Daily Market Monitor

October 12, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	9 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22520	1.30	-3.89	0.85	-10.57
BSE Sensex	72472	1.23	-3.07	0.73	-11.80
BSE 100	24077	1.19	-4.41	2.86	-8.73
BSE 200	10559	1.15	-4.74	3.97	-7.57
BSE 500	34192	1.06	-4.81	6.25	-6.29
BSE SmallCap	56359	0.37	-4.22	30.41	6.21
BSE MidCap	45197	1.07	-6.61	11.49	-2.17
BSE LargeCap	8887	1.14	-4.38	2.99	-8.42
Sectoral indices					
BSE IT	27407	2.91	-1.42	-1.86	-21.66
BSE Oil & Gas	24158	0.24	-6.25	-5.48	-11.83
BSE FMCG	17056	2.02	-1.23	1.68	-15.29
BSE Auto	55146	0.84	-9.79	4.81	-7.06
BSE Bankex	62159	1.00	-2.47	9.86	-1.74
BSE Teck	14546	2.10	-1.15	-1.23	-15.94
BSE Capital Goods	73292	0.46	-6.70	14.08	5.87
BSE Consumer Durable	57153	0.80	-8.37	8.62	-3.39

Turnover (Rs Cr)	9 Oct	8 Oct
BSE Cash	9594	20444
NSE Cash	100417	117091
NSE F&O	18677620	11400527

Rs. Cr (Equity)	FII Inv 8 Oct	MF Inv 6 Oct	DII Inv 9 Oct
Buy	16,107	4,340	15,627
Sell	28,991	2,859	10,883
Net	-12,884	1,481	4,743
Net (MTD)	-34,934	14,560	40,355
Net (YTD)	-302,205	439,450	672,338

	9 Oct	1Day	Month ago	Year ago
USD	96.61	96.77	95.15	88.79
GBP	127.89	127.74	129.02	118.89
Euro	108.47	108.38	110.78	103.25
100 Yen	61.08	61.19	62.17	58.06

Indian markets

- Indian equity benchmarks closed higher on Friday, helped by easing geopolitical concerns after United States President Trump ruled out immediate strikes on Iran.
- The top gainers were Apollo Hospital, ITC, Eicher Motors, TCS and HCL Technologies, up 3.38-4.72%.
- The top losers were BSE, Reliance, JSW Steel and Cipla, down 0.44-1.43%.

Indian debt

- The interbank call-money rate ended lower at 5.00% on Friday compared to 5.45% on Thursday.
- Government bond prices ended lower on Friday as volatile crude oil prices and expectations of further RBI policy tightening pressured the market.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.30% on Friday compared to 7.29% on Thursday.

Indian Rupee

- The rupee ended lower against the United States (US) dollar on Monday as investors grew cautious ahead of the US-Iran ceasefire expiry amid resurfacing Middle East tensions.

Regulatory

- The Reserve Bank of India (RBI) introduced a special dollar window for oil marketing companies and eased certain forex derivatives norms to support currency market stability.
- The RBI tightened liquidity conditions by raising the daily CRR maintenance requirement to 99% following its recent policy rate hike.
- SEBI Chairman Tuhin Kanta Pandey said the regulator will issue closing auction guidelines within a week to strengthen market efficiency and price discovery.

Economy and Government

- RBI data showed India's foreign exchange reserves declined by $12.95 billion to reach $734.6 billion during the week ended October 2
- Prime Minister Narendra Modi inaugurated and laid the foundation stone for projects worth over Rs 13,000 crore in Tamil Nadu, reaffirming support for the state's economic development.
- Commerce Minister Piyush Goyal said changing global circumstances will influence the final contours of the proposed India-US trade agreement.
- Ministry of Finance retained the interest rate on the General Provident Fund (GPF) and other government provident funds at 7.1% for the October-December 2026 quarter.
- GST Council proposes 5% GST rate for EV-based transport and rental services.
- According to data from the Goods and Services Tax Network (GSTN) E-way bill generation in September grew 7.21% year-on-year (Y-o-Y) hitting a record 141.53 million.

Domestic Debt Market Indicators

Instrument	9 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.45%	5.10%	5.34%	7.00%	5.75%
3-Month T-Bill	5.44%	5.47%	5.17%	5.27%	5.40%	5.43%
6-Month T-Bill	6.08%	6.07%	5.57%	5.46%	5.51%	5.52%
1-year T-Bill	6.17%	6.16%	5.87%	5.61%	5.70%	5.53%
3-Month CD	6.40%	6.45%	5.90%	6.70%	7.35%	5.95%
6-Month CD	7.15%	7.19%	6.45%	6.85%	7.30%	6.19%
1-year CD	7.50%	7.50%	7.10%	7.20%	7.25%	6.37%
3-Month CP	7.10%	7.10%	6.70%	7.00%	7.75%	6.53%
6-Month CP	7.70%	7.70%	6.86%	7.27%	7.65%	6.69%
1-year CP	7.95%	7.95%	7.50%	7.57%	7.60%	6.90%
1-year Gilt	6.22%	6.22%	5.83%	5.73%	5.82%	5.59%
3-year Gilt	6.82%	6.77%	6.31%	6.20%	6.43%	5.91%
5-year Gilt	7.11%	7.09%	6.63%	6.43%	6.90%	6.13%
1-year AAA	7.78%	7.79%	7.37%	7.39%	7.57%	6.62%
3-year AAA	8.02%	8.02%	7.67%	7.37%	7.59%	6.86%
5-year AAA	8.05%	8.05%	7.70%	7.40%	7.67%	6.90%
10-year G-sec	7.30%	7.29%	6.96%	6.75%	7.02%	6.52%
Net LAF (Rs Cr)	388016	423481	1049685	110894	245161	155851
Forex reserves ($ bn)	734.61	747.56	740.80	666.93	642.49	700.24

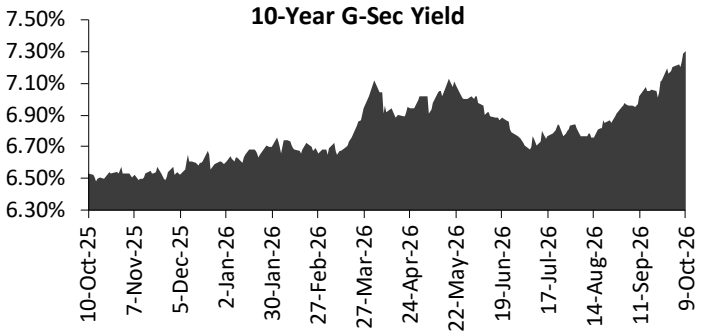
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.08	7.16	7.88	7.96	9.19	9.67
1 Year	6.22	7.78	8.50	8.58	9.81	10.29
3 Year	6.82	8.02	8.74	8.82	10.05	10.53
5 Year	7.11	8.05	8.87	8.95	10.18	10.66
10 Year	7.30	8.07	8.89	8.97	10.20	10.68

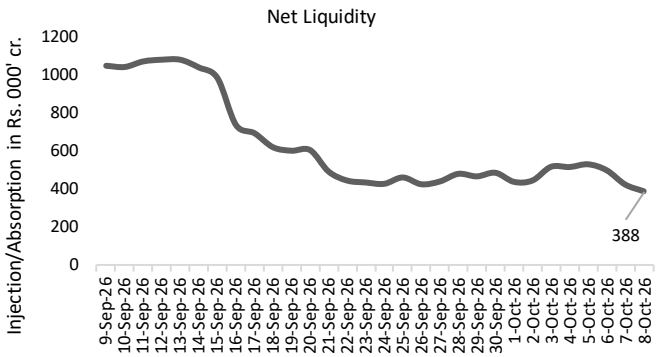
Rs. Cr (Debt)	FII Inv 8 Oct	MF Inv 6 Oct
Buy	498	5,490
Sell	988	5,246
Net	-490	244
Net (MTD)	5,398	4,449
Net (YTD)	54,726	-603,828

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*	2.80% (Sep 30, 2026)	-0.89% (Sep 15, 2026)	
Bank Deposit Growth*	2.98% (Sep 30, 2026)	-0.26% (Sep 15, 2026)	

Capital markets

- Cochin Shipyard plans to invest around Rs 6,000 crore in two projects pertaining to shipbuilding and repair work.
- NCC secured Rs 1,286 crore road project order in Telangana.
- JM Frictech India Ltd (JMI) invested around Rs 50 crore in setting up its fourth manufacturing facility in Chandigarh
- NTPC invited Expressions of Interest (EoI) for up to 26% equity participation in its co-generation power projects.
- Suzlon Energy plans to invest Rs 550 crore to establish three AI-powered wind turbine blade manufacturing facilities by 2027.
- The Airports Authority of India (AAI) launched a Rs 165 crore project to automate security tray movement systems at airports and improve passenger processing efficiency.





Global market indices	9 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51654.95	0.83	-1.39	11.47	11.43
Nikkei 225	69030.92	-0.02	5.97	35.19	42.10
FTSE	10552.05	1.06	-1.11	3.69	10.96
Hang Seng	24211.35	1.79	-4.21	-2.33	-9.50
Taiwan	Closed	NA	NA	NA	NA

Global debt	9 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.24	5.22	4.83	4.54	4.30	4.14
UK 10-Year (%)	5.44	5.43	5.26	4.90	4.88	4.75
German 10-Year (%)	3.49	3.49	3.44	3.05	3.01	2.70
Japan 10-Year (%)	3.02	3.09	2.89	2.88	2.35	1.69

Domestic	9 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	149430	1.21	-2.64	1.84	21.86
Silver (Rs / Kg)	221109	1.84	-6.01	-3.92	38.63
Aluminium (Rs / Kg)	340	0.12	-4.40	-4.40	27.42
Copper (Rs / kg)	1445	0.17	0.82	23.37	42.67
Lead (Rs / kg)	199	-0.30	-0.23	0.74	5.72
Zinc (Rs /Kg)	436	0.38	-0.22	34.98	44.99
Nickel (Rs / kg)	1549	-0.55	-4.62	-5.38	12.68

Global	9 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4131.52	0.42	-5.97	-8.75	2.05
Silver (oz/$)	5916.00	-1.43	-10.93	-16.05	19.71
Brent ($/bbl)	104.72	0.42	3.47	-11.52	60.56
NYMEX crude ($/bbl)	91.85	0.39	-4.37	-9.40	49.33

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 20	UK Inflation Rate, Sep	3.1%

Global markets

- Wall Street stocks closed higher on Friday, as investors turned their focus on the upcoming Q3 earnings season and key inflation data releases, which are expected to provide further clues on the Federal Reserve's future policy path.
- 10-year US bond yield ended higher at 5.24% as high oil prices fuel inflation concerns and worries over the country's growing public debt.
- FTSE index closed higher on Friday, as retreating gilt yields improved investor sentiment.
- Asian markets were trading mostly higher at 8.30 AM.
- US Michigan 1-Year Inflation Expectations remained at 4.7% in October 2026 for the second consecutive month, maintaining the highest level since May.
- US Michigan Consumer Expectations improved to 47.3 in October 2026 from 46.3 in September.
- US consumer sentiment index declined to 46.3 in early October 2026 according to preliminary estimates, reaching its lowest level since May's record low and falling below market expectations of 47.6.
- US Michigan 5-Year Inflation Expectations increased for the second consecutive month to 3.5% in October 2026, reaching its highest level since May, up from 3.4% in September.

Commodity

- Crude oil prices rose by 36 cents to $91.85 per barrel as Hurricane Isaias disrupted US Gulf of Mexico production and prompted oil companies to shut more than 70% of offshore crude output, heightening supply concerns.
- Domestic gold prices ended higher due to safe haven demand following concerns over global growth.

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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