

Daily Market Monitor

October 30, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	29-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	26054	0.45	5.76	10.78	6.49
BSE Sensex	84997	0.44	5.76	9.79	5.76
BSE 100	27298	0.55	5.71	11.07	5.86
BSE 200	11795	0.63	5.48	11.24	5.07
BSE 500	37599	0.58	5.27	11.97	4.67
BSE SmallCap	54122	0.56	3.69	16.05	1.56
BSE MidCap	47306	0.68	5.36	13.90	2.61
BSE LargeCap	10022	0.58	5.38	10.94	5.53
Sectoral indices					
BSE IT	35351	0.59	6.33	-2.14	-15.36
BSE Oil & Gas	28522	2.55	5.83	13.48	3.22
BSE FMCG	20810	0.89	3.09	7.01	-3.56
BSE Auto	60168	-0.53	1.84	26.13	11.99
BSE Bankex	65771	0.33	7.16	10.46	10.23
BSE Teck	17885	0.62	7.88	3.09	-6.98
BSE Capital Goods	70022	1.01	2.55	11.63	4.09
BSE Consumer Durable	61094	0.81	5.07	12.34	-1.42

Turnover (Rs Cr)	29-Oct	28-Oct
BSE Cash	8521	8211
NSE Cash	112298	116153
NSE F&O	11025357	80980976

Rs. Cr (Equity)	FII Inv 28-Oct	MF Inv 27-Oct	DII Inv 29-Oct
Buy	27,381	7,695	18,681
Sell	17,950	5,715	13,098
Net	9,431	1,980	5,583
Net (MTD)	19,129	20,196	39,972
Net (YTD)	-134,065	419,824	599,139

	29-Oct	1Day	Month ago	Year ago
USD	88.28	88.30	88.76	84.07
GBP	116.87	117.96	119.28	109.13
Euro	102.68	102.96	104.05	90.96
100 Yen	57.99	58.09	59.64	54.80

Indian markets

- Indian equity benchmarks closed higher on Wednesday, driven by optimism over US Federal Reserve rate cut and potential US-China trade truce.
- The top gainers were Adani Ports, NTPC, Power Grid Corporation of India, HCL Technologies and ONGC, up 2.04% - 2.60%.
- The top losers were Dr Reddys Labs, Coal India, Bharat Electronics, M&M and Eternal, down 1.24% - 2.99%.

Indian debt

- The interbank call money rate ended lower at 5.40% on Wednesday compared to 5.55% on Tuesday.
- Government bond prices ended flat on Wednesday ahead of the US Federal Reserve's policy decision.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.54% on Wednesday.

Indian Rupee

- The rupee ended marginally higher against the US dollar on Wednesday as likely central bank intervention backed the currency, while traders turned their focus to the upcoming US Federal Reserve policy decision.

Regulatory

- The Reserve Bank of India (RBI) Deputy Governor Poonam Gupta said, majority of the respondents to the discussion paper on inflation-targeting framework suggested maintaining the current framework, keeping headline consumer price index (CPI) as the target as there was an agreement the 4 per cent target suits India's current income level and growth stage.

Economy and Government

- Chief Economic Advisor (CEA) V Anantha Nageswaran said India's economy is performing better than expected and is likely to post growth north of 6.7% in the current financial year, noting that earlier concerns about a slowdown have eased significantly.
- Prime Minister Narendra Modi said India's shipping ports are now counted among the most efficient in the developing world, adding that the country's maritime sector is progressing with great speed and energy.
- Prime Minister Narendra Modi pitched India as a "steady lighthouse" for the world amid global tensions, trade disruptions and shifting supply chains.
- Prime Minister Narendra Modi said India will prioritise the blue economy and sustainable coastal development over the next 25 years.
- The Department of Financial Services under the Finance Ministry said it has launched the National Cyber Awareness campaign.
- The Centre announced a 10% import duty and an additional 20% Agriculture Infrastructure Development Cess (AIDC) on yellow pea imports, to be effective from November 1.

Domestic Debt Market Indicators

Instrument	29-Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.55%	5.00%	4.95%	7.00%	6.50%
3-Month T-Bill	5.46%	5.48%	5.49%	5.38%	6.34%	6.53%
6-Month T-Bill	5.58%	5.55%	5.54%	5.49%	6.47%	6.59%
1-year T-Bill	5.57%	5.55%	5.58%	5.51%	6.40%	6.59%
3-Month CD	6.02%	5.98%	5.93%	5.77%	7.00%	7.20%
6-Month CD	6.23%	6.25%	6.17%	6.03%	7.25%	7.40%
1-year CD	6.40%	6.42%	6.40%	6.25%	7.15%	7.50%
3-Month CP	6.58%	6.55%	6.57%	6.18%	7.25%	7.52%
6-Month CP	6.79%	6.79%	6.68%	6.36%	7.55%	7.75%
1-year CP	6.94%	6.94%	6.88%	6.60%	7.45%	7.85%
1-year Gilt	5.63%	5.63%	5.61%	5.59%	6.40%	6.64%
3-year Gilt	5.89%	5.91%	5.93%	5.88%	6.44%	6.75%
5-year Gilt	6.16%	6.18%	6.20%	6.11%	6.45%	6.77%
1-year AAA	6.67%	6.67%	6.72%	6.52%	7.29%	7.57%
3-year AAA	6.86%	6.86%	6.96%	6.70%	7.11%	7.37%
5-year AAA	6.90%	6.90%	7.00%	6.74%	7.11%	7.32%
10-year G-sec	6.53%	6.54%	6.56%	6.37%	6.58%	6.85%
Net LAF (Rs Cr)	-8084	-20862	55006	268140	-9354	101203
Forex reserves (\$ bn)	702.28	697.78	702.57	695.49	642.49	688.27

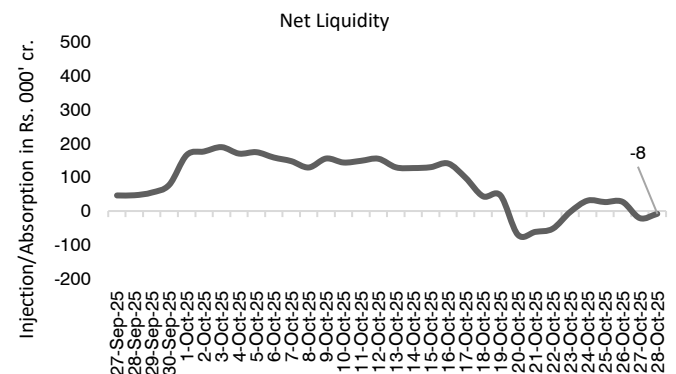
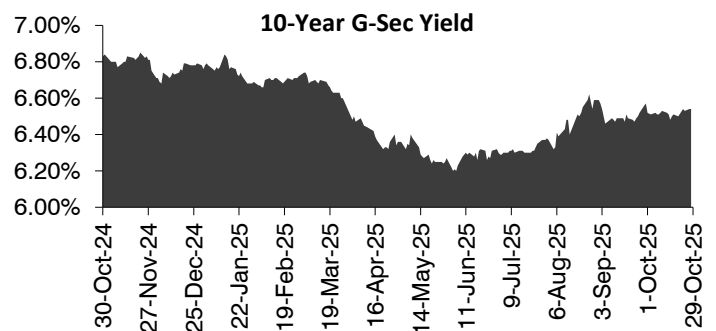
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.58	6.49	7.20	7.24	8.47	9.00
1 Year	5.63	6.67	7.38	7.42	8.65	9.18
3 Year	5.78	6.86	7.57	7.61	8.84	9.37
5 Year	6.16	6.90	7.71	7.74	8.98	9.51
10 Year	6.53	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 28-Oct	MF Inv 27-Oct
Buy	129	6,954
Sell	248	6,602
Net	-119	352
Net (MTD)	5,252	-37
Net (YTD)	14,193	-469,433

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% (Sep-25)	1.5% (Jun-25)	3.2% (Sep-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

- Goldi Solar raised over Rs 1,400 crore in funding from a clutch of investors, including Havells India and Zerodha co-founder Nikhil Kamat.
- Studds Accessories raised nearly Rs 137 crore from anchor investors, ahead of its initial share sale opening for public subscription.
- SBI Optimal Equity Fund (AIF) and SBI Emergent Fund (AIF) invested Rs 100 crore in eyewear retailer Lenskart Solutions Limited through a pre-IPO transaction at a transfer price of Rs 402 per equity share.
- StampMyVisa raised Rs 4 crore in a funding round led by Unicorn India Ventures.
- Point AI raised \$5.3 million in round led by Yali Capital to expand its market presence, refine its products, invest in R&D, and invest in acquiring talent.



Global market indices	29-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47632	-0.16	2.84	13.40	12.78
Nikkei 225	51307.65	2.17	13.91	44.05	31.88
FTSE	9756.14	0.61	4.91	13.67	18.69
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	28294.74	1.24	10.61	36.72	23.41

Global debt	29-Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.08	3.99	4.15	4.34	4.23	4.28
UK 10-Year (%)	4.40	4.40	4.70	4.62	4.68	4.32
German 10-Year (%)	2.62	2.62	2.71	2.69	2.73	2.33
Japan 10-Year (%)	1.65	1.63	1.64	1.57	1.49	0.97

Domestic	29-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	120628	2.19	4.48	35.29	53.19
Silver (Rs / Kg)	146633	3.34	1.56	45.34	49.82
Aluminium (Rs / Kg)	274	1.60	5.72	9.02	12.38
Copper (Rs / kg)	1019	1.73	6.87	13.41	22.75
Lead (Rs / kg)	184	-0.73	-0.49	-1.50	-0.03
Zinc (Rs /Kg)	310	1.12	8.13	13.16	4.46
Nickel (Rs / kg)	1360	1.61	1.04	-3.89	-0.23

Global	29-Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3967.41	-0.95	5.52	27.94	44.64
Silver (oz/\$)	4720.00	0.83	2.50	38.34	39.69
Brent (\$/bbl)	64.92	0.81	-4.49	-13.17	-8.72
NYMEX crude (\$/bbl)	60.48	0.50	-4.68	-15.39	-10.01

Upcoming market indicators

Date	Indicator	Previous
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
Nov 4	India HSBC Manufacturing PMI Final, Oct	57.7
Nov 5	Eurozone PPI, Sep	-0.6%

Global markets

- Wall Street stocks closed mixed on Wednesday with Nasdaq advancing on gains in Nvidia while Dow Jones declined after Fed signaled no assurance of another rate cut.
- 10-year US bond yield ended higher at 4.08% after the Fed's expected 25 bps rate cut.
- FTSE index closed higher on Wednesday boosted by upbeat earnings forecast.
- Asian markets were trading mixed at 8.30 AM.
- The Federal Reserve lowered the federal funds rate by 25 bps to a target range of 3.75%–4.00% at its October 2025 meeting.
- US Pending Home Sales decreased -0.9% in September 2025, compared to a 3.8% rise in August.
- Japan consumer confidence index rose to 35.8 in October 2025 compared to 35.3 in September 2025.

Commodity

- Crude oil prices rose by 30 cents to \$60.48 a barrel on the NYMEX due to a fall in US crude and fuel inventories and optimism over ahead of US-China talks.
- Domestic gold prices rose due to safe haven demand ahead of the Federal Reserve rate cut decision.

Forthcoming results

Date	Company
30-Oct	ITC Ltd.
30-Oct	Pidilite Industries
30-Oct	Cipla
30-Oct	United Spirits
31-Oct	Maruti Suzuki India
31-Oct	Bharat Electronics
31-Oct	Shriram Finance
31-Oct	Godrej Consumer Products

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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