

Domestic Market Performance

Indian market indices	13-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25227	-0.23	0.45	7.26	1.05
BSE Sensex	82327	-0.21	0.52	6.35	1.16
BSE 100	26449	-0.18	0.51	7.61	-0.16
BSE 200	11447	-0.20	0.50	7.95	-1.17
BSE 500	36560	-0.19	0.39	8.88	-1.73
BSE SmallCap	53147	-0.43	-0.75	13.96	-6.10
BSE MidCap	46277	-0.18	0.20	11.43	-4.46
BSE LargeCap	9722	-0.19	0.48	7.62	-0.56
Sectoral indices					
BSE IT	34672	-0.90	-2.26	-4.02	-19.04
BSE Oil & Gas	27311	-0.19	4.10	8.66	-9.44
BSE FMCG	20063	-0.83	-3.48	3.16	-11.28
BSE Auto	59537	-0.15	-0.71	24.80	-0.28
BSE Bankex	63944	0.11	4.07	7.39	9.75
BSE Teck	17242	-0.43	-0.87	-0.62	-12.78
BSE Capital Goods	68963	-0.85	-1.05	9.95	-3.66
BSE Consumer Durable	59206	-0.62	-3.97	8.87	-9.75

Turnover (Rs Cr)	13-Oct	10-Oct
BSE Cash	7100	7210
NSE Cash	91723	94005
NSE F&O	26806388	19929803

Rs. Cr (Equity)	FII Inv 10-Oct	MF Inv 08-Oct	DII Inv 13-Oct
Buy	146	8,243	14,387
Sell	243	8,973	12,189
Net	-97	-730	2,198
Net (MTD)	1,838	4,489	13,562
Net (YTD)	-151,356	404,118	572,729

	13-Oct	1Day	Month ago	Year ago
USD	88.78	88.69	88.28	84.07
GBP	118.64	118.01	119.66	109.89
Euro	103.21	102.62	103.60	91.98
100 Yen	58.48	58.02	59.87	56.45

Indian markets

- Indian equity benchmarks closed lower on Monday, weighed down by losses in IT shares as renewed trade tensions between the US and China dampened investor sentiments.
- The top losers were Tata Motors, Infosys, HUL, Wipro and Max Healthcare, down 1.13-2.68%.
- The top gainers were Adani Ports, Bajaj Auto, Bajaj Finance, Shriram Finance and Interglobe Aviation, up 0.92-2.11%.

Indian debt

- The interbank call money rate ended higher at 5.50% on Monday compared to 5.00% on Friday.
- Government bond prices ended flat on Monday after softer inflation data and lower than expected state debt supply.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.52% on Monday.

Indian Rupee

- The rupee ended lower against the United States (US) dollar on Monday due to rising crude oil prices and a strong greenback amid global trade escalations.

Regulatory

- The Reserve Bank said banks in India and their overseas branches have been permitted to lend in Indian Rupees to persons resident in Bhutan, Nepal, and Sri Lanka to facilitate cross-border trade transactions.
- The board of retirement fund body EPFO approved liberalised part withdrawals for its more than seven crore subscribers, allowing up to 100 per cent EPF withdrawal.

Economy and Government

- India's consumer price inflation eased to 1.54% in September 2025, compared to 2.07% in August 2025.
- Fitch said the Reserve Bank of India's (RBI's) proposal to lower risk weights on financing operational infrastructure assets may help free up regulatory capital for Tata Capital Ltd (TCL).
- Data released by the Central Board of Direct Taxes said India's net direct tax collections grew 6.33% year-on-year to Rs 11.89 lakh crore in the April 1-October 12 period.
- The government opened the PM Gati Shakti portal to the private sector to help them optimise last-mile delivery services and develop infrastructure-based applications.

Domestic Debt Market Indicators

Instrument	13-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.50%	5.00%	4.95%	5.00%	7.00%	5.85%
3-Month T-Bill	5.43%	5.43%	5.50%	5.38%	6.34%	6.42%
6-Month T-Bill	5.52%	5.52%	5.60%	5.52%	6.47%	6.52%
1-year T-Bill	5.54%	5.55%	5.64%	5.56%	6.40%	6.52%
3-Month CD	5.92%	5.95%	5.87%	5.75%	7.00%	7.10%
6-Month CD	6.18%	6.19%	6.16%	6.00%	7.25%	7.35%
1-year CD	6.38%	6.37%	6.42%	6.21%	7.15%	7.46%
3-Month CP	6.55%	6.55%	6.60%	6.20%	7.25%	7.43%
6-Month CP	6.71%	6.72%	6.75%	6.35%	7.55%	7.70%
1-year CP	6.90%	6.90%	6.90%	6.65%	7.45%	7.80%
1-year Gilt	5.59%	5.58%	5.62%	5.58%	6.40%	6.57%
3-year Gilt	5.90%	5.91%	6.03%	5.82%	6.44%	6.65%
5-year Gilt	6.16%	6.14%	6.25%	6.08%	6.45%	6.69%
1-year AAA	6.63%	6.62%	6.77%	6.46%	7.29%	7.59%
3-year AAA	6.86%	6.86%	6.89%	6.64%	7.11%	7.41%
5-year AAA	6.90%	6.90%	6.96%	6.68%	7.11%	7.31%
10-year G-sec	6.52%	6.53%	6.49%	6.30%	6.58%	6.79%
Net LAF (Rs Cr)	155159	155851	264324	331620	-9354	180160
Forex reserves (\$ bn)	699.96	700.24	698.27	699.74	642.49	701.18

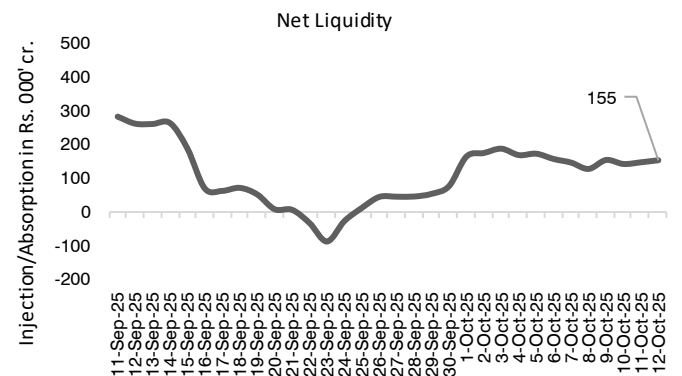
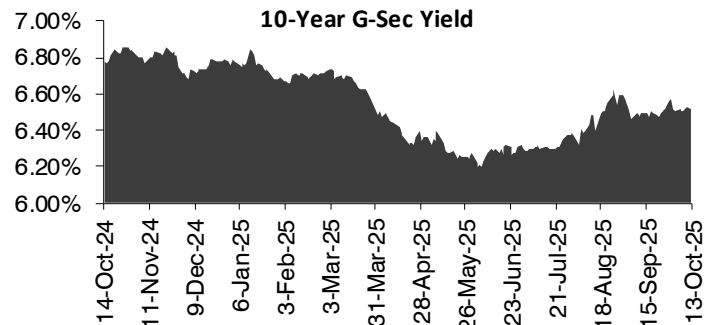
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.49	7.20	7.24	8.47	9.00
1 Year	5.59	6.63	7.34	7.38	8.61	9.14
3 Year	5.76	6.86	7.57	7.61	8.84	9.37
5 Year	6.16	6.90	7.71	7.74	8.98	9.51
10 Year	6.52	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 10-Oct	MF Inv 08-Oct
Buy	446	12,402
Sell	367	14,794
Net	79	-2,392
Net (MTD)	2,007	6,172
Net (YTD)	10,948	-463,224

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.54% (Sep-25)	2.10% (Jun-25)	9.24% (Sep-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#	57.7 (Sep-25)	59.3 (Aug-25)	56.5 (Sep-24)
India Service PMI#	60.9 (Sep-25)	62.5 (Aug-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

- Bharti Telecom plans to raise up to Rs 10,500 crore through the sale of bonds maturing in two years, and three years and two months.
- Aurobindo Pharma's promoter group raised around Rs 2,000 crore through a two-tranche promoter financing structure to fund platform acquisitions.
- SpeakX raised \$16 million from WestBridge and pivots to an English-learning app.



Global market indices	13-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46067.58	1.29	0.51	9.68	7.47
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	9442.87	0.16	1.72	10.02	14.41
Hang Seng	25889.48	-1.52	-1.89	11.98	21.82
Taiwan	26923.42	-1.39	5.69	30.09	17.56

Global debt	13-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.05	4.05	4.06	4.43	4.23	4.08
UK 10-Year (%)	4.65	4.67	4.66	4.63	4.68	4.21
German 10-Year (%)	2.63	2.63	2.71	2.69	2.73	2.27
Japan 10-Year (%)	1.69	1.69	1.60	1.50	1.49	0.96

Domestic	13-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	124155	2.16	13.17	39.24	64.18
Silver (Rs / Kg)	175325	6.58	36.96	73.77	94.89
Aluminium (Rs / Kg)	264	-0.90	1.07	5.22	10.20
Copper (Rs / kg)	990	-1.49	7.70	10.21	17.86
Lead (Rs / kg)	188	2.09	2.73	0.94	-4.22
Zinc (Rs /Kg)	296	-0.42	4.05	7.80	1.98
Nickel (Rs / kg)	1355	-0.10	0.04	-4.25	-9.29

Global	13-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4017.18	0.80	10.52	29.54	52.58
Silver (oz/\$)	5009.00	-0.18	20.38	46.81	60.80
Brent (\$/bbl)	63.32	0.94	-5.48	-15.31	-19.89
NYMEX crude (\$/bbl)	59.49	1.00	-5.10	-16.77	-21.27

Global markets

- Wall Street stocks closed higher on Monday led by gains in chipmakers after the US President struck a conciliatory tone on US-China trade tensions.
- 10-year US bond yield ended flat at 4.05% as investors remained on the edge due to government shut down and trade tariff related announcements.
- FTSE index closed higher on Monday boosted by gains in mining stocks after the US President toned down his trade rhetoric with China.
- Asian markets were trading higher at 8.30 AM.

Commodity

- Crude oil prices rose by 59 cents to \$59.49 a barrel on the NYMEX on hopes ahead of US-China meeting eased trade tensions.
- Domestic gold prices ended higher due to escalating US trade tariff tensions.

Forthcoming results

Date	Company
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 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%
Oct 20	China GDP rate, Q3	5.2%

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	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24
Debt Indicators	Currency in circulation (Rs billion)	38071	38097	38147	38372	38344	37762	36997	36444	35893	35643
	Repo rate	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%
	10-year G-sec yield	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%
	Call rate	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%
	Forex reserves (\$ billion; mthly. avg.)	701	693	698	699	689	682	656	638	629	648
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18	1773.1	2554.5	674.95
	IIP, %y/y	NA	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%
	Exports, \$ billion	NA	35.1	37.24	35.14	38.73	38.49	41.97	36.91	36.43	38.01
	Imports, \$ billion	NA	61.59	64.59	53.92	60.61	64.91	63.51	50.96	59.42	59.95
	Manufacturing PMI	57.7	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7	56.4
	Services PMI	60.9	62.9	60.5	60.4	58.8	58.7	58.5	59	56.5	59.3
	GST collections (Rs crore)	189017	186315	195735	184597	201050	236716	196141	183646	195506	176857
	India crude oil import (mbpd)	NA	19.6	18.56	20.32	21.3	21.0	22.7	19.1	21.2	20.2
Sector update	Auto – Passenger vehicles	NA	-9%	0%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%	9.8%
	Auto – Two-wheelers	NA	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%
	Auto – Commercial vehicles	NA	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%
	Auto – Tractors	NA	28%	8%	10.50%	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%
	Infra – Coal	NA	11.40%	-12.30%	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%
	Infra – Electricity	NA	3.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%	6.2%
	Infra – Steel	NA	14.20%	16.60%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%	7.3%
	Infra – Cement	NA	6.10%	11.60%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%	10.3%

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