

# Daily Market Monitor

November 6, 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 outflow of foreign funds and subdued domestic equity markets.

## Regulatory

- The Enforcement Directorate (ED) and the Insolvency and Bankruptcy Board of India (IBBI) issued a new mechanism allowing assets of bankrupt companies and their promoters, to be restored to affected parties like banks or homebuyers.

## Economy and Government

- Odisha Chief Minister Mohan Charan Majhi announced plans to set up a new port at Bahuda in Ganjam district and a shipbuilding and repair centre at the Mahanadi river mouth near Paradip with a total investment of over Rs 46,000 crore.
- Commerce and Industry Minister Piyush Goyal said India "consistently protects the interests of its vulnerable sectors in free trade agreements (FTAs), adding that significant progress has been made in negotiations for a proposed deal with New Zealand.
- Maharashtra signed an agreement with Starlink to bring satellite-based internet connectivity to remote regions and critical infrastructure, making it the first Indian state to formally collaborate with the US-based satellite firm.

## 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

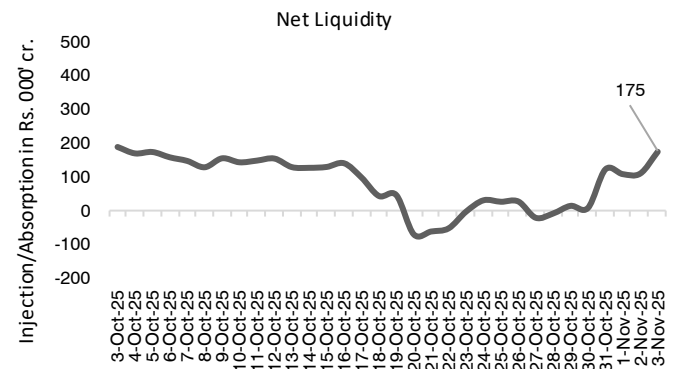
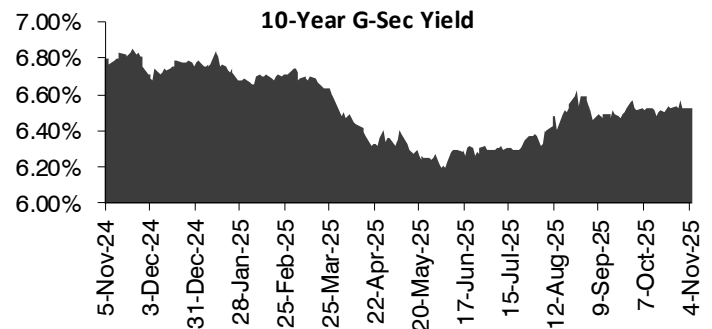
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.48	7.19	7.23	8.46	8.99
1 Year	5.62	6.66	7.37	7.41	8.64	9.17
3 Year	5.91	6.85	7.56	7.60	8.83	9.36
5 Year	6.16	6.89	7.70	7.73	8.97	9.50
10 Year	6.53	7.13	7.94	7.97	9.21	9.74

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

- MoEngage raised \$100 million from existing investor Goldman Sachs Alternatives and new investor A91 Partners.
- Lighthouse Canton raised \$40 million in a strategic funding round led by Peak XV Partners, with participation from Nextinfinit and Qatar Insurance Company.
- Babyorgano raised \$2.2 million (around Rs 20 crore) in funding from RPSG Capital Ventures and Sauce VC.
- SAEL Industries plans to invest Rs 22,000 crore in Andhra Pradesh across sectors, including green energy, biomass, data centres, and port development.
- Emirates NBD Bank plans to acquire a 26% stake in RBL Bank via an open offer at Rs 280 per share, totaling Rs 11,636 crore.
- M3M India plans to invest Rs 7,200 crore to develop a 150-acre integrated township in Gurugram as part of its expansion plan.
- A91 Partners invested Rs 300 crore in Spacewood Furnishers, a modular furniture manufacturer based in Nagpur.



Global market indices	5-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47311	0.48	1.18	12.64	12.05
Nikkei 225	50212.27	-2.50	9.71	40.98	30.51
FTSE	9777.08	0.64	3.01	13.91	19.64
Hang Seng	25935.41	-0.07	-4.44	12.18	23.46
Taiwan	27717.06	-1.42	3.57	33.93	19.95

Global debt	5-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.17	4.10	4.13	4.22	4.23	4.26
UK 10-Year (%)	4.46	4.42	4.70	4.52	4.68	4.53
German 10-Year (%)	2.67	2.65	2.70	2.62	2.73	2.43
Japan 10-Year (%)	1.66	1.67	1.66	1.47	1.49	0.93

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	5-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3950.68	-1.27	2.76	27.40	44.31
Silver (oz/\$)	4755.00	-1.55	2.10	39.36	46.31
Brent (\$/bbl)	63.52	-1.43	-1.57	-15.05	-15.90
NYMEX crude (\$/bbl)*	59.60	-1.59	-2.10	-16.62	-17.21

## Upcoming market indicators

Date	Indicator	Previous
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
Nov 11	UK Unemployment Rate, Sep	4.8%

## Global markets

- Wall Street stocks closed higher on Wednesday on easing concerns over tech valuations and strong earnings.
- 10-year US bond yield ended higher at 4.17% as the limited scope of private economic data release reflected some resilience in the economy.
- FTSE index closed higher on Wednesday as investors awaited the Bank of England's rate decision and upcoming corporate earnings.
- Asian markets were trading mixed at 8.30 AM.
- The US economy added 42,000 jobs in October 2025, compared to an upwardly revised 29,000 jobs cut in September 2025.
- US ISM Services PMI rose to 52.4 in October 2025 compared to 50 in September 2025.
- US S&P Global US Services PMI inched higher to 54.8 in October 2024 compared to 54.2 in September 2025 while the S&P Global Composite PMI rose to 54.6 from 53.9.
- Eurozone Producer Prices decreased 0.2% in September 2025 compared to 0.6% fall in August 2025.
- Eurozone Services PMI increased to 53 in October 2025 compared to 51.3 in September 2025 while the HCOB Composite PMI climbed to 52.5 from 51.2.
- UK S&P Global Services PMI edged up to 52.3 in October 2025 compared to 50.8 in September 2025 while the S&P Global Composite PMI rose to 52.2 from 50.1.
- Japan S&P Global Services PMI eased to 53.1 in October 2025, compared to 53.3 in September 2025 while the S&P Global Composite PMI rose to 51.5 from 51.3.

## Commodity

- Crude oil prices fell by 96 cents to \$59.60 a barrel on the NYMEX amid concerns of a global supply glut.
- Domestic gold prices declined due to strong dollar and profit booking.

## Forthcoming results

6-Nov	LIFE INSURANCE CORPORATION OF INDIA
6-Nov	Cholamandalam Investment and Finance Company Ltd
6-Nov	Apollo Hospitals Enterprises Ltd.
6-Nov	ABB India Limited
6-Nov	Mankind Pharma Limited
6-Nov	Zydus Lifesciences Limited
6-Nov	Bajaj Housing Finance Limited
6-Nov	Lupin Ltd

**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	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25
Debt Indicators	Currency in circulation (Rs billion)	38184	38071	38097	38147	38372	38344	37762	36997	36444	35893
	Repo rate	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%
	10-year G-sec yield	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%
	Call rate	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%
	Forex reserves (\$ billion; mthly. avg.)	699	701	693	698	699	689	682	656	638	629
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18	1773.1	2554.5
	IIP, %y/y	NA	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%
	Exports, \$ billion	NA	36.38	35.1	37.24	35.14	38.73	38.49	41.97	36.91	36.43
	Imports, \$ billion	NA	68.53	61.59	64.59	53.92	60.61	64.91	63.51	50.96	59.42
	Manufacturing PMI	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7
	Services PMI	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5	59	56.5
	GST collections (Rs crore)	195936	189017	186315	195735	184597	201050	236716	196141	183646	195506
	India crude oil import (mbpd)	NA	19.934	19.6	18.56	20.32	21.3	21.0	22.7	19.1	21.2
Sector update	Auto – Passenger vehicles	NA	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%
	Auto – Two-wheelers	NA	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%
	Auto – Commercial vehicles	NA	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%
	Auto – Tractors	NA	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%	13.60%	11.39%
	Infra – Coal	NA	-1.20%	11.40%	-	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%
	Infra – Electricity	NA	2.1%	3.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%
	Infra – Steel	NA	14.10%	14.20%	16.60%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%
	Infra – Cement	NA	5.30%	6.10%	11.60%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%

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