Daily Market Monitor

October 15, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	14 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22623	-0.44	-3.31	1.30	-10.03
BSE Sensex	72782	-0.34	-2.67	1.16	-11.27
BSE 100	24254	-0.22	-3.49	3.62	-7.92
BSE 200	10641	-0.18	-3.63	4.78	-6.63
BSE 500	34483	-0.17	-3.61	7.15	-5.22
BSE SmallCap	57174	0.37	-2.47	32.29	8.61
BSE MidCap	45799	-0.07	-4.67	12.98	-0.29
BSE LargeCap	8944	-0.22	-3.42	3.65	-7.63
Sectoral indices					
BSE IT	28965	1.41	4.10	3.72	-16.09
BSE Oil & Gas	24408	0.86	-4.64	-4.50	-9.72
BSE FMCG	17228	1.14	0.34	2.70	-13.69
BSE Auto	55772	-0.87	-7.64	6.00	-6.18
BSE Bankex	62363	-0.12	-2.60	10.22	-2.13
BSE Teck	15041	0.71	1.96	2.12	-12.41
BSE Capital Goods	75216	0.81	-3.00	17.08	9.82
BSE Consumer Durable	57909	-0.11	-7.10	10.05	-1.07

Turnover (Rs Cr)	14 Oct	13 Oct
BSE Cash	9965	9891
NSE Cash	116560	105779
NSE F&O	11995036	63590869

Rs. Cr (Equity)	FII Inv 13 Oct	MF Inv 9 Oct	DII Inv 14 Oct
Buy	13,687	11,957	17,429
Sell	15,123	7,535	14,758
Net	-1,436	4,421	2,670
Net (MTD)	-37,621	33,807	48,510
Net (YTD)	-304,891	458,697	680,492

	14 Oct	1Day	Month ago	Year ago
USD	95.03	95.25	95.72	88.79
GBP	126.10	125.92	129.45	118.08
Euro	106.53	106.43	111.15	102.80
100 Yen	60.03	60.17	62.14	58.50

Indian markets

- Indian equity benchmarks closed lower on Wednesday, pressured by higher crude oil prices and continued foreign outflows, while investors assessed corporate earnings and awaited key US inflation data.
- The top gainers were Nestle India, Tata Consumer Products, Infosys, Tata Consultancy Services and Coal India, up 2.08-3.69%.
- The top losers were Shriram Finance, HDFC Life Insurance Company, Bajaj Finance, Mahindra & Mahindra and SBI Life Insurance Company, down 2.20-3.85%.

Indian debt

- The interbank call-money rate ended higher at 5.60% on Wednesday compared to 5.40% on Tuesday.
- Government bond prices ended lower on Wednesday pressured by rising crude oil prices and comments from the RBI Governor that reinforced expectations of further policy tightening.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.40% on Wednesday compared to 7.37% on Tuesday.

Indian Rupee

- The spot rupee ended higher against the United States (US) dollar on Wednesday, as measures by the Reserve Bank of India helped curb speculative dollar demand and supported the currency, offsetting pressure from elevated crude oil prices and persistent foreign fund outflows.

Regulatory

- SEBI proposed comprehensive reforms to the SME IPO framework, including the introduction of market capitalization-based eligibility criteria in place of paid-up capital requirements, stricter profitability norms, a reduction in the minimum application size to Rs1 lakh, and changes to allotment and offer-for-sale regulations.
- The Pension Fund Regulatory and Development Authority (PFRDA) plans to expand pension investment options by permitting exposure to private-market assets and simplifying subscriber onboarding through the Unified Payments Interface (UPI), aimed at increasing pension penetration and participation.

Economy and Government

- India's Wholesale Price Index (WPI) inflation accelerated to 11.39% YoY in September 2026 from 9.92% in August, indicating a further increase in wholesale price pressures across the economy.
- Prime Minister Narendra Modi is set to launch development projects worth Rs 3,350 crore in Ladakh, focused on improving connectivity, energy infrastructure, and heritage conservation.
- India and Mauritius amended their tax treaty to incorporate the Principal Purpose Test (PPT), aimed at preventing treaty abuse and tax avoidance.
- Commerce Minister Piyush Goyal said India is working to rebuild economic and trade relations with China, while also emphasizing stronger engagement through multilateral platforms.
- Union Minister of Railways of India Ashwini Vaishnaw said India is emerging as a trusted global supply-chain partner, supported by its focus on technology, manufacturing, and economic resilience.

TATA mutual fund

Domestic Debt Market Indicators

Instrument	14 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.60%	5.40%	5.10%	5.25%	7.00%	5.40%
3-Month T-Bill	5.70%	5.59%	5.18%	5.31%	5.40%	5.43%
6-Month T-Bill	6.25%	6.08%	5.60%	5.45%	5.51%	5.52%
1-year T-Bill	6.42%	6.24%	5.87%	5.63%	5.70%	5.55%
3-Month CD	6.63%	6.50%	6.03%	6.70%	7.35%	5.93%
6-Month CD	7.24%	7.24%	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%	6.49%
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	6.38%	6.18%	5.90%	5.85%	5.82%	5.59%
3-year Gilt	6.89%	6.84%	6.38%	6.26%	6.43%	5.90%
5-year Gilt	7.27%	7.20%	6.75%	6.49%	6.90%	6.13%
1-year AAA	7.91%	7.87%	7.52%	7.49%	7.57%	6.63%
3-year AAA	8.15%	8.10%	7.75%	7.46%	7.59%	6.86%
5-year AAA	8.17%	8.12%	7.79%	7.44%	7.67%	6.90%
10-year G-sec	7.41%	7.36%	7.02%	6.80%	7.02%	6.51%
Net LAF (Rs Cr)	335926	335901	1072702	148792	245161	127618
Forex reserves ($ bn)	734.61	747.56	785.71	674.19	642.49	699.96

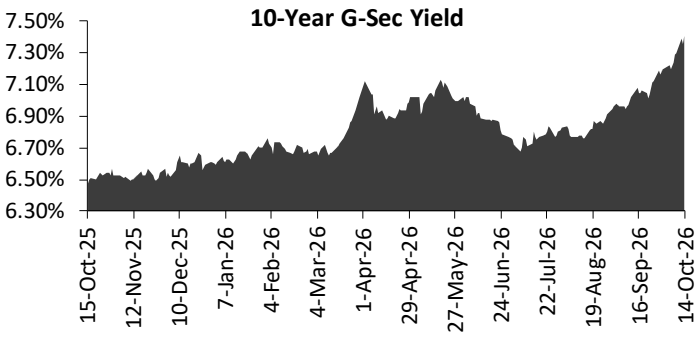
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.25	7.56	8.28	8.36	9.59	10.07
1 Year	6.38	7.91	8.63	8.71	9.94	10.42
3 Year	6.89	8.15	8.87	8.95	10.18	10.66
5 Year	7.27	8.17	8.99	9.07	10.30	10.78
10 Year	7.41	8.18	9.00	9.08	10.31	10.79

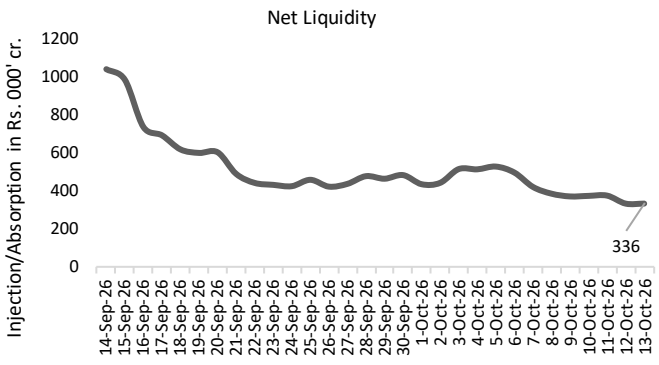
Rs. Cr (Debt)	FII Inv 13 Oct	MF Inv 9 Oct
Buy	77	17,557
Sell	767	12,939
Net	-690	4,618
Net (MTD)	4,428	11,720
Net (YTD)	53,756	-596,556

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

- Jio Platforms plans to file the draft prospectus for its proposed Rs 30,000 crore IPO, which is expected to be among the largest public offerings in India's capital markets history.
- The Cabinet Committee on Economic Affairs (CCEA) approved the sale of a 60.72% stake in IDBI Bank to Fairfax Financial Holdings for Rs 52,878 crore.
- Tata Power announced a Rs 15,000 crore Mumbai grid expansion plan to upgrade transmission infrastructure and support rising electricity demand, particularly from AI-driven data centres.
- Hyundai Motor India plans to invest Rs 11,000 crore in its Pune manufacturing facility through a phased investment programme to expand production capacity and strengthen its manufacturing footprint.
- Nexon Geochem plans to invest Rs 1,250 crore to establish a rare-earth permanent magnet manufacturing facility in Andhra Pradesh, supporting domestic supply chains for critical minerals and advanced manufacturing.





Global market indices	14 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51621.48	-0.09	-1.53	11.39	11.56
Nikkei 225	67744.29	-0.05	6.70	32.67	44.61
FTSE	10724.86	0.70	0.26	5.39	13.46
Hang Seng	24314.17	-0.13	-2.42	-1.91	-4.43
Taiwan	48625.83	0.59	6.19	53.28	81.49

Global debt	14 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.19	5.21	4.97	4.58	4.30	4.03
UK 10-Year (%)	5.42	5.45	5.36	4.97	4.88	4.57
German 10-Year (%)	3.47	3.46	3.53	3.07	3.01	2.61
Japan 10-Year (%)	3.00	3.00	3.00	2.69	2.35	1.66

Domestic	14 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	146064	-1.05	-3.87	-0.46	15.78
Silver (Rs / Kg)	213822	-2.38	-6.60	-7.09	20.06
Aluminium (Rs / Kg)	329	-0.17	-6.09	-7.33	24.90
Copper (Rs / kg)	1429	-1.30	0.45	22.05	42.33
Lead (Rs / kg)	199	0.08	-1.49	0.76	7.67
Zinc (Rs /Kg)	436	0.38	1.59	34.96	47.55
Nickel (Rs / kg)	1533	0.07	-4.97	-6.34	13.47

Global	14 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4153.51	-0.31	-3.95	-8.27	1.00
Silver (oz/$)	5928.00	-1.61	-7.07	-15.88	14.35
Brent ($/bbl)	106.06	0.35	0.36	-10.38	70.00
NYMEX crude ($/bbl)	95.09	1.01	-6.21	-6.20	61.99

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 Wednesday as hotter-than-expected US inflation data heightened concerns over further Federal Reserve rate hikes, while sharp declines in AI and technology-related stocks weighed on investor sentiment.
- 10-year US bond yield ended lower at 5.19% after jumping earlier in the day as traders awaited more inflation data due out Thursday.
- FTSE index closed higher on Wednesday, supported by gains in healthcare and consumer staples stocks, as a weaker pound following hotter-than-expected US inflation data boosted sentiment.
- Asian markets were trading mostly higher at 8.30 AM.
- US annual inflation rate accelerated to 3.7% in September 2026, compared to 3.4% in each of the previous two months while the core inflation rose to 2.6% from 2.4%.
- China outstanding yuan loans increased 4.8% year-on-year in September 2026 compared to 4.9% rise in August 2026.
- Japan Machinery Orders increased to 18.6% in August 2026 compared to11.2% in July 2026.

Commodity

- Crude oil prices rose by 95 cents to $95.09 per barrel on NYMEX as escalating Middle East tensions following attacks on Saudi Aramco facilities and concerns over disruptions to shipping routes heightened supply risk concerns.
- Domestic gold prices ended lower due to weak demand.

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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