

Daily Market Monitor

October 28, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	27-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25966	0.66	5.32	10.40	7.38
BSE Sensex	84779	0.67	5.41	9.51	6.77
BSE 100	27177	0.67	5.29	10.58	6.66
BSE 200	11735	0.67	5.06	10.67	5.86
BSE 500	37421	0.67	4.90	11.44	5.53
BSE SmallCap	53789	0.51	2.88	15.33	2.78
BSE MidCap	46930	0.72	4.88	13.00	3.25
BSE LargeCap	9980	0.64	5.05	10.48	6.37
Sectoral indices					
BSE IT	35355	0.27	6.08	-2.13	-15.27
BSE Oil & Gas	27988	1.50	5.88	11.36	1.75
BSE FMCG	20714	0.21	2.80	6.51	-3.21
BSE Auto	60742	0.55	2.69	27.33	12.23
BSE Bankex	65513	0.65	6.70	10.03	13.01
BSE Teck	17824	0.88	7.16	2.74	-7.49
BSE Capital Goods	69419	0.14	1.57	10.67	4.50
BSE Consumer Durable	60991	0.34	4.94	12.15	-0.31

Turnover (Rs Cr)	27-Oct	24-Oct
BSE Cash	7388	6830
NSE Cash	96755	89132
NSE F&O	30822149	27864097

Rs. Cr (Equity)	FII Inv 24-Oct	MF Inv 15-Oct	DII Inv 27-Oct
Buy	12,056	11,999	13,669
Sell	11,489	8,514	11,246
Net	567	3,486	2,423
Net (MTD)	9,082	12,116	33,753
Net (YTD)	-144,112	411,745	592,919

	27-Oct	1Day	Month ago	Year ago
USD	88.06	87.71	88.72	84.08
GBP	117.39	116.85	118.50	109.14
Euro	102.42	101.79	103.62	91.01
100 Yen	57.58	57.33	59.24	55.31

Indian markets

- Indian equity benchmarks closed higher on Monday, after weaker-than-expected US inflation data boosted hopes for two additional rate cuts by the US Federal Reserve in 2025 and on optimism of a potential US-China trade deal.
- The top gainers were SBI Life Insurance, Grasim Industries, Bharti Airtel, Reliance Industries and Eternal, up 2.17-3.44%.
- The top losers were Kotak Mahindra Bank, Bharat Electronics, Infosys, Oil and Natural Gas Corporation, and Adani Ports, down 0.59-1.76%.

Indian debt

- The interbank call money rate ended lower at 4.95% on Monday compared to 5.72% on Friday.
- Government bond prices fell on Monday as investors were cautious ahead of the state debt auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.55% on Monday compared to 6.54% on Friday.

Indian Rupee

- The rupee ended lower against the US dollar on Monday, amid weakness in the Dollar Index and optimism with regard to a potential China-US trade deal.

Regulatory

- Reserve Bank of India (RBI) Deputy Governor Swaminathan Janakiraman said to address challenges such as information asymmetry, financial literacy gaps, and delayed payments, the focus should be on promoting wider adoption of digital solutions.
- SEBI proposed incentives for certain categories of retail investors to encourage them to invest in public issues of debt securities
- The Securities and Exchange Board of India (Sebi) plans to raise the threshold for identifying high value debt listed entities (HVDLEs) to Rs 5,000 crore from the existing Rs 1,000 crore to reduce the compliance burden for such companies.
- The International Financial Services Centres Authority (IFSCA) has issued a consultation paper on regulatory framework for dematerialization of securities by entities in the IFSC jurisdiction.

Economy and Government

- The finance ministry maintained a strong growth outlook for FY26 amid uncertain global conditions, supported by a positive demand outlook due to GST reforms, favourable monsoons, lower inflation, and monetary easing.
- The government approved seven projects under the Electronics Component Manufacturing Scheme (ECMS), involving investments worth Rs 5,532 crore and a total production target of Rs 44,406 crore.
- The Chhattisgarh government plans to set up four new medical colleges with an investment of about Rs 1300 crore, taking the total of such institutes in the state to 19.
- The Coal Ministry issued draft guidelines for the preparation of mining and mine closure plans for underground coal and lignite gasification (UCG) blocks, mandating a pilot feasibility study, real-time groundwater monitoring, and an escrow fund for mine closure.

Domestic Debt Market Indicators

Instrument	27-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.72%	5.57%	5.00%	7.00%	5.95%
3-Month T-Bill	5.48%	5.45%	5.48%	5.36%	6.34%	6.50%
6-Month T-Bill	5.56%	5.57%	5.56%	5.49%	6.47%	6.58%
1-year T-Bill	5.53%	5.54%	5.56%	5.54%	6.40%	6.58%
3-Month CD	6.00%	6.05%	5.90%	5.74%	7.00%	7.19%
6-Month CD	6.24%	6.24%	6.15%	6.00%	7.25%	7.40%
1-year CD	6.42%	6.43%	6.40%	6.23%	7.15%	7.50%
3-Month CP	6.60%	6.53%	6.57%	6.15%	7.25%	7.50%
6-Month CP	6.79%	6.79%	6.68%	6.30%	7.55%	7.80%
1-year CP	6.94%	6.94%	6.88%	6.65%	7.45%	7.90%
1-year Gilt	5.59%	5.59%	5.61%	5.58%	6.40%	6.62%
3-year Gilt	5.89%	5.87%	5.93%	5.85%	6.44%	6.75%
5-year Gilt	6.17%	6.15%	6.20%	6.09%	6.45%	6.76%
1-year AAA	6.67%	6.67%	6.72%	6.50%	7.29%	7.57%
3-year AAA	6.86%	6.86%	6.96%	6.68%	7.11%	7.37%
5-year AAA	6.90%	6.90%	7.00%	6.72%	7.11%	7.32%
10-year G-sec	6.54%	6.53%	6.52%	6.35%	6.58%	6.85%
Net LAF (Rs Cr)	27548	26735	45790	287764	-9354	48907
Forex reserves (\$ bn)	702.28	697.78	702.57	695.49	642.49	688.27

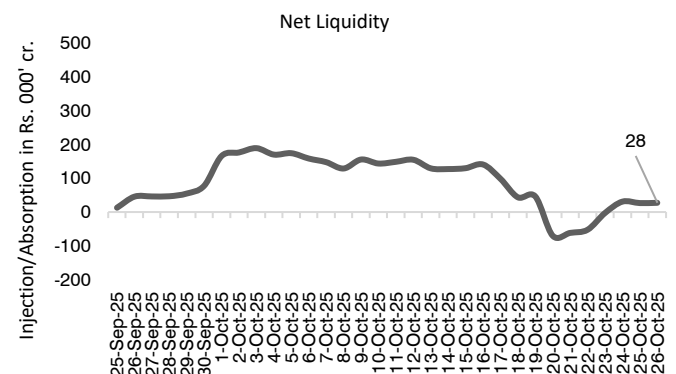
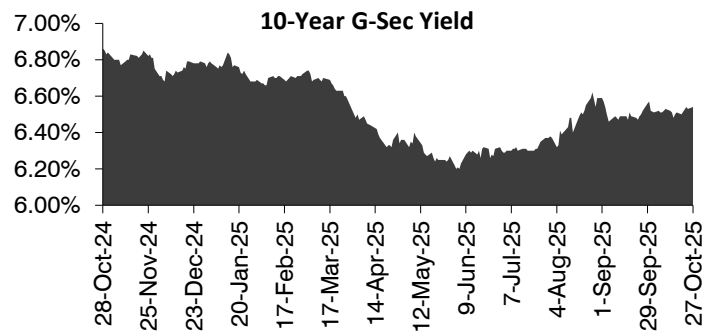
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.56	6.51	7.22	7.26	8.49	9.02
1 Year	5.59	6.67	7.38	7.42	8.65	9.18
3 Year	5.76	6.86	7.57	7.61	8.84	9.37
5 Year	6.17	6.90	7.71	7.74	8.98	9.51
10 Year	6.54	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 24-Oct	MF Inv 15-Oct
Buy	70	14,206
Sell	391	14,905
Net	-321	-699
Net (MTD)	5,440	3,169
Net (YTD)	14,381	-466,227

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*	2.35% (Oct 03, 2025)		-0.52% (Sep 19, 2025)
Bank Deposit Growth*	1.92% (Oct 03, 2025)		0.54% (Sep 19, 2025)

Capital markets

- Curefoods secured approval from Sebi for its initial public offering and plans to raise Rs 800 crore.
- SEBI approved IPO plans for Kanodia Cement, Gaja Alternative Asset Management, and Steamhouse India,
- Shriram Properties Limited (SPL) signed a joint development agreement (JDA) for a premium row housing project in Yelahanka, North Bengaluru, with an estimated gross development value (GDV) of around Rs 600 crore.
- NCC secured orders worth Rs 6,829 cr from Central Coalfields.
- GPT Infraprojects secured Rs 195-crore contract from Terminal Industriel Polyvalent de San Pedro, Ivory Coast.
- Harman announced an investment of Rs 345 crore to expand its automotive electronics manufacturing facility in Chakan, Pune.



Global market indices	27-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47544.59	0.71	2.81	13.20	12.89
Nikkei 225	50512.32	2.46	11.37	41.82	33.23
FTSE	9653.82	0.09	3.97	12.48	17.03
Hang Seng	26433.7	1.05	1.17	14.33	28.38
Taiwan	27993.63	1.68	9.43	35.26	19.90

Global debt	27-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.01	4.02	4.20	4.40	4.23	4.25
UK 10-Year (%)	4.40	4.43	4.75	4.62	4.68	4.24
German 10-Year (%)	2.62	2.62	2.75	2.72	2.73	2.29
Japan 10-Year (%)	1.66	1.66	1.66	1.60	1.49	0.93

Domestic	27-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	121077	-0.36	6.90	35.79	55.20
Silver (Rs / Kg)	145031	-1.36	5.02	43.75	51.39
Aluminium (Rs / Kg)	270	1.18	4.94	7.57	11.00
Copper (Rs / kg)	1010	1.26	7.54	12.43	22.16
Lead (Rs / kg)	183	-0.11	-1.11	-2.12	-4.94
Zinc (Rs /Kg)	305	0.23	6.58	10.99	5.00
Nickel (Rs / kg)	1360	0.42	0.27	-3.91	-0.88

Global	27-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4113.48	-0.39	9.98	32.65	50.43
Silver (oz/\$)	4860.00	-0.74	8.48	42.44	44.60
Brent (\$/bbl)	65.62	-0.49	-6.43	-12.24	-13.71
NYMEX crude (\$/bbl)	61.31	-0.31	-6.71	-14.23	-14.59

Global markets

- Wall Street stocks ended higher on Monday boosted by optimism over a potential US-China trade deal and upcoming tech earnings.
- 10-year US bond yield ended almost flat at 4.01% as investors remained caution over progress in trade talks between US and China.
- FTSE index closed flat on Monday as investors were cautious due to decline in HSBC after a huge loss from a court case.
- Asian markets were trading higher at 8.30 AM.
- US Dallas Fed Manufacturing Index fell to 5.0 in October 2025 compared to a 8.7 decline in September 2025.

Commodity

- Crude oil prices fell by 19 cents to \$61.31 a barrel on the NYMEX as OPEC's output plans offset optimism over a US-China trade deal and renewed sanctions on Russia.
- Domestic gold prices ended lower due to easing US-China trade talks concerns.

Forthcoming results

Date	Company
27-Oct	Indian Oil Corporation
27-Oct	Adani Energy Solutions
27-Oct	INDUS TOWERS
28-Oct	TVS Motor Company
28-Oct	Adani Green Energy Limited
28-Oct	Shree Cements
29-Oct	Larsen & Toubro
29-Oct	Coal India

Upcoming market indicators

Date	Indicator	Previous
Oct 28	India Manufacturing Production, Sep	3.8%
Oct 29	US Fed Interest Rate Decision	4.25%
Oct 30	Eurozone Unemployment Rate, Sep	6.3%
Oct 31	Japan Unemployment Rate, Sep	2.6%
Nov 3	US ISM Manufacturing PMI, Oct	49.1

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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