Daily Market Monitor

October 13, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	12 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22363	-0.70	-4.42	0.14	-11.56
BSE Sensex	71925	-0.76	-3.82	-0.03	-12.82
BSE 100	23953	-0.52	-4.69	2.33	-9.60
BSE 200	10515	-0.42	-4.78	3.54	-8.32
BSE 500	34125	-0.20	-4.61	6.04	-6.84
BSE SmallCap	56898	0.96	-2.95	31.65	6.59
BSE MidCap	45393	0.43	-5.52	11.98	-2.09
BSE LargeCap	8843	-0.50	-4.52	2.47	-9.22
Sectoral indices					
BSE IT	27220	-0.68	-2.17	-2.53	-22.20
BSE Oil & Gas	24077	-0.33	-5.94	-5.80	-12.01
BSE FMCG	16828	-1.34	-1.99	0.32	-16.82
BSE Auto	55562	0.75	-7.99	5.60	-6.82
BSE Bankex	61861	-0.48	-3.38	9.33	-3.15
BSE Teck	14401	-1.00	-2.37	-2.22	-16.83
BSE Capital Goods	74254	1.31	-4.24	15.58	6.76
BSE Consumer Durable	57113	-0.07	-8.37	8.54	-4.14

Turnover (Rs Cr)	12 Oct	9 Oct
BSE Cash	10478	9594
NSE Cash	96863	100417
NSE F&O	27030964	18677620

Rs. Cr (Equity)	FII Inv 9 Oct	MF Inv 9 Oct	DII Inv 12 Oct
Buy	10,907	11,957	15,507
Sell	14,158	7,535	12,462
Net	-3,251	4,421	3,045
Net (MTD)	-38,185	33,807	43,400
Net (YTD)	-305,456	458,697	675,383

	12 Oct	1Day	Month ago	Year ago
USD	95.75	96.61	95.72	88.69
GBP	126.92	127.89	129.45	118.01
Euro	107.30	108.47	111.15	102.62
100 Yen	60.46	61.08	62.14	58.02

Indian markets

- Indian equity benchmarks closed lower on Monday, as concerns over inflation—driven by higher crude oil prices and a weaker monsoon—outweighed the RBI's latest measures to support the currency, keeping investor sentiment subdued.
- The top gainers were Dr. Reddy's Laboratories, Bajaj Auto, Tata Motors Passenger Vehicles, Bharat Electronics and BSE, up 1.31-2.71%.
- The top losers were Apollo Hospitals Enterprise, ITC, Tech Mahindra, Larsen & Toubro and Max Healthcare Institute, down 2.02-3.15%.

Indian debt

- The interbank call-money rate ended higher at 5.24% on Monday compared to 5.00% on Friday.
- Government bond prices ended lower on Monday as the RBI's liquidity-tightening measures and higher-than-expected inflation reinforced expectations of further rate hikes.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.39% on Monday compared to 7.30% on Friday.

Indian Rupee

- The spot rupee closed higher against the United States dollar on Monday, following interventions by the Reserve Bank of India (RBI) and government that eased greenback demand and boosted market sentiment. The gains were further supported by likely dollar sales by the central bank.

Regulatory

- SEBI notified a common advertising code for market intermediaries, while permitting celebrity endorsements for brands under specified guidelines.
- SEBI urged brokerage firms to join its return verification platform, aimed at improving the authenticity and transparency of performance claims.

Economy and Government

- India's retail inflation accelerated to 5.54% in September 2026 compared to 4.83% in August 2026, due to higher food and fuel prices.
- The International Monetary Fund (IMF) raised India's FY27 GDP growth forecast to 7.0%, citing resilient domestic demand and continued strength in economic activity, while warning that higher global oil prices remain a key downside risk to the outlook.
- The IMF noted that India's growth prospects remain among the strongest globally, supported by ongoing reforms, infrastructure investment, and robust domestic consumption, despite heightened external uncertainties.
- The World Bank projected that India's poverty rate could decline to 12.1% by 2028, reflecting sustained economic growth and improvements in living standards.
- The Central Government directed all states and Union Territories to ensure health service charges are prominently displayed at clinics and healthcare facilities to improve transparency.

TATA mutual fund

Domestic Debt Market Indicators

Instrument	12 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.24%	5.00%	5.10%	5.35%	7.00%	5.00%
3-Month T-Bill	5.60%	5.44%	5.18%	5.28%	5.40%	5.43%
6-Month T-Bill	6.09%	6.08%	5.60%	5.45%	5.51%	5.52%
1-year T-Bill	6.25%	6.17%	5.87%	5.61%	5.70%	5.55%
3-Month CD	6.50%	6.40%	6.03%	6.70%	7.35%	5.95%
6-Month CD	7.26%	7.15%	6.60%	6.87%	7.30%	6.19%
1-year CD	7.60%	7.50%	7.20%	7.15%	7.25%	6.37%
3-Month CP	7.10%	7.10%	6.75%	7.00%	7.75%	6.55%
6-Month CP	7.70%	7.70%	7.05%	7.27%	7.65%	6.72%
1-year CP	8.00%	7.95%	7.60%	7.57%	7.60%	6.90%
1-year Gilt	6.29%	6.22%	5.90%	5.81%	5.82%	5.58%
3-year Gilt	6.87%	6.82%	6.38%	6.16%	6.43%	5.91%
5-year Gilt	7.17%	7.11%	6.75%	6.38%	6.90%	6.14%
1-year AAA	7.87%	7.78%	7.52%	7.34%	7.57%	6.62%
3-year AAA	8.13%	8.02%	7.75%	7.37%	7.59%	6.86%
5-year AAA	8.15%	8.05%	7.79%	7.37%	7.67%	6.90%
10-year G-sec	7.39%	7.30%	7.02%	6.71%	7.02%	6.53%
Net LAF (Rs Cr)	377857	376436	1072702	113865	245161	143999
Forex reserves ($ bn)	734.61	747.56	785.71	674.19	642.49	699.96

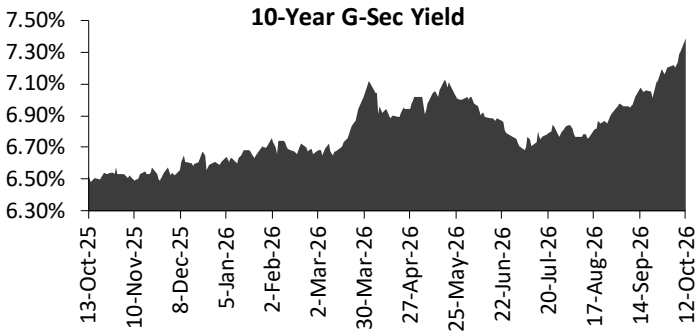
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.09	7.27	7.99	8.07	9.30	9.78
1 Year	6.29	7.87	8.59	8.67	9.90	10.38
3 Year	6.87	8.13	8.85	8.93	10.16	10.64
5 Year	7.17	8.15	8.97	9.05	10.28	10.76
10 Year	7.39	8.16	8.98	9.06	10.29	10.77

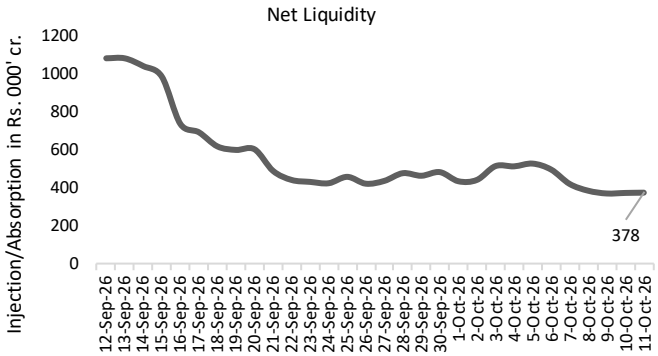
Rs. Cr (Debt)	FII Inv 9 Oct	MF Inv 9 Oct
Buy	149	17,557
Sell	546	12,939
Net	-398	4,618
Net (MTD)	5,000	11,720
Net (YTD)	54,328	-596,556

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	5.54% (Sep'26)	4.38% (Jun'26)	1.44% (Sep'25)
WPI	9.92% (Aug'26)	9.88% (May'26)	0.00% (Aug'25)
IIP	8.00% (Aug-26)	5.10% (May-26)	4.0% (Aug-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

- Emcure Pharmaceuticals approved the merger of its wholly owned subsidiaries, Zuventus Healthcare and Emcutix Biopharmaceuticals, into the parent company as part of its corporate restructuring and operational streamlining strategy.
- CreditAccess Grameen raised $175 million through a syndicated social loan, supporting its lending and financial inclusion initiatives.
- HCLTech signed a partnership with Anthropic to establish a dedicated AI business unit, expanding its artificial intelligence capabilities and offerings.
- L&T Technology Services (LTTS) launched an AI-native Engineering Intelligence (EI) Lab focused on digital manufacturing and physical AI applications.
- Tata Motors and Stellantis partnered to develop vehicles in India for more than 50 global markets, strengthening India's role in global automotive manufacturing.





Global market indices	12 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51850.55	0.38	-1.37	11.89	14.01
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	10656.28	0.99	0.05	4.72	13.03
Hang Seng	24271.20	0.25	-2.15	-2.09	-7.68
Taiwan	49301.96	-0.02	6.75	55.41	80.58

Global debt	12 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.23	5.24	4.96	4.56	4.30	4.05
UK 10-Year (%)	5.44	5.44	5.35	4.89	4.88	4.67
German 10-Year (%)	3.48	3.49	3.50	3.03	3.01	2.63
Japan 10-Year (%)	3.00	3.02	2.99	2.77	2.35	1.69

Domestic	12 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	148061	-0.92	-2.55	0.91	21.84
Silver (Rs / Kg)	220295	-0.37	-3.77	-4.28	33.92
Aluminium (Rs / Kg)	335	-1.38	-4.46	-5.73	25.70
Copper (Rs / kg)	1466	1.45	3.01	25.17	45.82
Lead (Rs / kg)	199	0.03	-1.49	0.76	7.67
Zinc (Rs /Kg)	436	-0.01	1.59	34.96	46.68
Nickel (Rs / kg)	1540	-0.55	-4.52	-5.90	13.54

Global	12 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4194.94	1.54	-3.91	-7.35	5.26
Silver (oz/$)	6095.00	3.03	-5.30	-13.51	21.46
Brent ($/bbl)	106.65	1.84	1.95	-9.89	70.01
NYMEX crude ($/bbl)	93.74	2.06	-6.31	-7.54	59.15

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 21	India Infrastructure Output, Sep	4.8%

Global markets

- Wall Street stocks ended mixed on Monday, with Nasdaq declining due to higher oil prices and losses in technology shares, while Dow Jones advanced on gains in energy and defensive sectors ahead of the earnings season and key inflation data releases.
- 10-year US bond yield ended marginally lower at 5.23% influenced by reports that the US Treasury may use its General Account to fund extended long-end debt buybacks.
- FTSE index closed higher on Monday, supported by gains in financial and healthcare stocks ahead of key US inflation and UK GDP data releases.
- Asian markets were trading mostly lower at 8.30 AM.
- Japan's producer prices rose 6.8% year-on-year in September 2026, compared to 7.6% in August 2026.
- Japan's bank lending grew by 5.3% year-on-year in September 2026 unchanged from the previous month.
- The International Monetary Fund (IMF) said continued AI-related investments could help sustain global growth at around 3%, with Asia expected to be a key beneficiary.

Commodity

- Crude oil prices rose by $1.89 to $93.74 per barrel as renewed attacks on Saudi Arabia heightened supply concerns.
- Domestic gold prices declined 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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