

Daily Market Monitor

October 10, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	09-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25182	0.54	1.26	7.07	0.80
BSE Sensex	82172	0.49	1.32	6.15	0.87
BSE 100	26380	0.56	1.31	7.33	-0.54
BSE 200	11425	0.61	1.37	7.74	-1.43
BSE 500	36487	0.58	1.26	8.66	-1.92
BSE SmallCap	53064	0.18	0.07	13.78	-5.43
BSE MidCap	46198	0.75	1.09	11.24	-4.55
BSE LargeCap	9704	0.57	1.33	7.42	-0.84
Sectoral indices					
BSE IT	34986	1.02	0.80	-3.15	-18.71
BSE Oil & Gas	27400	0.42	6.06	9.02	-8.56
BSE FMCG	20135	0.31	-3.11	3.54	-11.32
BSE Auto	59335	0.16	-2.15	24.38	-0.76
BSE Bankex	63260	0.33	4.41	6.24	9.11
BSE Teck	17305	0.76	1.23	-0.26	-12.82
BSE Capital Goods	69225	0.78	3.16	10.36	-2.83
BSE Consumer Durable	59158	0.23	-4.46	8.78	-9.69

Turnover (Rs Cr)	09-Oct	08-Oct
BSE Cash	8139	7643
NSE Cash	92464	89603
NSE F&O	13766081	15750872

Rs. Cr (Equity)	FII Inv 08-Oct	MF Inv 06-Oct	DII Inv 09-Oct
Buy	10,950	11,478	11,964
Sell	10,212	8,120	11,020
Net	738	3,358	944
Net (MTD)	-471	6,186	9,736
Net (YTD)	-153,665	405,814	568,903

	09-Oct	1Day	Month ago	Year ago
USD	88.79	88.79	88.14	83.96
GBP	118.89	118.88	119.64	109.89
Euro	103.25	103.08	103.77	92.08
100 Yen	58.06	58.24	59.96	56.49

Indian markets

- Indian equity benchmarks closed higher on Thursday, led by gains in metal stocks following a rally in metal commodity prices and due to investors remaining cautiously optimistic with the corporate results in the second quarter of fiscal 2026.
- The top gainers were JSW Steel, Tata Steel, HCL Technologies, SBI Life Insurance and Sun Pharma, up 1.59-2.62%.
- The top losers were Axis Bank, Eicher Motors, Titan Company, TATA Consumer Products and Maruti Suzuki, down 0.17-1.12%.

Indian debt

- The interbank call money rate ended higher at 5.75% on Thursday compared to 4.95% on Wednesday.
- Government bond prices ended lower on Thursday due to selling pressure ahead of a weekly debt auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Thursday compared to 6.50% on Wednesday.

Indian Rupee

- The rupee ended flat against the US dollar on Thursday because the fall in the currency, owing to economic concerns and foreign outflows, was cut short by reports of the Reserve Bank of India intervention through dollar sales by state-run banks.

Regulatory

- The Securities and Exchange Board of India (Sebi) has issued circular for implementation revised block deal framework for stock exchanges, aiming to make the execution of large trades more transparent and efficient.

Economy and Government

- British Prime Minister Keir Starmer said India is on track to becoming the third largest economy by 2028, an economic superpower in the making, and the United Kingdom is "perfectly placed to be partners" on that journey.
- United Kingdom have signed a 350 million pound (\$468 million) contract to supply the Indian army with UK-manufactured lightweight missiles, as part of a deepening weapons and defence partnership between the two countries.
- The Delhi government has started a scheme to provide collateral-free loans to small businesses and women entrepreneurs, aiming to strengthen the national capital's economic growth.
- Union Minister Nitin Gadkari said the government is constructing 25 greenfield expressways, totalling 10,000 km across the country, at a cost of Rs 6 lakh crore.

Domestic Debt Market Indicators

Instrument	09-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	4.95%	5.00%	5.00%	7.00%	6.24%
3-Month T-Bill	5.43%	5.41%	5.46%	5.34%	6.34%	6.41%
6-Month T-Bill	5.52%	5.53%	5.59%	5.50%	6.47%	6.52%
1-year T-Bill	5.53%	5.53%	5.63%	5.55%	6.40%	6.52%
3-Month CD	5.95%	5.89%	5.85%	5.72%	7.00%	7.10%
6-Month CD	6.19%	6.20%	6.15%	6.03%	7.25%	7.37%
1-year CD	6.37%	6.37%	6.38%	6.20%	7.15%	7.54%
3-Month CP	6.53%	6.53%	6.58%	6.20%	7.25%	7.55%
6-Month CP	6.69%	6.67%	6.70%	6.40%	7.55%	7.75%
1-year CP	6.90%	6.90%	6.85%	6.65%	7.45%	7.80%
1-year Gilt	5.59%	5.58%	5.65%	5.58%	6.40%	6.55%
3-year Gilt	5.91%	5.91%	6.05%	5.83%	6.44%	6.65%
5-year Gilt	6.13%	6.11%	6.24%	6.08%	6.45%	6.69%
1-year AAA	6.62%	6.62%	6.77%	6.46%	7.29%	7.64%
3-year AAA	6.86%	6.86%	6.89%	6.64%	7.11%	7.46%
5-year AAA	6.90%	6.90%	6.94%	6.68%	7.11%	7.31%
10-year G-sec	6.52%	6.51%	6.49%	6.31%	6.58%	6.77%
Net LAF (Rs Cr)	129270	148046	265041	326719	-9354	129032
Forex reserves (\$ bn)	700.24	702.57	694.23	702.78	642.49	704.89

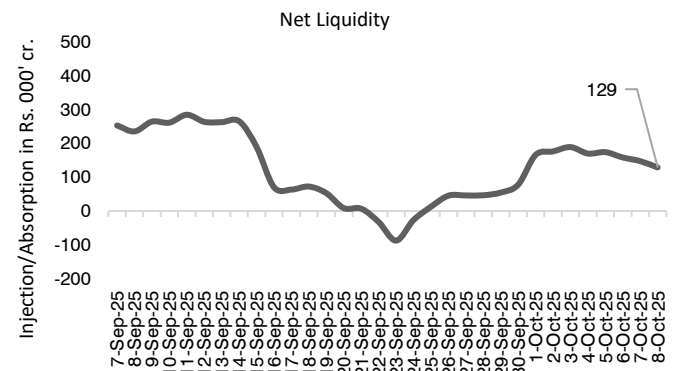
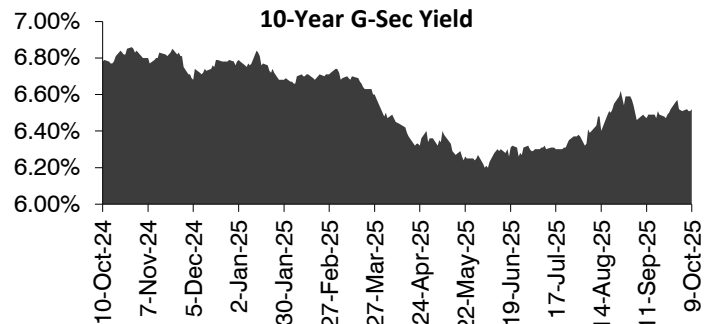
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.49	7.20	7.24	8.47	9.00
1 Year	5.59	6.62	7.33	7.37	8.60	9.13
3 Year	5.78	6.86	7.57	7.61	8.84	9.37
5 Year	6.13	6.90	7.71	7.74	8.98	9.51
10 Year	6.52	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 08-Oct	MF Inv 06-Oct
Buy	1,433	15,306
Sell	390	16,475
Net	1,044	-1,169
Net (MTD)	2,144	9,496
Net (YTD)	11,085	-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

- L&T bagged orders of more than Rs 15,000 crore for the Hydrocarbon Onshore Business.
- Graphcore, a UK chip firm, will invest \$1.3 billion in India over the next decade
- Revolut plans to invest over Rs 5,900 crore in India for the next five years to fuel new payment and forex products.
- Avaada Group inks MoU with the Gujarat government to invest Rs 36,000 crore across solar, wind, and battery energy storage system (BESS) projects in the state
- Hydrocarbon Onshore business wins Rs 15,000-cr order.
- NeoLiv to develop Rs 2,300 cr township project in Faridabad.
- VECV to invest Rs 544 crore in new automated manual transmissions plant.
- G R Infra wins Rs 290-crore Jharkhand State Highways order.
- Saya Group has formed a joint venture to develop a luxury housing project in Ghaziabad and will invest Rs 550 crore in the construction of 264 flats.
- Garuda Construction secured Rs 144 cr-deal from Orbit Ventures Developers for civil Work of redevelopment project.
- Panacea Biotec bags Rs 127 crore order for oral polio vaccines.
- Canara HSBC Life Insurance Company Ltd on Thursday said it has raised a little over Rs 750 crore from anchor investors



Global market indices	09-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46358.42	-0.52	1.42	10.37	9.05
Nikkei 225	48580.44	1.77	11.78	36.39	23.68
FTSE	9509.4	-0.41	2.89	10.80	15.35
Hang Seng	26752.59	-0.29	3.14	15.71	29.63
Taiwan	27301.92	0.88	9.84	31.92	20.49

Global debt	09-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.14	4.13	4.08	4.34	4.23	4.06
UK 10-Year (%)	4.75	4.70	4.62	4.60	4.68	4.18
German 10-Year (%)	2.70	2.68	2.66	2.63	2.73	2.26
Japan 10-Year (%)	1.69	1.70	1.59	1.51	1.49	0.93

Domestic	09-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	122629	0.43	12.02	37.53	63.49
Silver (Rs / Kg)	159500	4.45	27.84	58.09	79.90
Aluminium (Rs / Kg)	267	1.54	3.88	6.22	13.45
Copper (Rs / kg)	1013	0.50	11.45	12.71	21.02
Lead (Rs / kg)	188	1.62	1.82	0.67	-3.91
Zinc (Rs /Kg)	301	0.84	8.68	9.53	6.71
Nickel (Rs / kg)	1374	0.74	2.13	-2.89	-7.71

Global	09-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4048.57	1.71	11.34	30.55	54.39
Silver (oz/\$)	4942.00	3.43	19.66	44.84	61.08
Brent (\$/bbl)	65.22	-1.55	-1.76	-12.77	-14.83
NYMEX crude (\$/bbl)	61.51	-1.66	-1.79	-13.95	-16.02

Global markets

- Wall Street stocks ended lower on Thursday due to profit booking ahead of third quarter earnings season amid lack of fresh economic cues.
- 10-year US bond yield ended mostly flat at 4.14% amid lack of fresh economic cues.
- FTSE ended lower on Thursday due to profit booking ahead of third quarter earnings season amid lack of fresh economic cues.
- Asian markets were trading higher at 8.30 AM.
- Japan's machine tool orders rose by 9.9% year-on-year to JPY 137,780 million in September 2025, accelerating from an 8.1% advance in the previous month.

Commodity

- Crude oil prices fell by \$1.04 to \$61.51 a barrel on the NYMEX amid signs of easing Middle East tensions and profit booking.
- Domestic gold prices ended higher as ongoing US government shutdown has fueled uncertainty in the market.

Forthcoming results

NA	NA
----	----

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 16	UK GDP Aug	1.4%

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