

Domestic Market Performance

Indian market indices	29 Sep	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22716	-0.28	-6.04	1.72	-7.79
BSE Sensex	72529	-0.33	-6.13	0.81	-9.75
BSE 100	24296	-0.49	-6.19	3.80	-5.92
BSE 200	10680	-0.48	-6.17	5.16	-4.50
BSE 500	34622	-0.48	-5.90	7.58	-3.07
BSE SmallCap	57472	0.12	-2.00	32.98	10.11
BSE MidCap	45938	-0.94	-7.03	13.32	2.31
BSE LargeCap	8985	-0.37	-5.97	4.12	-5.53
Sectoral indices					
BSE IT	26668	-1.28	-11.04	-4.50	-19.78
BSE Oil & Gas	24891	-0.67	-4.18	-2.61	-7.64
BSE FMCG	16965	-0.85	-4.48	1.14	-15.96
BSE Auto	58052	-1.08	-8.92	10.34	-1.74
BSE Bankex	61306	-0.39	-5.63	8.35	-0.11
BSE Teck	14159	-0.55	-9.28	-3.86	-14.59
BSE Capital Goods	74345	-0.13	-6.50	15.72	8.88
BSE Consumer Durable	59454	-1.97	-8.63	12.99	2.24

Turnover (Rs Cr)	29 Sep	28 Sep
BSE Cash	10576	9383
NSE Cash	161565	100535
NSE F&O	58014876	25115471

Rs. Cr (Equity)	FII Inv 28 Sep	MF Inv 21 Sep	DII Inv 29 Sep
Buy	10,186	10,087	46,261
Sell	15,154	8,900	39,308
Net	-4,968	1,187	6,953
Net (MTD)	-20,229	27,619	64,759
Net (YTD)	-247,841	398,622	620,711

	29 Sep	1Day	Month ago	Year ago
USD	96.03	95.97	95.56	88.76
GBP	127.17	127.03	129.89	119.28
Euro	109.13	109.20	111.30	104.05
100 Yen	61.06	60.88	59.92	59.64

Indian markets

- Indian equities closed lower on Tuesday, dragged down by losses in information technology and consumer durables stocks, while persistent inflation concerns weighed on investor sentiment.
- The top losers were Titan Company, Wipro, HCL Technologies, Apollo Hospitals Enterprise and Tech Mahindra, down 2.06-3.00%.
- The top gainers were Adani Enterprises, Adani Ports and Special Economic Zone, Dr. Reddy's Laboratories, Sun Pharmaceutical Industries and Infosys, up 1.22-5.01%.

Indian debt

- The interbank call-money rate ended higher at 5.15% on Tuesday compared to 4.99% on Monday.
- Government bond prices ended higher on Tuesday as softer crude oil prices supported sentiment, though expectations of an RBI rate hike and ongoing supply concerns limited gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.16% on Tuesday compared to 7.18% on Monday.

Indian Rupee

- The spot rupee ended flat against the United States dollar on Tuesday as easing crude oil prices and likely dollar sales by the Reserve Bank of India helped limit losses.

Regulatory

- RBI released the Report of the Advisory Committee on Ways and Means Advances (WMA) to State Governments, which reviewed state-wise WMA limits and related funding facilities for states..

Economy and Government

- Moody said that India's demographic profile is shifting, with the share of older citizens expected to increase as fertility rates remain below replacement levels.
- The Department of Telecommunications-backed India Mobile Congress 2026 launched the Viksit Tech 47 platform to identify and scale Indian technology companies globally across sectors such as AI, IoT, and electronics manufacturing.
- National High-Speed Rail Corporation Limited (NHSRCL) completed Maharashtra's first steel bridge for the Mumbai-Ahmedabad Bullet Train Project.
- The West Bengal Government assured Indian Oil Corporation (IOC) of land support for its 175-acre Haldia petrochemical expansion project.

Domestic Debt Market Indicators

Instrument	29 Sep	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.15%	4.99%	5.25%	5.35%	7.00%	5.00%
3-Month T-Bill	5.47%	5.44%	5.29%	5.28%	5.40%	5.49%
6-Month T-Bill	5.84%	5.85%	5.63%	5.41%	5.51%	5.54%
1-year T-Bill	6.06%	6.07%	5.79%	5.60%	5.70%	5.58%
3-Month CD	6.34%	6.25%	6.40%	6.60%	7.35%	5.93%
6-Month CD	6.92%	6.85%	6.76%	6.88%	7.30%	6.17%
1-year CD	7.45%	7.45%	7.27%	7.05%	7.25%	6.40%
3-Month CP	7.07%	7.17%	7.05%	7.02%	7.75%	6.57%
6-Month CP	7.37%	7.35%	7.27%	7.25%	7.65%	6.68%
1-year CP	7.95%	7.95%	7.75%	7.45%	7.60%	6.88%
1-year Gilt	6.12%	6.07%	5.79%	5.69%	5.82%	5.61%
3-year Gilt	6.70%	6.67%	6.29%	6.20%	6.43%	5.93%
5-year Gilt	7.02%	7.06%	6.54%	6.43%	6.90%	6.20%
1-year AAA	7.76%	7.78%	7.60%	7.36%	7.57%	6.72%
3-year AAA	7.96%	7.96%	7.73%	7.28%	7.59%	6.96%
5-year AAA	7.99%	7.99%	7.74%	7.34%	7.67%	7.00%
10-year G-sec	7.16%	7.19%	6.91%	6.77%	7.02%	6.56%
Net LAF (Rs Cr)	479892	439485	487762	-13077	245161	55006
Forex reserves (\$ bn)	765.90	780.78	729.33	672.59	642.49	702.57

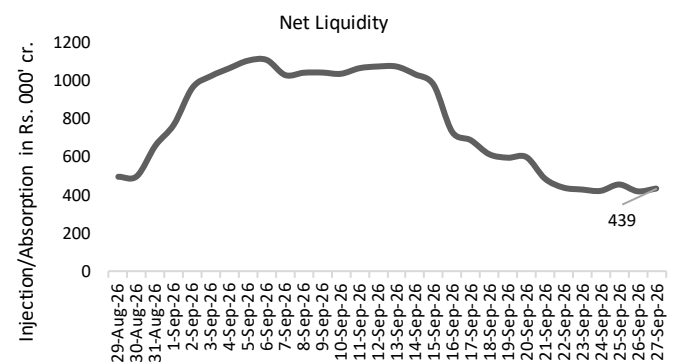
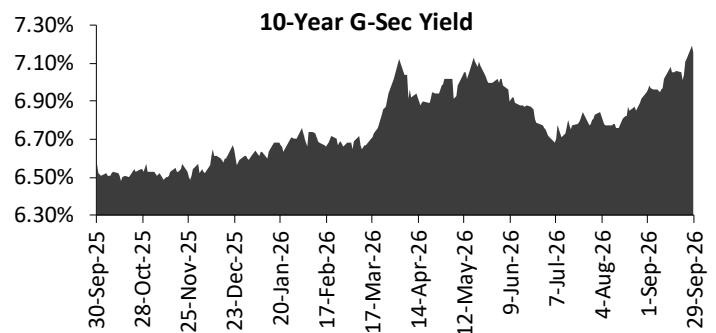
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.84	7.38	8.10	8.18	9.41	9.89
1 Year	6.12	7.76	8.48	8.56	9.79	10.27
3 Year	6.70	7.96	8.68	8.76	9.99	10.47
5 Year	7.02	7.99	8.81	8.89	10.12	10.60
10 Year	7.16	8.01	8.83	8.91	10.14	10.62

Rs. Cr (Debt)	FII Inv 28 Sep	MF Inv 21 Sep
Buy	606	23,724
Sell	3,380	25,486
Net	-2,773	-1,762
Net (MTD)	-4,889	-5,251
Net (YTD)	50,374	-590,039

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	4.82% (Aug'26)	3.93% (May'26)	2.07% (Aug'25)
WPI	9.92% (Aug'26)	9.88% (May'26)	0.00% (Aug'25)
IIP	6.70% (Jul-26)	8.80% (Jun-26)	5.40% (Jul-25)
GDP	7.80% (Apr-Jun'FY27)	8.60% (Jan-Mar'FY26)	6.90% (Apr-Jun'FY26)
India Manufacturing PMI	52.8 (Aug-26)	55.0 (May-26)	59.3 (Aug-25)
India Service PMI	54.3 (Aug-26)	59.8 (May-26)	62.9 (Aug-25)
Bank Credit Growth*	3.49% (Aug 31, 2026)		-0.04% (Aug 15, 2026)
Bank Deposit Growth*	1.73% (Aug 31, 2026)		-0.32% (Aug 15, 2026)

Capital markets

- NCC Ltd secured a Rs 1,076.7 crore drinking water project from the Andhra Pradesh Rural Water Supply and Sanitation Department for the Anakapalli region.
- Anupam Rasayan India Ltd completed the acquisition of a 48.2% controlling stake in Bliss GVS Pharma Ltd at Rs 299 per share, creating a pharmaceutical platform with over Rs 4,000 crore in pro-forma revenue.
- Power Mech Projects secured an order worth Rs 279 crore from Telangana Power Generation Corporation.
- Biosyn secured \$58 million in private credit financing from Orion Capital Asia to support its acquisition of MicroBiopharm Japan Co.
- AMD plans to acquire AI startup World Labs, founded by Fei-Fei Li, in an \$8.2 billion all-stock deal, strengthening its presence in physical AI.
- Medanta acquired land in Ghaziabad for Rs 166 crore to develop a 350-bed hospital.
- Sun Pharma is planning a \$1 billion local debt issuance to refinance existing borrowings and optimize its capital structure.



Global market indices	29 Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51349.92	-0.26	-4.13	10.81	10.87
Nikkei 225	65481.27	-0.60	-1.39	28.23	45.37
FTSE	10636.71	-0.45	-1.73	4.52	14.38
Hang Seng	24523.57	-0.48	-4.15	-1.07	-7.89
Taiwan	47631.96	-0.82	2.81	50.15	86.21

Global debt	29 Sep	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.26	5.24	4.73	4.38	4.30	4.15
UK 10-Year (%)	5.41	5.40	5.08	4.73	4.88	4.70
German 10-Year (%)	3.61	3.64	3.27	2.86	3.01	2.71
Japan 10-Year (%)	3.08	3.10	2.93	2.64	2.35	1.64

Domestic	29 Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147667	-0.21	-7.46	0.64	27.90
Silver (Rs / Kg)	221600	-0.65	-9.14	-3.71	53.48
Aluminium (Rs / Kg)	350	0.49	0.75	-1.42	35.33
Copper (Rs / kg)	1435	0.01	2.05	22.54	50.51
Lead (Rs / kg)	199	2.29	-1.90	0.86	7.66
Zinc (Rs /Kg)	429	0.56	-0.69	32.85	49.37
Nickel (Rs / kg)	1589	-0.90	-2.75	-2.90	18.05

Global	29 Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4135.76	-3.32	-10.30	-8.66	10.00
Silver (oz/\$)	6134.00	-4.40	-11.74	-12.96	33.20
Brent (\$/bbl)	102.59	-2.56	14.87	-13.32	50.93
NYMEX crude (\$/bbl)	89.38	-3.48	7.17	-11.84	40.87

Global markets

- Wall Street stocks closed lower on Tuesday as higher Treasury yields offset gains in technology stocks..
- 10-year US bond yield ended higher at 5.26% due to concerns around inflation and central bank monetary policy.
- FTSE index closed lower on Tuesday weighed down by declines in heavyweight energy stocks as retreating oil prices pressured the sector, while weak revenue guidance from major FMCG company further dampened investor sentiments.
- Asian markets were trading mostly higher at 8.30 AM.
- US House Price Index increased to 2.6% in July 2026 compared to 2.3% in June 2026.
- Eurozone Consumer Inflation Expectations increased to 35.20 in September 2026 compared to 33 in August 2026.
- US Dallas Fed Services Index fell to 1.8 in September 2026, compared to 4.2 rise in August 2026.
- Eurozone Economic Sentiment Indicator eased to 97.9 in September 2026 compared to 98.4 in August 2026, while the industrial sentiment declined to 3.8 from a 5 fall in August and the services sentiment rose to 6.1 from 5.6.
- Japan Industrial production increased 3.4% in August 2026, compared to a 3.9% rise in July 2026.
- Japan Retail sales increased 2.7% in August 2026, compared to a downwardly revised 3.7% growth (4% previously) in July 2026.
- Japan coincident economic index, rose to 120.6 in July 2026 compared to 118.9 in June 2026 while the leading economic index, edged up to 117.7 from 116.2.

Commodity

- Crude oil prices fell by \$3.22 to \$89.38 per barrel on NYMEX amid signs of recovering Middle East oil exports, easing concerns over supply disruptions and reducing the geopolitical risk premium.
- Domestic gold prices declined due to strong dollar index.

Forthcoming results

NA	NA

Upcoming market indicators

Date	Indicator	Previous
Sep 30	Japan Industrial Production YoY Prel, Aug	3.9%
Oct 1	US ISM Manufacturing PMI, Sep	54.6
Oct 2	Eurozone Inflation Rate YoY Flash, Sep	3.2%
Oct 5	Eurozone PPI, Aug	5.8%
Oct 6	Eurozone Retail Sales, Aug	0.6%

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, IBCJA, 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	Aug-26	July-26	June-26	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25
Debt Indicators	Currency in circulation (Rs billion)	42907	42977	43062	42952	42413	41498	40445	39800	39079	38551	38184
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%
	10-year G-sec yield	6.95%	6.83%	6.76%	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%
	Call rate	4.95%	5.35%	5.45%	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%
	Forex reserves (\$ billion; mthly. avg.)	724	677	673	688	700	703	724	696	692	688	699

	GDP	NA	NA	7.80%			8.60%			7.70%		
	Fiscal deficit (Rs billion)	NA	4551.144	3078.33	1623.54	3623.03	2665.2	2712.42	1255.65	-1208.29	1515.27	2520.21
	IIP, %y/y	NA	6.70%	8.80%	5.00%	4.90%	3.00%	4.40%	4.80%	8.00%	7.20%	0.50%
	Exports, \$ billion	NA	44.24	40.41	45.2	43.56	38.92	36.61	36.56	38.51	38.13	34.38
	Imports, \$ billion	NA	76.22	70.84	73.41	71.94	59.59	63.71	71.24	63.55	62.66	76.06
	Manufacturing PMI	52.80	53.50	54.20	55.00	54.70	53.90	56.9	55.4	55	56.6	59.2
	Services PMI	54.10	53.30	57.40	58.90	58.80	57.5	58.1	58.5	58	59.8	58.8
	GST collections (Rs crore)	199853	211205	194,812	194,184	242,702	200064	183609	193384	174550	170276	195936
	India crude oil import (mbpd)	NA	21.405	19.592	22.421	18.468	19.39	20.13	21.09	21.59	21.24	21.01

Sector update	Auto – Passenger vehicles	NA	31.37%	23.00%	27.09%	26.31%	17.10%	11.10%	11.60%	27.90%	18.59%	17.46%
	Auto – Two-wheelers	NA	22.73%	18.69%	14.87%	28.40%	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%
	Auto – Commercial vehicles	NA	26.34%	31.00%	12.75%	15.00%	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%
	Auto – Tractors	NA	20.46%	11.90%	19.59%	26.80%	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%
	Infra – Coal	NA	7.60%	1.40%	-9.50%	-9.00%	-4.00%	1.40%	3.10%	3.60%	2.10%	-8.50%
	Infra – Electricity	NA	9.00%	11.40%	11.20%	5.50%	0.80%	2.30%	5.20%	6.30%	-2.20%	-7.6%
	Infra – Steel	NA	2.90%	5.60%	5.10%	4.70%	9.60%	9.90%	11.50%	10.10%	6.10%	6.70%
	Infra – Cement	NA	13.10%	9.90%	8.40%	8.30%	4.70%	9.10%	11.30%	13.70%	14.50%	5.30%

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