Daily Market Monitor

October 08, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	7 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22603	-0.76	-4.95	1.22	-9.98
BSE Sensex	72639	-0.59	-4.59	0.96	-11.34
BSE 100	24198	-0.76	-5.01	3.38	-8.08
BSE 200	10636	-0.73	-4.95	4.72	-6.74
BSE 500	34509	-0.63	-4.72	7.23	-5.29
BSE SmallCap	57671	-0.06	-2.03	33.44	8.42
BSE MidCap	45766	-0.37	-5.48	12.90	-0.93
BSE LargeCap	8948	-0.75	-15.04	3.69	-7.62
Sectoral indices					
BSE IT	26731	-1.15	-7.12	-4.28	-21.66
BSE Oil & Gas	24749	-0.74	-4.87	-3.17	-9.97
BSE FMCG	17058	-0.58	-1.72	1.69	-15.39
BSE Auto	55961	-1.41	-8.89	6.36	-6.81
BSE Bankex	62060	-0.09	-3.95	9.68	-2.01
BSE Teck	14386	-0.27	-4.99	-2.32	-15.12
BSE Capital Goods	75227	-0.69	-3.17	17.10	8.21
BSE Consumer Durable	57542	-1.83	-8.49	9.36	-2.14

Turnover (Rs Cr)	7 Oct	6 Oct
BSE Cash	11077	9498
NSE Cash	115269	109748
NSE F&O	10373180	47395554

Rs. Cr (Equity)	FII Inv 6 Oct	MF Inv 6 Oct	DII Inv 7 Oct
Buy	12,592	4,340	18,707
Sell	15,042	2,859	14,110
Net	-2,450	1,481	4,597
Net (MTD)	-15,894	14,560	24,909
Net (YTD)	-283,165	439,450	656,891

	7 Oct	1Day	Month ago	Year ago
USD	96.62	96.43	94.45	88.73
GBP	127.98	127.38	127.68	119.38
Euro	108.45	108.07	109.67	103.71
100 Yen	61.01	60.96	60.62	58.90

Indian markets

- Indian equity benchmarks closed lower on Wednesday after the RBI raised the repo rate and shifted its policy stance to 'calibrated tightening', signalling a tighter monetary policy environment.
- The top losers were Titan Company, Adani Enterprises, Hindalco Industries, JSW Steel and Bharat Electronics, down 2.35-3.80%.
- The top gainers were Kotak Mahindra Bank, BSE, Bharti Airtel, ICICI Bank and Coal India, up 0.69-1.88%.

Indian debt

- The interbank call-money rate ended higher at 5.40% on Wednesday compared to 5.20% on Tuesday.
- Government bond prices ended lower on Wednesday after the RBI raised the repo rate by 25 bps, its first-rate hike in nearly four years, and signalled a tighter policy stance amid persistent inflation concerns.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.24% on Wednesday compared to 7.19% on Tuesday.

Indian Rupee

- The spot rupee weakened against the United States dollar on Wednesday after the Reserve Bank of India's (RBI) 25-basis-point repo rate hike to 5.5% failed to provide a strong policy signal. A firmer greenback and persistent foreign fund outflows further dampened market sentiment.

Regulatory

- Reserve Bank of India (RBI) formed the Financial Market Consultative Committee (FMCC) to enhance dialogue with market participants and improve financial market policymaking.
- Reserve Bank of India (RBI) has enabled interoperability among Account Aggregators, allowing seamless consent-based financial data sharing across platforms and strengthening India's digital financial infrastructure.
- RBI Governor Sanjay Malhotra noted that system liquidity remained in surplus, averaging Rs 5.9 lakh crore since the August policy meeting, while the RBI conducted 55 variable rate reverse repo auctions and open market operation sales of Rs 1 lakh crore to absorb surplus liquidity.
- RBI Governor Sanjay Malhotra expects India's external sector to remain resilient, supported by a robust services trade surplus, strong inward remittance flows and the implementation of the India-UK trade agreement, along with recently concluded bilateral trade arrangements with key trading partners.
- RBI Governor Sanjay Malhotra stated that small merchant discount rates on select UPI transactions are unlikely to significantly impact transaction volumes.
- RBI Governor Sanjay Malhotra said the economic benefits of RBI's policy measures take precedence over potential costs to the central bank, emphasizing the focus on overall economic stability.

Economy and Government

- RBI's Monetary Policy Committee (MPC) voted unanimously to increase the policy repo rate by 25 basis points (bps) to 5.50%.
- The RBI revised its FY2026-27 (FY27) real GDP growth forecast upward by 40 basis points to 7.1%.

Domestic Debt Market Indicators

Instrument	7 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.20%	5.05%	5.25%	7.00%	5.00%
3-Month T-Bill	5.52%	5.51%	5.20%	5.25%	5.40%	5.41%
6-Month T-Bill	6.04%	5.96%	5.59%	5.45%	5.51%	5.54%
1-year T-Bill	6.17%	6.12%	5.87%	5.63%	5.70%	5.55%
3-Month CD	6.50%	6.50%	5.86%	6.55%	7.35%	5.84%
6-Month CD	7.17%	7.17%	6.39%	6.85%	7.30%	6.19%
1-year CD	7.45%	7.40%	7.10%	7.15%	7.25%	6.33%
3-Month CP	7.25%	7.25%	6.70%	6.90%	7.75%	6.51%
6-Month CP	7.70%	7.70%	6.88%	7.20%	7.65%	6.67%
1-year CP	7.90%	7.90%	7.50%	7.55%	7.60%	6.90%
1-year Gilt	6.16%	6.15%	5.87%	5.78%	5.82%	5.60%
3-year Gilt	6.80%	6.76%	6.29%	6.14%	6.43%	5.90%
5-year Gilt	7.11%	7.09%	6.62%	6.36%	6.90%	6.11%
1-year AAA	7.74%	7.77%	7.46%	7.30%	7.57%	6.62%
3-year AAA	7.98%	7.98%	7.67%	7.29%	7.59%	6.86%
5-year AAA	8.01%	8.01%	7.70%	7.30%	7.67%	6.90%
10-year G-sec	7.24%	7.20%	6.96%	6.70%	7.02%	6.51%
Net LAF (Rs Cr)	498716	530096	1036486	125832	245161	148046
Forex reserves ($ bn)	747.56	765.90	740.80	666.93	642.49	700.24

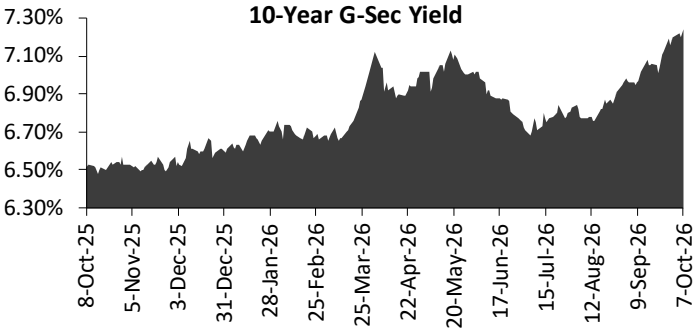
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.04	7.24	7.96	8.04	9.27	9.75
1 Year	6.16	7.74	8.46	8.54	9.77	10.25
3 Year	6.80	7.98	8.70	8.78	10.01	10.49
5 Year	7.11	8.01	8.83	8.91	10.14	10.62
10 Year	7.24	8.03	8.85	8.93	10.16	10.64

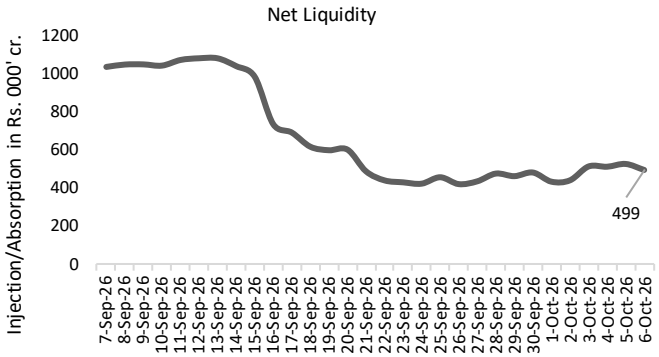
Rs. Cr (Debt)	FII Inv 6 Oct	MF Inv 6 Oct
Buy	2,169	5,490
Sell	64	5,246
Net	2,105	244
Net (MTD)	2,390	4,449
Net (YTD)	51,718	-603,828

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

- TD Power Systems launched a QIP with a floor price of Rs 775.35 per share to raise up to Rs 600 crore.
- Landmark Group raised Rs 330 crore in construction finance from State Bank of India (SBI) to support its real estate development activities.
- Zomint, a wealthtech startup, raised Rs 36 crore in its maiden funding round led by Lightspeed Venture Partners and Prime Venture Partners.
- ByteXL raised $9 million in a funding round led by Elevar Equity to expand its edtech offerings and strengthen its presence in the skilling and higher-education segment.





Global market indices	7 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51179.87	-0.66	-4.18	10.44	9.82
Nikkei 225	70035.71	-0.92	5.48	37.15	46.06
FTSE	10458.5	-0.79	-3.36	2.77	10.28
Hang Seng	24130.50	-0.62	-5.05	-2.65	-10.49
Taiwan	49806.37	-0.03	5.24	57.00	83.03

Global debt	7 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.28	5.27	4.78	4.55	4.30	4.14
UK 10-Year (%)	5.45	5.40	5.18	4.86	4.88	4.72
German 10-Year (%)	3.48	3.48	3.38	2.99	3.01	2.71
Japan 10-Year (%)	3.11	3.09	2.91	2.84	2.35	1.67

Domestic	7 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147767	-0.48	-3.23	0.70	23.20
Silver (Rs / Kg)	220866	-0.88	-4.66	-4.03	47.79
Aluminium (Rs / Kg)	342	-0.20	-2.28	-3.67	31.15
Copper (Rs / kg)	1429	0.38	0.70	22.05	43.19
Lead (Rs / kg)	198	0.89	-1.78	0.63	7.91
Zinc (Rs /Kg)	433	0.69	0.42	34.01	46.15
Nickel (Rs / kg)	1557	-0.02	-4.20	-4.88	14.89

Global	7 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	147767	-0.48	-3.23	0.70	23.20
Silver (oz/$)	220866	-0.88	-4.66	-4.03	47.79
Brent ($/bbl)	342	-0.20	-2.28	-3.67	31.15
NYMEX crude ($/bbl)	1429	0.38	0.70	22.05	43.19

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 19	China Fixed Asset Investment (YTD), Sep	-7.2%

Global markets

- Wall Street stocks closed lower on Wednesday as rising long-term US Treasury yields reignited concerns over inflation and government debt, weighing on investor sentiment.
- 10-year US bond yield ended higher at 5.28% amid re-ignited worries that inflation may prove more stubborn than expected.
- FTSE index closed lower on Wednesday, weighed down by losses in financial stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- UK RICS Residential Market Survey showed that the house price balance deteriorated to -32% in September 2026 compared to -28% in August 2026.
- Japan's coincident economic index fell to 118.7 in August 2026 compared to a final 120.6 in the prior month.
- Japan's leading economic index increased to 118.0 in August 2026 compared to 117.6 in July 2026.

Commodity

- Crude oil prices fell $1.16 to $88.28 per barrel on NYMEX, after the International Energy Agency agreed to accelerate the release of oil stockpiles and prioritize diesel supplies, helped ease supply concerns.
- Domestic gold prices ended lower due to strong dollar index.

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	Sep-26	Aug-26	July-26	June-26	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25
Debt Indicators	Currency in circulation (Rs billion)	43027	42883	42870	43062	42952	42413	41498	40445	39800	39079	38551
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%
	10-year G-sec yield	7.18%	6.95%	6.83%	6.76%	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%
	Call rate	4.85%	4.75%	5.37%	5.45%	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%
	Forex reserves ($ billion; mthly. avg.)	770	724	680	673	688	700	703	724	696	692	688
	GDP	NA	NA	NA	7.80%			8.60%			7.70%	
	Fiscal deficit (Rs billion)	NA	710.249	4551.144	3078.33	1623.54	3623.03	2665.2	2712.42	1255.65	-1208.29	1515.27
	IIP, %y/y	NA	0.08	7.40%	8.80%	5.00%	4.90%	3.00%	4.40%	4.80%	8.00%	7.20%
	Exports, $ billion	NA	43.81	44.24	40.41	45.2	43.56	38.92	36.61	36.56	38.51	38.13
	Imports, $ billion	NA	70.67	76.22	70.84	73.41	71.94	59.59	63.71	71.24	63.55	62.66
	Manufacturing PMI	55.1	52.80	53.50	54.20	55.00	54.70	53.90	56.9	55.4	55	56.6
	Services PMI	55.2	54.10	53.30	57.40	58.90	58.80	57.5	58.1	58.5	58	59.8
	GST collections (Rs crore)	203521	199853	211205	194,812	194,184	242,702	200064	183609	193384	174550	170276
	India crude oil import (mbpd)	NA	19.014	21.405	19.592	22.421	18.468	19.39	20.13	21.09	21.59	21.24
Sector update	Auto – Passenger vehicles	NA	34.31%	31.37%	23.00%	27.09%	26.31%	17.10%	11.10%	11.60%	27.90%	18.59%
	Auto – Two-wheelers	NA	10.95%	22.73%	18.69%	14.87%	28.40%	19.30%	35.20%	26.20%	39.40%	21.17%
	Auto – Commercial vehicles	NA	29.87%	26.34%	31.00%	12.75%	15.00%	13.60%	23.40%	27.30%	28.00%	24.16%
	Auto – Tractors	NA	7.66%	20.46%	11.90%	19.59%	26.80%	29.10%	34.20%	43.00%	37.10%	30.08%
	Infra – Coal	NA	-3.80%	7.60%	1.40%	-9.50%	-9.00%	-4.00%	1.40%	3.10%	3.60%	2.10%
	Infra – Electricity	NA	11.60%	8.40%	11.40%	11.20%	5.50%	0.80%	2.30%	5.20%	6.30%	-2.20%
	Infra – Steel	NA	3.40%	1.90%	5.60%	5.10%	4.70%	9.60%	9.90%	11.50%	10.10%	6.10%
	Infra – Cement	NA	12.50%	12.70%	9.90%	8.40%	8.30%	4.70%	9.10%	11.30%	13.70%	14.50%

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