Daily Market Monitor

October 14, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	13 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22722	1.60	-2.89	1.75	-9.93
BSE Sensex	73034	1.54	-2.34	1.51	-11.29
BSE 100	24308	1.49	-3.27	3.85	-8.09
BSE 200	10660	1.38	-3.46	4.97	-6.87
BSE 500	34541	1.22	-3.44	7.33	-5.52
BSE SmallCap	56964	0.12	-2.83	31.81	7.18
BSE MidCap	45830	0.96	-4.61	13.06	-0.97
BSE LargeCap	8965	1.38	-3.20	3.89	-7.79
Sectoral indices					
BSE IT	28560	4.92	2.65	2.27	-17.63
BSE Oil & Gas	24199	0.51	-5.46	-5.32	-11.39
BSE FMCG	17033	1.22	-0.79	1.54	-15.10
BSE Auto	56259	1.26	-6.83	6.93	-5.51
BSE Bankex	62439	0.93	-2.48	10.35	-2.35
BSE Teck	14935	3.71	1.25	1.41	-13.38
BSE Capital Goods	74608	0.48	-3.78	16.13	8.18
BSE Consumer Durable	57970	1.50	-7.00	10.17	-2.09

Turnover (Rs Cr)	13 Oct	12 Oct
BSE Cash	9891	10478
NSE Cash	105779	96863
NSE F&O	63590869	27030964

Rs. Cr (Equity)	FII Inv 12 Oct	MF Inv 9 Oct	DII Inv 13 Oct
Buy	14,757	11,957	16,233
Sell	12,756	7,535	13,794
Net	2,001	4,421	2,439
Net (MTD)	-36,184	33,807	45,840
Net (YTD)	-303,455	458,697	677,822

	13 Oct	1Day	Month ago	Year ago
USD	95.25	95.75	95.72	88.78
GBP	125.92	126.92	129.45	118.64
Euro	106.43	107.30	111.15	103.21
100 Yen	60.17	60.46	62.14	58.48

Indian markets

- Indian equity benchmarks closed higher on Tuesday, buoyed by gains in information technology stocks and improved investor sentiment following Finance Minister Nirmala Sitharaman's remarks on long-term capital gains tax and securities transaction tax.
- The top gainers were HCL Technologies, Tata Consultancy Services, Shriram Finance, Tech Mahindra and Infosys, up 4.13-8.42%.
- The top losers were Kotak Mahindra Bank, Eternal, Maruti Suzuki India and Max Healthcare Institute, down 0.57-0.99%.

Indian debt

- The interbank call-money rate ended higher at 5.40% on Tuesday compared to 5.24% on Monday.
- Government bond prices ended higher on Tuesday supported by value buying though gains were capped by expectations of further rate hikes, and heavy debt supply.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.37% on Tuesday compared to 7.39% on Monday.

Indian Rupee

- The spot rupee closed higher against the United States dollar on Tuesday, supported by fresh measures by the Reserve Bank of India (RBI), aimed at easing pressure on the currency and likely intervention in the market.

Regulatory

- The Reserve Bank of India (RBI) extended its foreign exchange risk reserve requirement to banks' own rupee derivative hedging contracts, requiring lenders to maintain a 20% reserve on eligible positions, as part of measures aimed at moderating dollar demand and supporting the rupee.
- SEBI extended the relaxation allowing companies to revise the size of the fresh issue component in IPOs until March 2027, providing greater flexibility in fundraising plans amid changing market conditions.

Economy and Government

- India and Switzerland advanced their mobility partnership framework aimed at facilitating opportunities related to travel, education, and employment between the two countries.
- Prime Minister Narendra Modi said that India's growth story is inclusive and collaborative, emphasizing that the country does not grow at the expense of others.
- Finance Minister Nirmala Sitharaman said the Reserve Bank of India (RBI) may take additional measures, if required, to manage volatility in the foreign exchange market and support orderly currency movements.
- Nirmala Sitharaman said India remains well-positioned to navigate global challenges, highlighting the country's strong macroeconomic fundamentals and continued attractiveness to investors despite rupee volatility.
- The Ministry of Steel's draft National Steel Policy Vision 2047 proposes the use of AI-powered monitoring systems to detect sub-standard steel imports and strengthen trade safeguard mechanisms, supporting quality control and domestic industry protection.

Domestic Debt Market Indicators

Instrument	13 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.24%	5.10%	5.30%	7.00%	5.50%
3-Month T-Bill	5.59%	5.60%	5.18%	5.29%	5.40%	5.43%
6-Month T-Bill	6.08%	6.09%	5.60%	5.45%	5.51%	5.52%
1-year T-Bill	6.24%	6.25%	5.87%	5.61%	5.70%	5.54%
3-Month CD	6.50%	6.50%	6.03%	6.70%	7.35%	5.92%
6-Month CD	7.24%	7.26%	6.60%	6.95%	7.30%	6.18%
1-year CD	7.60%	7.60%	7.20%	7.15%	7.25%	6.38%
3-Month CP	7.10%	7.10%	6.75%	7.10%	7.75%	6.55%
6-Month CP	7.70%	7.70%	7.05%	7.35%	7.65%	6.71%
1-year CP	8.00%	8.00%	7.60%	7.60%	7.60%	6.90%
1-year Gilt	6.18%	6.29%	5.90%	5.75%	5.82%	5.59%
3-year Gilt	6.84%	6.87%	6.38%	6.18%	6.43%	5.90%
5-year Gilt	7.20%	7.17%	6.75%	6.41%	6.90%	6.16%
1-year AAA	7.87%	7.87%	7.52%	7.38%	7.57%	6.63%
3-year AAA	8.10%	8.13%	7.75%	7.37%	7.59%	6.86%
5-year AAA	8.12%	8.15%	7.79%	7.37%	7.67%	6.90%
10-year G-sec	7.36%	7.39%	7.02%	6.73%	7.02%	6.52%
Net LAF (Rs Cr)	335901	377857	1072702	139248	245161	129743
Forex reserves ($ bn)	734.61	747.56	785.71	674.19	642.49	699.96

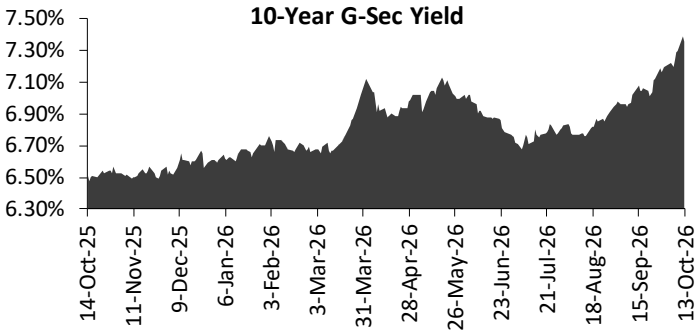
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.08	7.29	8.01	8.09	9.32	9.80
1 Year	6.18	7.87	8.59	8.67	9.90	10.38
3 Year	6.84	8.10	8.82	8.90	10.13	10.61
5 Year	7.20	8.12	8.94	9.02	10.25	10.73
10 Year	7.36	8.13	8.95	9.03	10.26	10.74

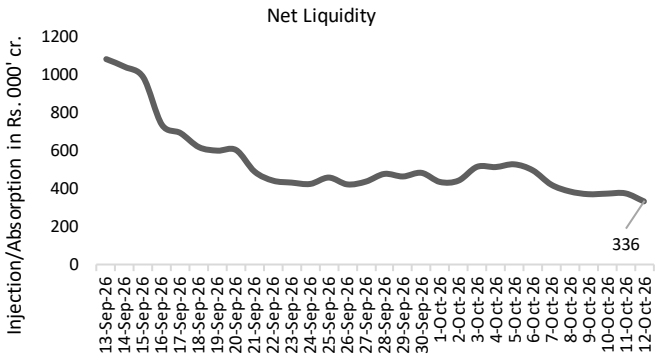
Rs. Cr (Debt)	FII Inv 12 Oct	MF Inv 9 Oct
Buy	297	17,557
Sell	180	12,939
Net	118	4,618
Net (MTD)	5,118	11,720
Net (YTD)	54,446	-596,556

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

- Vantrock plans to invest Rs 3,000 crore over the next four years to develop logistics and warehousing parks, expanding its footprint in India's warehousing and industrial infrastructure sector.
- Kalpataru Projects International Ltd (KPIL) secured new transmission and distribution (T&D) orders worth Rs 2,225 crore, strengthening its order book and power infrastructure business.
- Vimag Labs commenced production at its Haryana manufacturing facility and plans to invest Rs 50 crore to expand operations.
- Shyam Metalics Group secured strategic mining rights for the Phutamura coal block in Chhattisgarh through its investment in Alom Solar Private Limited, enhancing raw material security for its operations.
- Sun Pharmaceutical Industries approved a plan to raise up to Rs 10,000 crore through non-convertible debentures (NCDs) to support funding requirements and business expansion.





Global market indices	13 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51670.1	-0.35	-1.72	11.50	12.16
Nikkei 225	67777.52	-1.82	5.88	32.73	40.94
FTSE	10650.33	-0.06	0.00	4.66	12.79
Hang Seng	24345.22	0.30	-1.86	-1.79	-5.96
Taiwan	48341.31	-1.95	4.67	52.39	79.55

Global debt	13 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.21	5.23	4.96	4.62	4.30	4.05
UK 10-Year (%)	5.45	5.44	5.35	4.99	4.88	4.65
German 10-Year (%)	3.46	3.48	3.50	3.07	3.01	2.63
Japan 10-Year (%)	3.00	3.00	2.99	2.78	2.35	1.69

Domestic	13 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147617	-0.30	-2.84	0.60	18.90
Silver (Rs / Kg)	219038	-0.57	-4.32	-4.82	24.93
Aluminium (Rs / Kg)	330	-1.54	-5.93	-7.18	24.90
Copper (Rs / kg)	1448	-1.20	1.77	23.66	46.25
Lead (Rs / kg)	199	-0.08	-1.56	0.68	5.39
Zinc (Rs /Kg)	434	-0.38	1.20	34.45	46.75
Nickel (Rs / kg)	1532	-0.54	-5.03	-6.41	13.04

Global	13 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4166.57	-0.68	-4.56	-7.98	3.72
Silver (oz/$)	6025.00	-1.15	-6.39	-14.50	20.28
Brent ($/bbl)	105.69	-0.90	1.03	-10.70	66.91
NYMEX crude ($/bbl)	94.14	0.43	-5.91	-7.14	58.25

Upcoming market indicators

Date	Indicator	Previous
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%
Oct 22	Eurozone Consumer Confidence Flash, Oct	-16.5

Global markets

- Wall Street stocks ended lower on Tuesday, weighed down by weakness in semiconductor stocks, while investors assessed the start of the earnings season following major bank results.
- 10-year US bond yield ended flat at 4.26% amid uncertainty around geopolitical tensions.
- FTSE index closed flat on Tuesday, as weakness in mining stocks offset gains in financial shares supported by falling bond yields.
- Asian markets were trading mostly higher at 8.30 AM.
- US private-sector employment, as measured by the ADP Employment Change, increased by 24.75 thousand in the week ended September 26.
- US NFIB Small Business Optimism Index declined to 97.9 in September 2026 from 98.7 in August.
- US existing home sales rose 1.5% month-over-month in September 2026 compared to a 3.2% decline in August 2026.
- China's annual inflation rate edged up to 0.9% in September 2026 compared to 0.8% in August 2026.
- China annual producer prices accelerated to 5.0% in September 2026 compared to 3.8% in August 2026.
- China's trade surplus widened to $133.53 billion in September 2026 from $88.72 billion a year earlier.

Commodity

- Crude oil prices rose by 40 cents to $94.14 per barrel as supply risks remained elevated in the U.S. market due to ongoing disruptions in the Gulf region and continued geopolitical tensions following attacks involving Saudi Arabia and Yemen.
- Domestic gold prices ended lower due to profit booking at higher level.

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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