

Domestic Market Performance

Indian market indices	10-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25285	0.41	1.25	7.51	1.15
BSE Sensex	82501	0.40	1.32	6.57	1.09
BSE 100	26497	0.44	1.24	7.81	-0.06
BSE 200	11469	0.39	1.23	8.17	-0.99
BSE 500	36630	0.39	1.09	9.09	-1.51
BSE SmallCap	53379	0.59	-0.05	14.45	-5.28
BSE MidCap	46362	0.36	0.61	11.63	-3.86
BSE LargeCap	9741	0.38	1.25	7.83	-0.47
Sectoral indices					
BSE IT	34985	0.00	-1.64	-3.15	-17.83
BSE Oil & Gas	27363	-0.13	5.51	8.87	-8.69
BSE FMCG	20231	0.48	-3.21	4.03	-10.52
BSE Auto	59626	0.49	-0.47	24.99	-0.58
BSE Bankex	63873	0.97	4.71	7.27	8.95
BSE Teck	17316	0.06	-0.29	-0.19	-12.00
BSE Capital Goods	69553	0.47	1.74	10.89	-2.73
BSE Consumer Durable	59578	0.71	-3.57	9.56	-8.73

Turnover (Rs Cr)	10-Oct	09-Oct
BSE Cash	7210	8139
NSE Cash	94005	92464
NSE F&O	19929803	13766081

Rs. Cr (Equity)	FII Inv 09-Oct	MF Inv 08-Oct	DII Inv 10-Oct
Buy	12,396	8,243	12,168
Sell	9,990	8,973	10,540
Net	2,407	-730	1,628
Net (MTD)	1,935	4,489	11,364
Net (YTD)	-151,258	404,118	570,531

	10-Oct	1Day	Month ago	Year ago
USD	88.69	88.79	88.13	83.97
GBP	118.01	118.89	119.25	109.82
Euro	102.62	103.25	103.20	91.81
100 Yen	58.02	58.06	59.75	56.41

Indian markets

- Indian equity benchmarks closed higher on Friday, supported by gains in financial stocks amid prospects of foreign investors turning buyers and optimism ahead of quarterly earnings.
- The top gainers were Cipla, State Bank of India, Maruti Suzuki, Bajaj Auto and Dr Reddys Labs, up 1.47-3.22%.
- The top losers were Tata Steel, TCS, HDFC Life, Tech Mahindra, and JSW Steel, down 0.63-1.45%.

Indian debt

- The interbank call money rate ended lower at 5.00% on Friday compared to 5.75% on Thursday.
- Government bond prices ended flat on Friday after the auction and participants were looking for strong triggers to revive appetite.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.52% on Friday.

Indian Rupee

- The rupee closed higher against the US dollar on Friday, supported by a strong domestic equity performance and a weakness in crude oil prices.

Regulatory

- The Reserve Bank of India (RBI) announced the consolidation of its existing regulatory instructions issued up to October 9, 2025, into 238 master circulars across 11 categories of regulated entities and covering 30 thematic areas.
- Sebi has streamlined the penalty framework for stockbrokers, removing 40 violations and reclassifying penalties for 105 violations as 'financial disincentives'.

Economy and Government

- UK-based business management platform Tide is significantly expanding its commitment to India with a £500 million investment over five years, starting in 2026.
- The government made it mandatory for importers of certain products which are exclusively used for solar energy projects to register on the renewable energy equipment import monitoring system.
- India plans to open up its electricity retail market for private companies, ending the dominance of state-run distributors in some states.
- Delhi government's upcoming EV policy is expected to double two-wheeler subsidies, expand charging infrastructure, and offer tax perks for scrapping ICE vehicles.

## Domestic Debt Market Indicators

Instrument	10-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.75%	5.00%	4.90%	7.00%	5.75%
3-Month T-Bill	5.43%	5.43%	5.49%	5.32%	6.34%	6.42%
6-Month T-Bill	5.52%	5.52%	5.61%	5.48%	6.47%	6.53%
1-year T-Bill	5.55%	5.53%	5.64%	5.54%	6.40%	6.51%
3-Month CD	5.95%	5.95%	5.88%	5.75%	7.00%	7.10%
6-Month CD	6.19%	6.19%	6.18%	6.00%	7.25%	7.37%
1-year CD	6.37%	6.37%	6.39%	6.21%	7.15%	7.48%
3-Month CP	6.55%	6.53%	6.58%	6.20%	7.25%	7.55%
6-Month CP	6.72%	6.69%	6.70%	6.35%	7.55%	7.70%
1-year CP	6.90%	6.90%	6.87%	6.65%	7.45%	7.80%
1-year Gilt	5.58%	5.59%	5.62%	5.56%	6.40%	6.57%
3-year Gilt	5.91%	5.91%	6.05%	5.81%	6.44%	6.64%
5-year Gilt	6.14%	6.13%	6.25%	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	6.53%	6.52%	6.48%	6.32%	6.58%	6.78%
Net LAF (Rs Cr)	155851	129270	261936	315352	-9354	134491
Forex reserves (\$ bn)	699.96	700.24	694.23	702.78	642.49	704.89

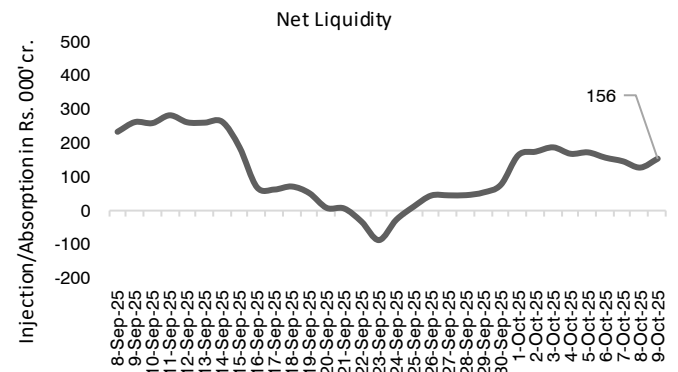
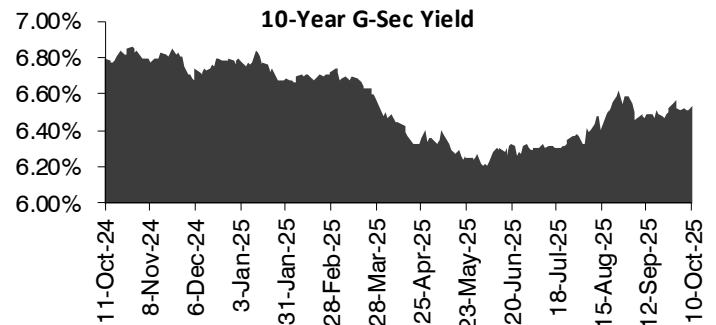
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.49	7.20	7.24	8.47	9.00
1 Year	5.58	6.62	7.33	7.37	8.60	9.13
3 Year	5.75	6.86	7.57	7.61	8.84	9.37
5 Year	6.14	6.90	7.71	7.74	8.98	9.51
10 Year	6.53	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 09-Oct	MF Inv 08-Oct
Buy	209	12,402
Sell	425	14,794
Net	-216	-2,392
Net (MTD)	1,928	6,172
Net (YTD)	10,869	-463,224

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

- Andhra allots 6,000 acres to BPCL for Rs 96,000 cr refinery near port
- Kolte-Patil acquires 7.5-acre land parcel with GDV of Rs 1,400 cr in Pune.
- Afcons Infrastructure bagged a contract for civil and allied infrastructure works of Rs 576 crore, including GST.
- Capacite Infraprojects received Rs 542-crore order from IIT Bombay.
- Truhome Finance secures Rs 417 cr fresh capital infusion from Warburg Pincus
- Vascon Engineers bagged Rs 161 crore redevelopment project in Mahalaxmi, Mumbai.
- Jubilant Pharmova arm to invest \$300 mn in US by FY28 to double sterile injectable capacity.
- TCS launches a \$6B AI data centre initiative, marking a strategic pivot to co-location AI infrastructure.
- Prosus buys 10% stake in Ixigo parent for Rs 1,295 crore.



Global market indices	10-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	45479.6	-1.90	-0.02	8.28	7.13
Nikkei 225	48088.8	-1.01	9.70	35.01	22.11
FTSE	9427.47	-0.86	2.19	9.84	14.44
Hang Seng	26290.32	-1.73	0.34	13.71	23.71
Taiwan	Closed	NA	NA	NA	NA

Global debt	10-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.05	4.14	4.04	4.35	4.23	4.09
UK 10-Year (%)	4.67	4.75	4.63	4.60	4.68	4.22
German 10-Year (%)	2.63	2.70	2.65	2.66	2.73	2.25
Japan 10-Year (%)	1.69	1.69	1.57	1.49	1.49	0.95

Domestic	10-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	121525	-0.90	10.85	36.29	62.38
Silver (Rs / Kg)	164500	3.13	32.03	63.05	86.18
Aluminium (Rs / Kg)	267	-0.04	4.16	6.18	13.50
Copper (Rs / kg)	1005	-0.74	11.10	11.88	21.38
Lead (Rs / kg)	185	-1.78	0.35	-1.13	-3.91
Zinc (Rs /Kg)	297	-1.16	7.03	8.26	5.54
Nickel (Rs / kg)	1356	-1.30	1.11	-4.15	-8.24

Global	10-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3985.23	-1.56	9.39	28.51	52.79
Silver (oz/\$)	5018.00	1.54	22.75	47.07	64.58
Brent (\$/bbl)	62.73	-3.82	-7.05	-16.10	-20.99
NYMEX crude (\$/bbl)	58.90	-4.24	-7.49	-17.60	-22.35

## Global markets

- Wall Street stocks closed lower on Friday US President announced 100% tariffs on Chinese imports and new export controls on US software, deepening trade tensions.
- 10-year US bond yield ended lower at 4.05% amid rising demand for safe haven bond with US government made it into its 10th day and after US threatened massive increase in tariff for China.
- FTSE index closed lower on Friday after US President warned of a 'massive increase' in tariffs on Chinese imports.
- Asian markets were trading higher at 8.30 AM.
- US University of Michigan's inflation expectations eased for the second month to 4.6% in October 2025, from 4.7% in September.
- China's trade surplus came in at \$90.45 billion in September 2025 higher than the \$81.69 billion recorded in the same month a year earlier.
- Japan's producer prices rose 2.7% year-on-year in September 2025, keeping the same pace as in the previous month.

## Commodity

- Crude oil prices fell by \$2.61 to \$58.90 a barrel on the NYMEX as US President's tariff threats against China fueled demand concerns.
- Domestic gold prices ended higher due to weakness in dollar index against its major trading partners.

## Forthcoming results

Date	Company
11-Oct	Avenue Supermarts
13-Oct	HCL Technologies
14-Oct	Tech Mahindra Ltd.
15-Oct	Axis Bank
15-Oct	Indian Railway Finance Corporation
15-Oct	HDFC Life Insurance Company

## Upcoming market indicators

Date	Indicator	Previous
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%
Oct 17	US Building Permits MoM Prel Sep	-2.3%

**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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