Daily Market Monitor

October 07, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	6 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22776	0.98	-4.69	1.99	-9.18
BSE Sensex	73068	0.95	-4.51	1.56	-10.66
BSE 100	24383	0.84	-4.80	4.17	-7.22
BSE 200	10714	0.90	-4.77	5.50	-5.89
BSE 500	34727	0.98	-4.56	7.91	-4.54
BSE SmallCap	57705	1.45	-1.75	33.52	8.33
BSE MidCap	45938	0.99	-5.76	13.32	-0.11
BSE LargeCap	9015	0.93	-4.48	4.47	-6.79
Sectoral indices					
BSE IT	27042	-0.34	-8.02	-3.16	-20.95
BSE Oil & Gas	24935	1.21	-4.72	-2.44	-8.86
BSE FMCG	17157	1.57	-1.79	2.28	-15.32
BSE Auto	56763	0.37	-7.56	7.89	-5.24
BSE Bankex	62118	0.53	-4.29	9.79	-2.07
BSE Teck	14425	0.36	-5.83	-2.05	-14.69
BSE Capital Goods	75750	1.79	-2.72	17.91	8.89
BSE Consumer Durable	58616	0.57	-7.32	11.40	-0.04

Turnover (Rs Cr)	6 Oct	5 Oct
BSE Cash	9498	10545
NSE Cash	109748	116073
NSE F&O	47395554	28899376

Rs. Cr (Equity)	FII Inv 5 Oct	MF Inv 21 Sep	DII Inv 6 Oct
Buy	16,921	10,087	20,146
Sell	21,084	8,900	15,057
Net	-4,163	1,187	5,089
Net (MTD)	-13,444	27,619	20,312
Net (YTD)	-280,715	398,622	652,295

	6 Oct	1Day	Month ago	Year ago
USD	96.43	96.28	94.49	88.79
GBP	127.38	127.22	127.97	119.33
Euro	108.07	107.79	109.88	103.99
100 Yen	60.96	61.03	60.52	59.09

Indian markets

- Indian equity benchmarks closed higher on Tuesday, driven by gains in banking stocks and positive corporate business updates, while favourable global cues and optimism ahead of the RBI's policy decision boosted investor sentiment.
- The top gainers were Trent, BSE, Kotak Mahindra Bank, Nestlé India and Hindustan Unilever, up 3.09-12.64%.
- The top losers were Coal India, Tech Mahindra, Max Healthcare Institute, Tata Motors Passenger Vehicles and UltraTech Cement, down 1.70-3.31%.

Indian debt

- The interbank call-money rate ended higher at 5.20% on Tuesday compared to 4.80% on Monday.
- Government bond prices ended higher on Tuesday, ahead of the RBI policy outcome on October 7, with focus on liquidity measures and policy guidance.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.19% on Tuesday compared to 7.21% on Monday.

Indian Rupee

- The spot rupee weakened against the United States dollar on Tuesday, weighed down by foreign fund outflows, while markets awaited the Reserve Bank of India's (RBI) policy decision on Wednesday for cues on guidance and interest rates.

Regulatory

- RBI accepted Rs 1.92 lakh crore in its 1-day VRRR auction on October 6, 2026, against a notified amount of ₹2.5 lakh crore. The cut-off and weighted average rate stood at 5.24%..

Economy and Government

- India's HSBC Composite PMI rose to 55.9 in September 2026 compared to 54.3 in August 2026 while Services PMI edged up to 55.2 from 54.1.
- World Bank raised India's FY27 GDP growth forecast to 7.1% from 6.6%, citing strong domestic demand, resilient industrial and services activity, and stronger-than-expected economic performance.
- India and Sri Lanka agreed to enhance the supply of food and essential commodities through cooperative networks, strengthening bilateral cooperation in the cooperative sector.
- The Maharashtra Government imposed a statewide 10% water cut from October 16 to manage drought-related water shortages and safeguard drinking water supplies.
- The Ministry of Rural Development expanded the VB-G RAM-G rural jobs scheme by 41%, increasing the number of permissible works to 375 to support rural employment and infrastructure creation.
- The Union Cabinet approved a Rs 10,000 crore commitment to the SME Growth Fund, aimed at improving access to capital for small and medium enterprises.
- The Union Cabinet approved the creation of a new body to integrate transport and logistics planning, supporting more efficient infrastructure development and multimodal connectivity.

Domestic Debt Market Indicators

Instrument	6 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	4.80%	5.00%	5.25%	7.00%	5.00%
3-Month T-Bill	5.51%	5.48%	5.20%	5.26%	5.40%	5.43%
6-Month T-Bill	5.96%	5.94%	5.60%	5.46%	5.51%	5.54%
1-year T-Bill	6.12%	6.12%	5.88%	5.62%	5.70%	5.55%
3-Month CD	6.50%	6.50%	5.80%	6.40%	7.35%	5.84%
6-Month CD	7.17%	7.16%	6.43%	6.69%	7.30%	6.18%
1-year CD	7.40%	7.40%	7.15%	7.00%	7.25%	6.33%
3-Month CP	7.25%	7.25%	6.65%	6.75%	7.75%	6.51%
6-Month CP	7.70%	7.60%	6.98%	7.03%	7.65%	6.70%
1-year CP	7.90%	7.90%	7.60%	7.40%	7.60%	6.90%
1-year Gilt	6.15%	6.13%	5.84%	5.73%	5.82%	5.61%
3-year Gilt	6.76%	6.75%	6.27%	6.14%	6.43%	5.91%
5-year Gilt	7.09%	7.07%	6.63%	6.38%	6.90%	6.12%
1-year AAA	7.77%	7.74%	7.46%	7.25%	7.57%	6.65%
3-year AAA	7.98%	7.98%	7.67%	7.24%	7.59%	6.89%
5-year AAA	8.01%	8.01%	7.70%	7.26%	7.67%	6.93%
10-year G-sec	7.20%	7.21%	6.96%	6.68%	7.02%	6.52%
Net LAF (Rs Cr)	530096	515659	1073185	119104	245161	158819
Forex reserves ($ bn)	747.56	765.90	740.80	666.93	642.49	700.24

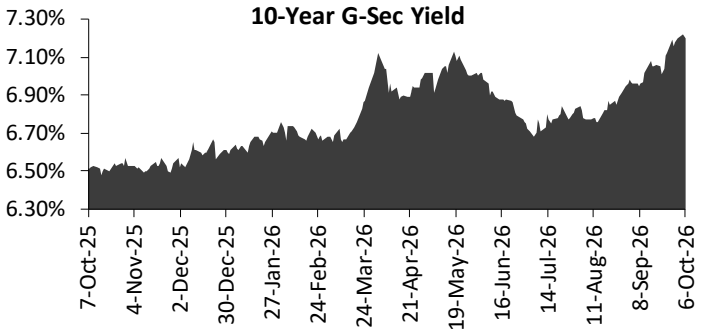
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.96	7.28	8.00	8.08	9.31	9.79
1 Year	6.15	7.77	8.49	8.57	9.80	10.28
3 Year	6.76	7.98	8.70	8.78	10.01	10.49
5 Year	7.09	8.01	8.83	8.91	10.14	10.62
10 Year	7.20	8.03	8.85	8.93	10.16	10.64

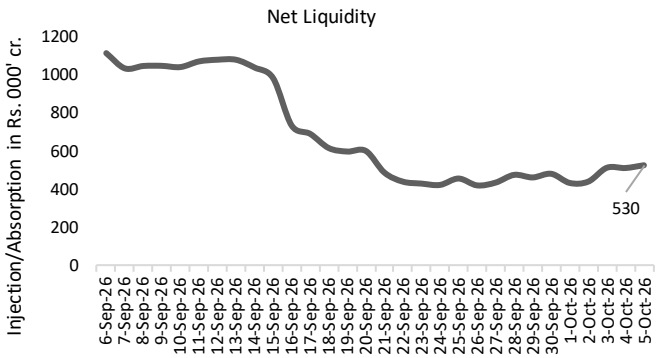
Rs. Cr (Debt)	FII Inv 5 Oct	MF Inv 21 Sep
Buy	788	23,724
Sell	556	25,486
Net	232	-1,762
Net (MTD)	285	-5,251
Net (YTD)	49,614	-590,039

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	55.1 (Sep-26)	54.2 (Jun-26)	57.7 (Sep-25)
India Service PMI	55.2 (Sep-26)	57.4 (Jun-26)	60.9 (Sep-25)
Bank Credit Growth*	-0.89% (Sep 15, 2026)		3.49% (Aug 31, 2026)
Bank Deposit Growth*	-0.26% (Sep 15, 2026)		1.73% (Aug 31, 2026)

Capital markets

- Swara Baby Products received SEBI approval for its proposed Rs 1,000 crore IPO.
- CurveT AI raised Rs 6 crore in a pre-seed funding round led by Merak Ventures to expand its AI capabilities and product development.
- Vinci raised $250 million, strengthening its position in the enterprise software segment.
- Marico increased its stake in the parent company of Plix to 84%, deepening its presence in the health and wellness sector.
- Type One Energy raised $200 million to develop what it aims to be the world's first commercial fusion reactor.





Global market indices	6 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51521.28	0.49	-3.54	11.18	10.34
Nikkei 225	70683.98	1.05	8.71	38.42	47.43
FTSE	10541.69	0.42	-2.67	3.59	11.21
Hang Seng	24280.56	1.00	-5.34	-2.05	-9.93
Taiwan	49822.55	0.22	7.03	57.06	86.18

Global debt	6 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.27	5.31	4.78	4.48	4.30	4.18
UK 10-Year (%)	5.40	5.43	5.13	4.80	4.88	4.74
German 10-Year (%)	3.48	3.49	3.34	2.95	3.01	2.72
Japan 10-Year (%)	3.09	3.09	2.91	2.83	2.35	1.69

Domestic	6 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	148473	0.19	-4.14	1.19	24.51
Silver (Rs / Kg)	222820	-0.60	-5.37	-3.18	49.71
Aluminium (Rs / Kg)	343	1.06	-1.68	-3.48	31.42
Copper (Rs / kg)	1424	0.32	0.83	21.59	43.80
Lead (Rs / kg)	197	-0.58	-4.10	-0.25	4.49
Zinc (Rs /Kg)	430	1.46	0.56	33.10	44.30
Nickel (Rs / kg)	1557	0.91	-3.84	-4.86	14.44

Global	6 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4130.20	-0.23	-8.08	-8.78	6.26
Silver (oz/$)	6098.00	0.94	-9.15	-13.47	27.07
Brent ($/bbl)	100.58	0.26	4.47	-15.01	53.63
NYMEX crude ($/bbl)	89.44	0.01	-2.23	-11.78	44.98

Upcoming market indicators

Date	Indicator	Previous
Oct 7	India RBI Interest Rate Decision	5.25%
Oct 8	Japan Current Account, Aug	¥2989B
Oct 12	India Inflation Rate, Sep	4.82%
Oct 14	India WPI Inflation, Sep	9.92%
Oct 15	Eurozone Inflation Rate YoY Final, Sep	3.2%

Global markets

- Wall Street stocks closed higher on Tuesday supported by growing optimism ahead of the upcoming corporate earnings season.
- 10-year US bond yield ended lower at 5.27% as oil prices eased and Treasury Secretary Scott Bessent insisted the government's debt load can be tamed.
- FTSE index closed higher on Tuesday, supported by sector specific gains and easing yields.
- Asian markets were trading mostly higher at 8.30 AM.
- The US trade deficit widened to $105.6 billion in August 2026 from a revised $92.8 billion in July, as imports rose to a record high.
- Imports surged by $17.2 billion to an all-time high of $420.8 billion, driven by higher purchases of industrial supplies and materials, particularly crude oil and non-monetary gold, along with increased imports of semiconductors and industrial machinery.
- Exports increased by $4.5 billion to $315.2 billion, supported by stronger shipments of industrial supplies, including crude oil and non-monetary gold, as well as capital goods such as semiconductors and computers.
- Eurozone S&P Global Construction PMI rose slightly to 43.4 in September 2026 compared to 43.0 in August 2026.
- Eurozone retail sales volumes rose by 0.8% in August 2026, compared to increase of 0.4% in July 2026.
- UK's S&P Global Construction PMI rose to 46.1 in September 2026 compared to 44.3 in August 2026.

Commodity

- Crude oil prices were largely steady, rising 1 cent to $89.44 per barrel on NYMEX, as losses due to potential supply disruptions in the Middle East cut short due to increasing crude exports from the region.
- Domestic gold prices rose due to weakness in the dollar.

Forthcoming results

NA	NA

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	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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