	59242	-1.35	-2.43	24.19	-0.09
BSE Bankex	63051	-0.44	4.13	5.89	9.07
BSE Teck	17174	1.34	2.65	-1.01	-12.96
BSE Capital Goods	68690	-1.20	2.37	9.51	-2.89
BSE Consumer Durable	59022	0.37	-4.74	8.53	-9.30

Turnover (Rs Cr)	08-Oct	07-Oct
BSE Cash	7643	8114
NSE Cash	89603	98573
NSE F&O	15750872	66245373

Rs. Cr (Equity)	FII Inv 07-Oct	MF Inv 06-Oct	DII Inv 08-Oct
Buy	12,663	11,478	10,578
Sell	10,999	8,120	10,821
Net	1,664	3,358	-243
Net (MTD)	-1,209	6,186	8,793
Net (YTD)	-154,403	405,814	567,959

	08-Oct	1Day	Month ago	Year ago
USD	88.79	88.73	88.32	83.96
GBP	118.88	119.38	118.92	109.96
Euro	103.08	103.71	103.08	92.30
100 Yen	58.24	58.90	59.59	56.80

Indian markets

- Indian equity benchmark indices closed lower on Wednesday, as investors booked profits.
- The top losers were Tata Motors, M&M, Jio Financial, UltraTech Cement and Bharat Electronics, which fell 1.57-2.36%.
- The top gainers were Titan Company, Infosys, TCS, HCL Technologies, and Tech Mahindra, rising 1.34-4.31%.

Indian debt

- The interbank call money rate ended lower at 4.95% on Wednesday 5.00% on Tuesday.
- Government bond prices ended higher on Wednesday buoyed by states and central governments' reduced debt supply, and Reserve Bank of India's dovish stance.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.50% on Wednesday compared to 6.51% on Tuesday.

Indian Rupee

- The rupee ended flat against the US dollar on Wednesday as a fall due to strong dollar index were cut short amid report of likely central bank intervention.

Regulatory

- The Reserve Bank of India launched a retail sandbox for its central bank digital currency (CBDC), enabling fintech firms to develop and test solutions for the ongoing pilot.
- The Securities and Exchange Board of India (Sebi) has revamped the block deal framework for both T+1 and optional T+0 settlement cycles.
- Chairman Tuhin Kanta Pandey said the Securities and Exchange Board of India (Sebi) has drawn up an action plan and capacity-building measures to ensure the quantum readiness of its regulated systems.
- Ananth Narayan G said the Securities and Exchange Board of India (Sebi) is reviewing the securities lending and borrowing (SLB) framework to make it more user-friendly.
- The Employees' Provident Fund Organisation (EPFO) announced a contest inviting citizens to contribute a slogan in Hindi that reflects its mission of social security, trust and financial empowerment worth Rs 21,000.

Economy and Government

- Prime Minister Narendra Modi inaugurated the final phase of Mumbai Metro Line-3, also known as the Aqua Line.
- Prime Minister Narendra Modi inaugurated Phase 1 of the Navi Mumbai International Airport (NMIA), constructed at a cost of approximately Rs 19,650 crore.
- The Ministry of Mines proposed relaxation in mineral auction rules by reducing the minimum number of technically qualified bidders required to proceed with block auctions in the first attempt from three to two.

Domestic Debt Market Indicators

Instrument	08-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.00%	5.00%	4.90%	7.00%	6.40%
3-Month T-Bill	5.41%	5.41%	5.48%	5.31%	6.34%	6.44%
6-Month T-Bill	5.53%	5.54%	5.60%	5.43%	6.47%	6.52%
1-year T-Bill	5.53%	5.55%	5.63%	5.52%	6.40%	6.55%
3-Month CD	5.89%	5.84%	5.81%	5.72%	7.00%	7.10%
6-Month CD	6.20%	6.19%	6.13%	6.00%	7.25%	7.44%
1-year CD	6.37%	6.33%	6.38%	6.16%	7.15%	7.54%
3-Month CP	6.53%	6.51%	6.45%	6.20%	7.25%	7.55%
6-Month CP	6.67%	6.67%	6.55%	6.40%	7.55%	7.75%
1-year CP	6.90%	6.90%	6.80%	6.65%	7.45%	7.80%
1-year Gilt	5.58%	5.60%	5.64%	5.57%	6.40%	6.58%
3-year Gilt	5.91%	5.90%	6.07%	5.82%	6.44%	6.68%
5-year Gilt	6.11%	6.11%	6.22%	6.06%	6.45%	6.73%
1-year AAA	6.62%	6.62%	6.77%	6.45%	7.29%	7.67%
3-year AAA	6.86%	6.86%	6.89%	6.63%	7.11%	7.49%
5-year AAA	6.90%	6.90%	6.94%	6.67%	7.11%	7.34%
10-year G-sec	6.51%	6.51%	6.46%	6.31%	6.58%	6.81%
Net LAF (Rs Cr)	148046	158819	236007	307212	-9354	164089
Forex reserves (\$ bn)	700.24	702.57	694.23	702.78	642.49	704.89

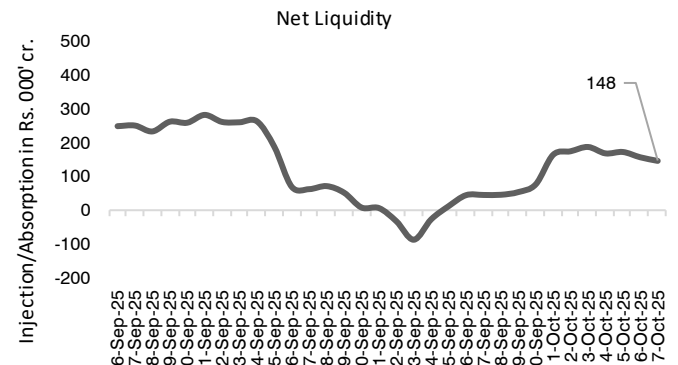
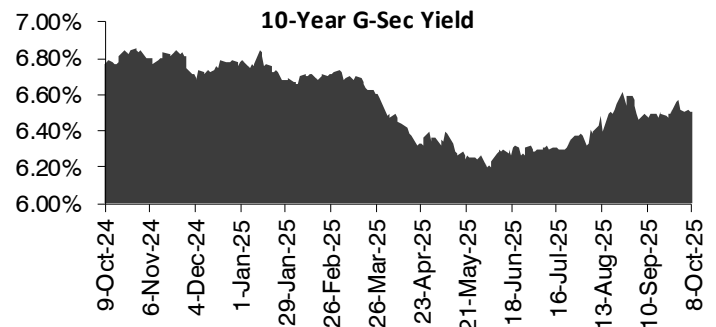
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.53	6.48	7.19	7.23	8.46	8.99
1 Year	5.58	6.62	7.33	7.37	8.60	9.13
3 Year	5.78	6.86	7.57	7.61	8.84	9.37
5 Year	6.11	6.90	7.71	7.74	8.98	9.51
10 Year	6.51	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 07-Oct	MF Inv 06-Oct
Buy	333	15,306
Sell	891	16,475
Net	-558	-1,169
Net (MTD)	1,100	9,496
Net (YTD)	10,041	-459,900

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

- Adani Enterprises will raise up to Rs 3,000 crore through the issue of non-convertible debentures.
- Anant Raj Ltd company's board approved a qualified institutional placement (QIP) of equity shares with a floor price of Rs 695.83.
- Venus Pipes & Tubes raised Rs 71.4 crore by converting 4.2 lakh warrants to support its expansion plans.
- Rubicon Research has mobilised Rs 619 crore from anchor investors, ahead of its initial share-sale opening for public subscription.



Global market indices	08-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46601.78	0.00	2.39	10.95	10.74
Nikkei 225	47734.99	-0.45	9.37	34.02	22.59
FTSE	9548.87	0.69	3.55	11.26	16.58
Hang Seng	26829.46	-0.48	4.66	16.05	28.21
Taiwan	27063.68	-0.54	10.25	30.77	19.69

Global debt	08-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.13	4.14	4.05	4.42	4.23	4.04
UK 10-Year (%)	4.70	4.72	4.61	4.63	4.68	4.19
German 10-Year (%)	2.68	2.71	2.64	2.64	2.73	2.25
Japan 10-Year (%)	1.70	1.67	1.55	1.49	1.49	0.93

Domestic	08-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	122098	1.80	13.01	36.94	61.24
Silver (Rs / Kg)	152700	2.18	22.74	51.35	68.89
Aluminium (Rs / kg)	263	0.59	2.40	4.60	9.92
Copper (Rs / kg)	1008	0.95	11.01	12.16	18.92
Lead (Rs / kg)	185	0.54	1.40	-0.94	-5.33
Zinc (Rs /Kg)	298	0.68	7.21	8.62	4.20
Nickel (Rs / kg)	1364	0.68	0.77	-3.60	-8.32

Global	08-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3980.40	0.72	10.97	28.35	50.58
Silver (oz/\$)	4778.00	-1.73	16.51	40.04	50.96
Brent (\$/bbl)	66.25	1.22	0.35	-11.39	-14.16
NYMEX crude (\$/bbl)	62.55	1.33	0.47	-12.49	-14.98

Global markets

- Wall Street stocks ended mixed on Wednesday with Nasdaq closing higher buoyed by rally in tech stocks while Dow Jones ended flat due to lack of economic data during the government shutdown.
- 10-year US bond yield ended almost flat at 4.15% due to lack of economic data amid government shutdown.
- FTSE index ended higher on Wednesday buoyed by gains in financial stocks.
- Asian markets were trading mixed at 8.30 AM.
- UK RICS house price balance rose 4 points to -15 in September 2025, marking the first improvement in four months from -19% in August.
- Japan Economy Watchers Survey index increased to 47.1 in September 2025 compared to 46.7 in August 2025.
- Japan Economy Watchers Survey Outlook increased to 48.5 in September compared to 47.5 in August 2025.

Commodity

- Crude oil prices rose by 82 cents to \$62.55 a barrel on the NYMEX after investors viewed stalled progress on a Ukraine peace deal as sustaining sanctions against Russia.
- Domestic gold prices ended higher due to safe haven buying.

Forthcoming results

NA	NA
----	----

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 15	US Inflation Rate Sep	2.9%

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