

Domestic Market Performance

Indian market indices	14-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25146	-0.32	0.13	6.91	0.07
BSE Sensex	82030	-0.36	0.15	5.96	0.07
BSE 100	26338	-0.42	0.09	7.16	-1.16
BSE 200	11396	-0.44	0.05	7.48	-2.12
BSE 500	36382	-0.49	-0.10	8.35	-2.66
BSE SmallCap	52644	-0.95	-1.69	12.88	-7.04
BSE MidCap	45934	-0.74	-0.54	10.60	-5.43
BSE LargeCap	9683	-0.40	0.08	7.19	-1.51
Sectoral indices					
BSE IT	34517	-0.45	-2.70	-4.45	-20.21
BSE Oil & Gas	27035	-1.01	3.05	7.57	-10.30
BSE FMCG	19961	-0.51	-3.97	2.64	-12.12
BSE Auto	59448	-0.15	-0.86	24.62	-0.60
BSE Bankex	63718	-0.35	3.70	7.01	8.24
BSE Teck	17171	-0.41	-1.28	-1.03	-13.90
BSE Capital Goods	68489	-0.69	-1.73	9.19	-4.96
BSE Consumer Durable	58536	-1.13	-5.06	7.64	-11.39

Turnover (Rs Cr)	14-Oct	13-Oct
BSE Cash	8825	7100
NSE Cash	109665	91723
NSE F&O	69217670	26806388

Rs. Cr (Equity)	FII Inv 13-Oct	MF Inv 10-Oct	DII Inv 14-Oct
Buy	12,630	9,067	15,335
Sell	9,074	7,621	12,311
Net	3,555	1,446	3,024
Net (MTD)	5,394	6,380	16,586
Net (YTD)	-147,800	406,009	575,753

	14-Oct	1Day	Month ago	Year ago
USD	88.79	88.78	88.28	84.05
GBP	118.08	118.64	119.66	109.73
Euro	102.80	103.21	103.60	91.87
100 Yen	58.50	58.48	59.87	56.26

Indian markets

- Indian equity benchmarks closed lower on Tuesday, weighed down by a decline in financial stocks amid persistent concerns over the renewed escalation of trade tensions between the US and China.
- The top losers were Tata Motors, Dr Reddy's Labs, Bharat Electronics, Bajaj Finance, and TCS, down 1.56-40.15%.
- The top gainers were Max Healthcare, Wipro, Tech Mahindra, Apollo Hospitals, and Power Grid Corporation of India, up 0.47-1.59%.

Indian debt

- The interbank call money rate ended lower at 5.40% on Tuesday compared to 5.50% on Monday.
- Government bond prices ended marginally higher on Tuesday due to lower state debt cut-offs and on easing inflation data ahead of the RBI's policy minutes.
- 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 lower against the US dollar on Tuesday tracking weakness in the domestic equity market and owing to a stronger greenback in the overseas market.

Regulatory

- The Competition Commission of India (CCI) approved Vedanta Limited's proposed acquisition of debt-laden Jaiprakash Associates Limited (JAL), marking a key step in the company's Rs 17,000 crore bid under the Insolvency and Bankruptcy Code (IBC) process.
- The Employees Provident Fund Organisation (EPFO) announced the 'Employees' Enrolment Scheme, 2025' (EES 2025).

Economy and Government

- India Wholesale Price Index (WPI)-linked inflation cooled to 0.13% in September 2025 compared to 0.52% in August 2025.
- The IMF's October 2025 World Economic Outlook (WEO) projects India's growth at 6.6% in 2025, up from 6.5% in 2024, before moderating slightly to 6.2% in 2026, signalling continued domestic momentum despite rising trade barriers.
- The growth rate of digital loans sanctioned is moderating in India, with around 30 million loans disbursed in the first quarter of financial year 2025-26 (FY26), having a cumulative value of Rs 43,019 crore.
- Finance Minister Nirmala Sitharaman said that various farmers' training and common facility centers for agro-processing have been set up across the Kalyana Karnataka region in seven districts, using the Members of Parliament Local Area Development Scheme (MPLADS).
- The Ministry of Finance said no exemption from customs duty or cess is required for importing machinery and equipment used in manufacturing rare-earth permanent magnets (REPM) under the proposed production-linked incentive (PLI) scheme.
- The Maharashtra cabinet approved its bamboo industry policy, which aims to attract an investment of Rs 50,000 crore and generate more than 5 lakh jobs.

Domestic Debt Market Indicators

Instrument	14-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.50%	4.95%	4.90%	7.00%	5.75%
3-Month T-Bill	5.43%	5.43%	5.50%	5.34%	6.34%	6.43%
6-Month T-Bill	5.52%	5.52%	5.60%	5.52%	6.47%	6.53%
1-year T-Bill	5.55%	5.54%	5.64%	5.55%	6.40%	6.50%
3-Month CD	5.93%	5.92%	5.87%	5.75%	7.00%	7.10%
6-Month CD	6.18%	6.18%	6.16%	5.97%	7.25%	7.40%
1-year CD	6.38%	6.38%	6.42%	6.20%	7.15%	7.46%
3-Month CP	6.49%	6.55%	6.60%	6.20%	7.25%	7.43%
6-Month CP	6.71%	6.71%	6.75%	6.35%	7.55%	7.70%
1-year CP	6.90%	6.90%	6.90%	6.61%	7.45%	7.80%
1-year Gilt	5.59%	5.59%	5.62%	5.58%	6.40%	6.55%
3-year Gilt	5.90%	5.90%	6.03%	5.81%	6.44%	6.64%
5-year Gilt	6.13%	6.16%	6.25%	6.08%	6.45%	6.69%
1-year AAA	6.63%	6.63%	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	6.51%	6.52%	6.49%	6.31%	6.58%	6.78%
Net LAF (Rs Cr)	129743	155159	264324	260951	-9354	150092
Forex reserves (\$ bn)	699.96	700.24	698.27	699.74	642.49	701.18

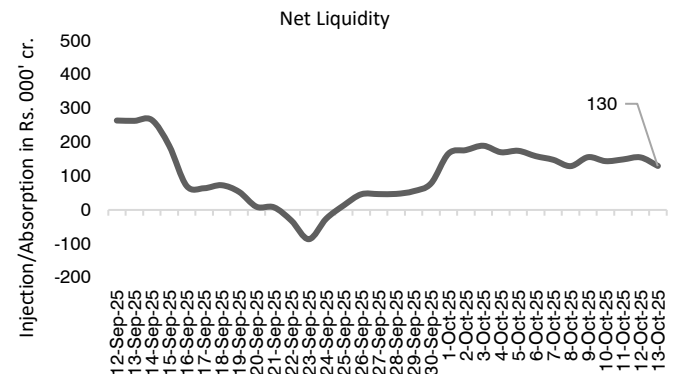
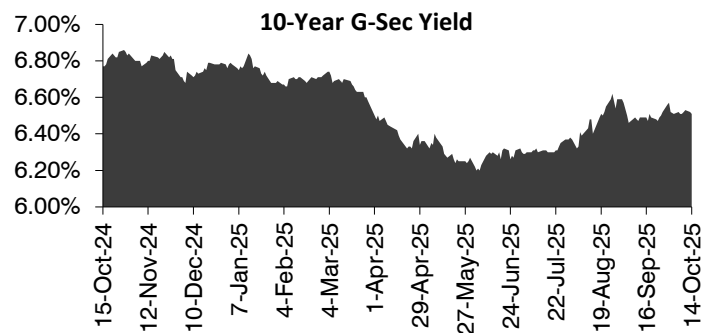
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.49	7.20	7.24	8.47	9.00
1 Year	5.59	6.63	7.34	7.38	8.61	9.14
3 Year	5.75	6.86	7.57	7.61	8.84	9.37
5 Year	6.13	6.90	7.71	7.74	8.98	9.51
10 Year	6.51	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 13-Oct	MF Inv 10-Oct
Buy	432	14,811
Sell	198	13,791
Net	234	1,020
Net (MTD)	2,241	3,546
Net (YTD)	11,182	-465,850

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

- Infosys secured a £1.2 billion (around Rs 14,137 crore) contract from the NHS Business Services Authority (NHSBSA) to deliver a new workforce management system, the company said in a regulatory filing.
- LT Foods agreed to acquire a 100% stake in Hungary-based Global Green Europe Kft for approximately 25 million euros (about Rs 256 crore) to expand its presence in the European packaged food market.
- Google would invest \$15 billion between 2026 and 2030 to set up an artificial intelligence (AI) hub and a gigawatt (Gw)-scale data centre in Visakhapatnam, Andhra Pradesh.
- KEC International has secured new orders of Rs 1,174 crore for Transmission & Distribution projects in India and the Middle East.



Global market indices	14-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46270.46	0.44	0.95	10.16	7.44
Nikkei 225	46847.32	-2.58	4.64	31.53	18.28
FTSE	9452.77	0.10	1.83	10.14	13.99
Hang Seng	25441.35	-1.73	-3.59	10.04	20.62
Taiwan	26793.15	-0.48	5.18	29.46	16.62

Global debt	14-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.03	4.05	4.06	4.43	4.23	4.10
UK 10-Year (%)	4.57	4.65	4.66	4.59	4.68	4.24
German 10-Year (%)	2.61	2.63	2.71	2.73	2.73	2.28
Japan 10-Year (%)	1.66	1.69	1.60	1.58	1.49	0.95

Domestic	14-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	126152	1.61	14.99	41.48	65.99
Silver (Rs / Kg)	178100	1.58	39.13	76.53	97.83
Aluminium (Rs / Kg)	264	-0.17	0.90	5.04	10.75
Copper (Rs / kg)	1004	1.41	9.23	11.77	20.38
Lead (Rs / kg)	185	-2.04	0.63	-1.13	-5.09
Zinc (Rs /Kg)	295	-0.17	3.87	7.62	2.89
Nickel (Rs / kg)	1351	-0.31	-0.27	-4.55	-9.04

Global	14-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4112.54	2.37	13.15	32.62	54.80
Silver (oz/\$)	5184.00	3.49	24.59	51.93	64.31
Brent (\$/bbl)	62.39	-1.47	-6.87	-16.56	-19.46
NYMEX crude (\$/bbl)	58.70	-1.33	-6.36	-17.88	-20.49

Global markets

- Wall Street stocks closed mixed on Tuesday with Dow Jones gaining supported by strong earnings and optimism over the economic outlook while Nasdaq declined following renewed trade tensions with China.
- 10-year US bond yield ended lower at 4.03% after Federal Reserve Chair Jerome Powell in his speech at the NABE meeting in Philadelphia left intact expectations for two more interest-rate cuts by the end of the year.
- FTSE index closed marginally higher on Tuesday as gains in consumer staples offset by losses in metal miners amid US-China trade tensions.
- Asian markets were trading higher at 8.30 AM.
- US NFIB Small Business Optimism Index fell to 98.8 in September 2025 compared to 100.8 in August 2025.
- UK unemployment rate rose to 4.8% in August 2025, compared to 4.7% in July 2025.
- China Inflation Rate eased 0.3% in September 2025, a compared to a 0.4% fall in August 2025.
- China producer prices dropped 2.3% in August 2025, compared to a 2.9% decline in July 2025.

Commodity

- Crude oil prices fell by 79 cents to \$58.70 a barrel on the NYMEX on the International Energy Agency oversupply warning and US-China trade worries.
- Domestic gold prices ended higher due to escalating US trade tariff tensions.

Forthcoming results

Date	Company
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 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%
Oct 21	India Infrastructure Output, Sep	6.3%

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	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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