

# Daily Market Monitor

November 5, 2025

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	4-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25598	-0.64	2.83	8.84	6.68
BSE Sensex	83459	-0.62	2.77	7.81	5.94
BSE 100	26894	-0.62	3.05	9.42	6.18
BSE 200	11646	-0.57	2.97	9.83	5.51
BSE 500	37147	-0.57	2.72	10.63	4.72
BSE SmallCap	53882	-0.69	0.95	15.53	-1.50
BSE MidCap	47214	-0.26	3.36	13.68	3.36
BSE LargeCap	9873	-0.63	2.73	9.29	5.85
Sectoral indices					
BSE IT	34601	-1.06	3.14	-4.21	-14.50
BSE Oil & Gas	28796	-0.41	6.28	14.57	6.63
BSE FMCG	20502	-0.71	1.00	5.42	-4.66
BSE Auto	59491	-0.77	-0.37	24.71	10.92
BSE Bankex	65041	-0.44	3.67	9.24	11.56
BSE Teck	17635	-0.15	5.97	1.65	-5.10
BSE Capital Goods	70386	-0.20	1.34	12.21	2.72
BSE Consumer Durable	60495	0.11	3.15	11.24	0.15

Turnover (Rs Cr)	4-Nov	3-Nov
BSE Cash	6881	7517
NSE Cash	103984	99211
NSE F&O	55166600	25962333

Rs. Cr (Equity)	FII Inv 3-Nov	MF Inv 30-Nov	DII Inv 4-Nov
Buy	10,046	10,356	15,151
Sell	11,979	9,142	14,109
Net	-1,932	1,214	1,042
Net (MTD)	-1,932	17,778	4,316
Net (YTD)	-146,917	417,407	612,922

	4-Nov	1Day	Month ago	Year ago
USD	88.64	88.79	88.78	84.11
GBP	116.32	116.70	119.32	109.11
Euro	102.14	102.43	104.08	91.65
100 Yen	57.72	57.59	60.16	55.38

## Indian markets

- Indian equity benchmarks closed lower on Tuesday, driven by losses in IT, auto and metal stocks and after top Federal Reserve officials pushed back against expectations of another interest rate cut in December.
- The top losers were Power Grid Corporation of India, Coal India, Eternal, TMPV and ONGC, down 2.02-3.11%.
- The top gainers were Titan Company, Bharti Airtel, Bajaj Finance, Mahindra & Mahindra and HDFC Life, up 0.88-2.39%.

## Indian debt

- The interbank call money rate ended lower at 4.95% on Tuesday compared to 5.00% on Monday.
- Government bond prices rose marginally on Tuesday on short covering and suspected RBI buying. However, gains were capped by supply concerns ahead of Friday's auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.52% on Tuesday compared to 6.53% on Monday.

## Indian Rupee

- The rupee ended higher against the US dollar on Tuesday due to RBI intervention.

## Regulatory

- The Reserve Bank of India has announced the premature redemption price for Sovereign Gold Bond (SGB) 2018-19 Series-I, set at Rs 12,039 per unit.
- The Securities and Exchange Board of India (Sebi) plans to update stockbroker regulations by December 2025 to enhance risk management and data protection.
- Sebi chairman Tuhin Kanta Pandey expressed his displeasure over "repeated" instances of breakdowns at exchanges.
- Securities and Exchange Board of India (Sebi) chairman Tuhin Kanta Pandey said the rise of algorithmic and high-frequency trading brings efficiency but also demands robust risk controls, real-time monitoring and compliance safeguards.
- India Post Payments Bank (IPPB) partnered with EPFO to offer doorstep Digital Life Certificate (DLC) services for EPS'95 pensioners.
- The National Stock Exchange (NSE) will roll out a pre-open session for equity derivatives from December 8. The pre-open session will be conducted using a call auction mechanism for 15 minutes, from 9:00 am to 9:15 am.

## Economy and Government

- The government launched the third round of Production Linked Incentive (PLI) Scheme for speciality steel to attract investment in the sector, as part of its objective to boost domestic output and reduce imports.

## Domestic Debt Market Indicators

Instrument	4-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.00%	5.45%	4.95%	7.00%	5.75%
3-Month T-Bill	5.46%	5.46%	5.43%	5.38%	6.34%	6.48%
6-Month T-Bill	5.55%	5.56%	5.55%	5.48%	6.47%	6.58%
1-year T-Bill	5.56%	5.56%	5.55%	5.47%	6.40%	6.57%
3-Month CD	6.00%	6.00%	5.85%	5.73%	7.00%	7.17%
6-Month CD	6.24%	6.24%	6.18%	6.00%	7.25%	7.38%
1-year CD	6.44%	6.44%	6.35%	6.22%	7.15%	7.50%
3-Month CP	6.52%	6.52%	6.53%	6.18%	7.25%	7.55%
6-Month CP	6.77%	6.77%	6.70%	6.36%	7.55%	7.80%
1-year CP	6.94%	6.94%	6.90%	6.65%	7.45%	7.90%
1-year Gilt	5.62%	5.66%	5.59%	5.57%	6.40%	6.73%
3-year Gilt	5.91%	5.91%	5.93%	5.84%	6.44%	6.74%
5-year Gilt	6.16%	6.17%	6.11%	6.07%	6.45%	6.77%
1-year AAA	6.66%	6.66%	6.67%	6.48%	7.29%	7.59%
3-year AAA	6.85%	6.85%	6.91%	6.66%	7.11%	7.37%
5-year AAA	6.89%	6.89%	6.95%	6.70%	7.11%	7.32%
10-year G-sec	6.53%	6.53%	6.51%	6.32%	6.58%	6.80%
Net LAF (Rs Cr)	175304	110605	189581	399965	-9354	275989
Forex reserves (\$ bn)	695.36	702.28	700.24	698.19	642.49	684.81

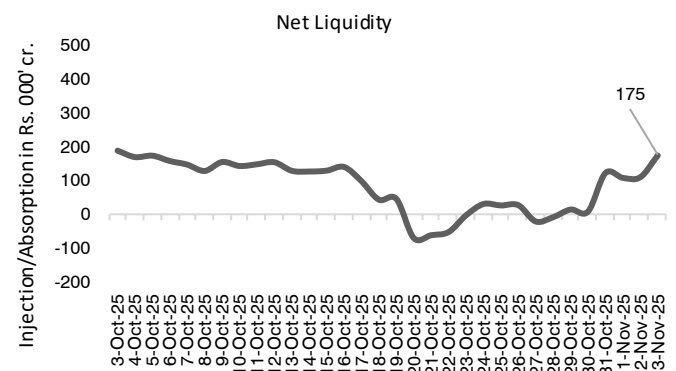
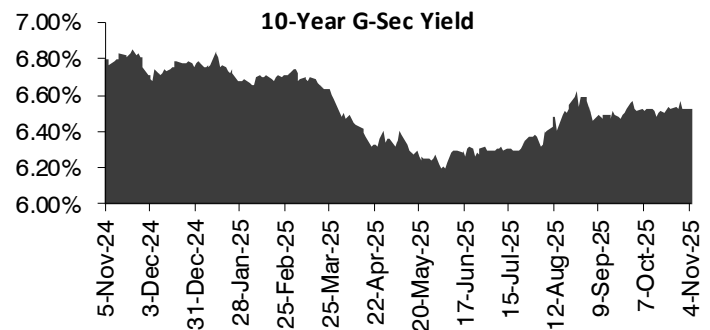
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.48	7.19	7.23	8.46	8.99
1 Year	5.62	6.66	7.37	7.41	8.64	9.17
3 Year	5.91	6.85	7.56	7.60	8.83	9.36
5 Year	6.16	6.89	7.70	7.73	8.97	9.50
10 Year	6.53	7.13	7.94	7.97	9.21	9.74

Rs. Cr (Debt)	FII Inv 3-Nov	MF Inv 30-Nov
Buy	111	10,409
Sell	572	11,857
Net	-461	-1,448
Net (MTD)	-461	-6,036
Net (YTD)	11,966	-475,432

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	59.2 (Oct-25)	59.1 (Jul-25)	59.2 (Oct-24)
India Service PMI	60.9 (Sep-25)	62.5 (Aug-25)	57.7 (Sep-24)
Bank Credit Growth*	-0.89% (Oct 17, 2025)		2.35% (Oct 03, 2025)
Bank Deposit Growth*	-0.28% (Oct 17, 2025)		1.92% (Oct 03, 2025)

## Capital markets

- Century Real Estate announced its latest mixed-use development project in East Bengaluru with a gross development value (GDV) of Rs 3,000 crore.
- Tata Steel signed an asset transfer agreement with Indian Metals & Ferro Alloys Ltd (IMFA) for the sale of its ferro alloy plant at Jajpur, Odisha, for a base consideration of Rs 610 crore.
- RITES secured an order worth Rs 372.68 crore from NIMHANS Bengaluru.
- TIRUN Travel Marketing partnered with Air India to offer integrated flight and cruise packages for Indian travelers.
- Bharti Airtel has received board approval to raise its stake in Indus Towers by up to 5%, with the purchase to be carried out in one or more tranches over time.
- Adani Group partnered with US-based Autodesk for three years to use its Construction Cloud and BIM services across global infrastructure projects.
- Affirma Capital plans to invest up to \$56 million in RMSI Limited, a leading engineering and data analytics company serving global clients in navigation, mapping, telecom, utilities, and sustainability.
- IIT Madras launches platform to bridge information gap in startup ecosystem.



Global market indices	4-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47085.2	-0.53	0.70	12.10	12.66
Nikkei 225	51497.2	-1.74	12.51	44.58	35.33
FTSE	9714.96	0.14	2.36	13.19	18.70
Hang Seng	25952.4	-0.79	-4.38	12.25	26.18
Taiwan	28116.56	-0.77	5.07	35.86	22.43

Global debt	4-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.10	4.13	4.13	4.22	4.23	4.31
UK 10-Year (%)	4.42	4.43	4.70	4.51	4.68	4.46
German 10-Year (%)	2.65	2.66	2.70	2.63	2.73	2.39
Japan 10-Year (%)	1.67	1.65	1.66	1.51	1.49	0.94

Domestic	4-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	120419	-0.30	2.96	35.05	53.36
Silver (Rs / Kg)	146150	-2.11	0.37	44.86	54.69
Aluminium (Rs / Kg)	273	-0.67	4.76	8.76	13.75
Copper (Rs / kg)	1000	-1.34	2.30	11.32	19.98
Lead (Rs / kg)	184	0.14	0.66	-1.66	-4.53
Zinc (Rs /Kg)	311	0.27	4.63	13.21	7.75
Nickel (Rs / kg)	1346	-0.04	-0.92	-4.90	-1.31

Global	4-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4001.65	-0.03	4.08	29.04	46.76
Silver (oz/\$)	4830.00	-0.78	3.71	41.56	48.30
Brent (\$/bbl)	64.44	-0.69	-0.14	-13.82	-14.17
NYMEX crude (\$/bbl)	60.56	-0.80	-0.53	-15.28	-15.27

## Global markets

- Wall Street stocks closed lower on Tuesday due to warnings from major banks about overvalued markets.
- 10-year US bond yield ended lower at 4.10% as investors weighed the state of the economy and looked ahead to a speech by Federal Reserve Vice Chair for Supervision Michelle Bowman.
- FTSE index closed higher on Tuesday supported by healthcare stocks and a weaker pound.
- Asian markets were trading mixed at 8.30 AM.
- US Logistics Manager's Index (LMI) remained at 57.4 in October 2025 unchanged from September.
- China RatingDog General Services PMI contracted to 52.6 in October 2025 compared to 52.9 in September 2025 while the RatingDog General Composite PMI fell to 51.8 from 52.5.

## Commodity

- Crude oil prices fell by 49 cents to \$60.56 a barrel on the NYMEX pressured by a stronger dollar and OPEC+'s pause signaling supply concerns.
- Domestic gold prices declined due to profit booking.

## Forthcoming results

Date	Company
5-Nov	Sun Pharmaceutical Industries Ltd.
5-Nov	Grasim Industries Ltd
5-Nov	Britannia Industries Ltd.

## Upcoming market indicators

Date	Indicator	Previous
Nov 5	Eurozone PPI, Sep	-0.6%
Nov 6	Japan S&P Global Composite PMI Final, Oct	51.3
Nov 7	UK Halifax House Price Index, Oct	1.3%
Nov 9	China Inflation Rate, Oct	-0.3%
Nov 10	Japan Foreign Exchange Reserves, Oct	\$1341.3B

**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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