

Daily Market Monitor

October 17, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	16-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25585	1.03	1.37	8.78	2.46
BSE Sensex	83468	1.04	1.32	7.82	2.41
BSE 100	26814	0.94	1.29	9.10	1.10
BSE 200	11594	0.86	1.09	9.35	0.03
BSE 500	36985	0.79	0.78	10.14	-0.82
BSE SmallCap	53304	0.47	-1.76	14.29	-7.14
BSE MidCap	46559	0.29	-0.21	12.11	-4.29
BSE LargeCap	9854	0.93	1.23	9.08	0.77
Sectoral indices					
BSE IT	34732	0.33	-2.26	-3.85	-18.58
BSE Oil & Gas	27397	0.41	3.58	9.00	-9.26
BSE FMCG	20512	1.74	-1.29	5.47	-9.79
BSE Auto	60270	1.15	-0.59	26.34	2.45
BSE Bankex	64748	1.27	4.50	8.74	10.16
BSE Teck	17303	0.19	-1.10	-0.27	-12.62
BSE Capital Goods	69238	0.22	-2.12	10.39	-4.30
BSE Consumer Durable	60134	1.51	-2.34	10.58	-9.16

Turnover (Rs Cr)	16-Oct	15-Oct
BSE Cash	10791	6699
NSE Cash	111717	100716
NSE F&O	14336421	12938452

Rs. Cr (Equity)	FII Inv 15-Oct	MF Inv 14-Oct	DII Inv 16-Oct
Buy	15,190	12,002	17,610
Sell	14,494	9,736	14,696
Net	696	2,265	2,914
Net (MTD)	5,513	8,631	23,993
Net (YTD)	-147,681	408,259	583,159

	16-Oct	1Day	Month ago	Year ago
USD	87.90	88.29	88.05	83.99
GBP	117.88	117.99	119.98	109.34
Euro	102.46	102.66	103.76	91.52
100 Yen	58.12	58.45	59.94	56.27

Indian markets

- Indian equity benchmarks closed higher on Thursday on buying in financial and consumer durable stocks, on the back of optimism over recovery in domestic earnings and renewed expectations of foreign investor inflows.
- The top gainers were Nestle, Tata Consumer Products, Kotak Mahindra Bank, Titan Company and Axis Bank, up 2.28-4.52%.
- The top losers were HDFC Life, Eternal, Shriram Finance, SBI Life Insurance and Infosys, down 0.20-2.40%.

Indian debt

- The interbank call money rate ended higher at 5.35% on Thursday compared to 5.00% on Wednesday.
- Government bond prices ended lower on Thursday as traders booked profits after the RBI's policy minutes signalled expectations of a December rate cut.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.49% on Thursday compared to 6.48% on Wednesday.

Indian Rupee

- The rupee ended higher against the US dollar on Thursday, post intervention by the Reserve Bank of India and weakness in the dollar index.

Regulatory

- The Reserve Bank of India (RBI) announced the final redemption price for Sovereign Gold Bond (SGB) 2017-18 Series-III. The final redemption date of the above tranche shall be October 16, 2025.
- The Employees' Provident Fund Organisation (EPFO) revised the withdrawal timeline for members who lose their jobs, extending the full withdrawal eligibility period from two months to 12 months of unemployment.
- The Labour Ministry and EPFO have clarified recent changes to EPF withdrawal and EPS pension rules, refuting claims of 'open theft'.

Economy and Government

- The Indian Railway Catering and Tourism Corporation (IRCTC) launched a new Bharat Gaurav Tourist Train package, the Rameswaram-Tirupati Dakshin Darshan Yatra, covering major temples and pilgrimage sites across South India.
- The Indian Venture and Alternate Capital Association (IVCA) has welcomed SEBI's decision to extend the deadline for Angel Funds to disclose allocation methodologies to January 31, 2026.

Domestic Debt Market Indicators

Instrument	16-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.00%	5.50%	4.90%	7.00%	6.40%
3-Month T-Bill	5.44%	5.44%	5.49%	5.35%	6.34%	6.45%
6-Month T-Bill	5.53%	5.51%	5.59%	5.52%	6.47%	6.53%
1-year T-Bill	5.52%	5.53%	5.62%	5.56%	6.40%	6.53%
3-Month CD	5.97%	5.93%	5.80%	5.76%	7.00%	7.14%
6-Month CD	6.18%	6.18%	6.15%	5.99%	7.25%	7.35%
1-year CD	6.40%	6.39%	6.40%	6.23%	7.15%	7.48%
3-Month CP	6.58%	6.49%	6.55%	6.17%	7.25%	7.43%
6-Month CP	6.75%	6.75%	6.75%	6.35%	7.55%	7.70%
1-year CP	6.94%	6.94%	6.90%	6.65%	7.45%	7.75%
1-year Gilt	5.59%	5.59%	5.63%	5.57%	6.40%	6.54%
3-year Gilt	5.87%	5.86%	6.03%	5.81%	6.44%	6.64%
5-year Gilt	6.14%	6.11%	6.23%	6.10%	6.45%	6.68%
1-year AAA	6.63%	6.63%	6.78%	6.46%	7.29%	7.55%
3-year AAA	6.84%	6.84%	6.96%	6.64%	7.11%	7.37%
5-year AAA	6.88%	6.88%	7.02%	6.68%	7.11%	7.27%
10-year G-sec	6.50%	6.48%	6.49%	6.31%	6.58%	6.77%
Net LAF (Rs Cr)	130191	127618	70579	311405	-9354	189761
Forex reserves (\$ bn)	699.96	700.24	698.27	699.74	642.49	701.18

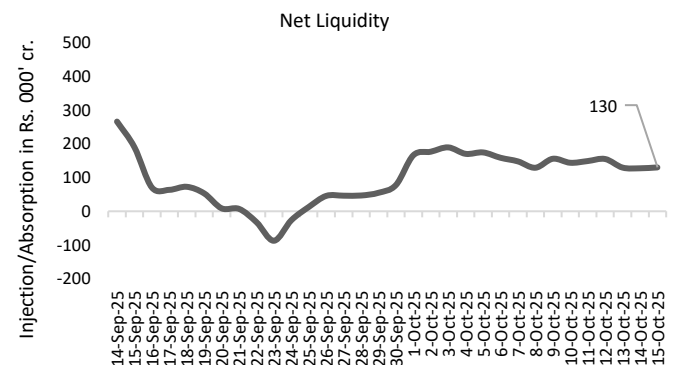
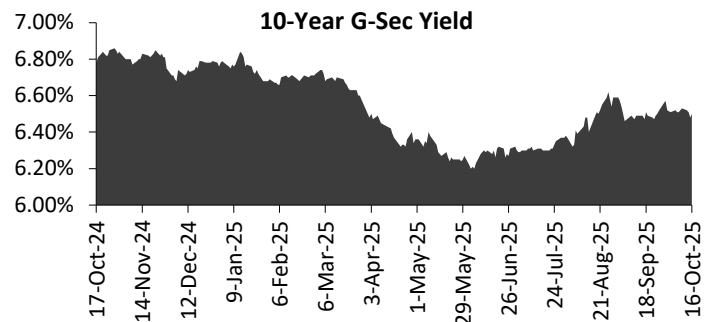
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.53	6.47	7.18	7.22	8.45	8.98
1 Year	5.59	6.63	7.34	7.38	8.61	9.14
3 Year	5.77	6.84	7.55	7.59	8.82	9.35
5 Year	6.14	6.88	7.69	7.72	8.96	9.49
10 Year	6.50	7.12	7.93	7.96	9.20	9.73

Rs. Cr (Debt)	FII Inv 15-Oct	MF Inv 14-Oct
Buy	1,671	15,673
Sell	144	14,746
Net	1,526	927
Net (MTD)	3,782	3,868
Net (YTD)	12,723	-465,528

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.54% (Sep-25)	2.10% (Jun-25)	5.49% (Sep-24)
WPI	0.13% (Sep-25)	-0.19% (Jun-25)	1.84% (Sep-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

- Graph AI raises \$3 million in seed funding to revolutionise pharmacovigilance.
- Zepto raised \$450 million (about Rs 3,757.5 crore) in a funding round led by the California Public Employees' Retirement System (CalPERS) at a valuation of \$7 billion.
- Duroflex filed its Draft Red Herring Prospectus (DRHP) with market regulator Securities and Exchange Board of India (Sebi).
- Life Insurance Corporation of India (LIC) has launched two new plans, LIC Jan Suraksha Plan (880) that caters to the lower income group people and LIC Bima Lakshmi Plan (881) exclusively for females. .



Global market indices	16-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	45952.24	-0.65	0.42	9.41	6.67
Nikkei 225	48277.74	1.27	7.52	35.54	23.22
FTSE	9436.09	0.12	2.61	9.94	13.29
Hang Seng	25888.51	-0.09	-2.08	11.98	27.61
Taiwan	27647.87	1.36	7.87	33.59	20.15

Global debt	16-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	3.99	4.05	4.04	4.46	4.23	4.02
UK 10-Year (%)	4.48	4.55	4.64	4.64	4.68	4.07
German 10-Year (%)	2.57	2.56	2.69	2.69	2.73	2.18
Japan 10-Year (%)	1.65	1.65	1.60	1.57	1.49	0.94

Domestic	16-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	127471	0.60	14.97	42.96	66.51
Silver (Rs / Kg)	168083	-3.40	29.99	66.60	83.67
Aluminium (Rs / Kg)	263	-0.32	0.44	4.84	9.97
Copper (Rs / kg)	993	-0.34	7.75	10.49	20.60
Lead (Rs / kg)	185	-0.67	-2.17	-0.94	-4.22
Zinc (Rs /Kg)	294	-0.17	2.51	6.98	1.61
Nickel (Rs / kg)	1350	-0.32	-0.37	-4.61	-8.36

Global	16-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4188.53	1.00	13.82	35.07	57.42
Silver (oz/\$)	5240.00	0.94	23.18	53.58	66.51
Brent (\$/bbl)	61.06	-1.37	-10.82	-18.34	-17.73
NYMEX crude (\$/bbl)	57.46	-1.39	-10.94	-19.61	-18.37

Global markets

- Wall Street stocks declined on Thursday led by fall in baking stocks and on persistent worries around US-China trade conflicts.
- 10-year US bond yield ended lower at 3.99% as signs of credit stress in smaller US lenders spurred demand for safer assets.
- FTSE index rose on Thursday due to rising bets of an interest rate cut from the Federal Reserve and on easing political concerns in France.
- Asian markets were trading higher at 8.30 AM.
- US Philadelphia Fed Manufacturing Index fell to a six-month low of -12.8 in October 2025, down sharply from 23.2 in September
- The British economy grew by 1.3% year-on-year in August 2025, compared to an upwardly revised 1.5% increase in July 2025.
- UK Industrial production fell by 0.7% year-on-year in August 2025, compared to the revised 0.1% drop in July 2025 while the manufacturing production decreased 0.8% from a revised 0.1%.
- UK construction output rose by 1.0% year-on-year in August 2025, compared to a downwardly revised 1.8% gain in July 2025.

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-China trade tariff tensions, festive demand in domestic market and weakness in the dollar index.

Forthcoming results

Date	Company
17-Oct	JSW Steel
17-Oct	Havells India
18-Oct	HDFC Bank
18-Oct	ICICI Bank
18-Oct	UltraTech Cement

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 22	UK Inflation Rate, Sep	3.8%
Oct 23	US Kansas Fed Manufacturing Index, October	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	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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