Daily Market Monitor

October 16, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	15 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22997	1.66	-0.52	2.98	-9.19
BSE Sensex	74316	2.11	0.42	3.29	-10.04
BSE 100	24600	1.43	-0.72	5.10	-7.40
BSE 200	10755	1.07	-1.06	5.90	-6.44
BSE 500	34738	0.74	-1.23	7.94	-5.33
BSE SmallCap	56349	-1.44	-1.11	30.38	6.21
BSE MidCap	45643	-0.34	-2.87	12.60	-1.68
BSE LargeCap	9052	1.20	-0.82	4.89	-7.29
Sectoral indices					
BSE IT	29402	1.51	3.74	5.28	-15.06
BSE Oil & Gas	24765	1.46	-2.08	-3.11	-9.24
BSE FMCG	17085	-0.82	0.37	1.86	-15.26
BSE Auto	56591	1.47	-4.28	7.56	-5.03
BSE Bankex	62899	0.86	-0.41	11.17	-1.62
BSE Teck	15354	2.09	3.00	4.25	-11.09
BSE Capital Goods	73381	-2.44	-1.23	14.22	6.22
BSE Consumer Durable	57866	-0.07	-4.64	9.97	-2.32

Turnover (Rs Cr)	15 Oct	14 Oct
BSE Cash	10041	9965
NSE Cash	119051	116560
NSE F&O	13595573	11995036

Rs. Cr (Equity)	FII Inv 14 Oct	MF Inv 13 Oct	DII Inv 15 Oct
Buy	17,251	12,444	19,439
Sell	18,353	9,499	16,119
Net	-1,102	2,945	3,319
Net (MTD)	-38,723	38,489	51,829
Net (YTD)	-305,993	463,379	683,812

	15 Oct	1Day	Month ago	Year ago
USD	95.07	95.03	95.93	88.29
GBP	125.87	126.10	129.19	117.99
Euro	106.57	106.53	110.59	102.66
100 Yen	60.19	60.03	61.94	58.45

Indian markets

- Indian equity benchmarks surged on Thursday, supported by gains in information technology, banking and consumer stocks.
- The top gainers were Tech Mahindra, ICICI Bank, Reliance Industries, Bharti Airtel and BSE, up 2.70-4.75%.
- The top losers were Nestle India, Adani Enterprises, Trent, Shriram Finance and Bharat Electronics, down 0.51-7.76%.

Indian debt

- The interbank call-money rate ended higher at 5.75% on Thursday compared to 5.60% on Wednesday.
- Government bond prices ended higher on Thursday as softer US Treasury yields supported sentiment and encouraged buying in government securities, though concerns over tighter domestic liquidity and additional debt supply limited gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.39% on Thursday compared to 7.40% on Wednesday.

Indian Rupee

- The spot rupee ended higher against the United States (US) dollar on Thursday as a weaker greenback, softer crude oil prices and a strong rally in domestic equities boosted sentiment.

Regulatory

- The Reserve Bank of India (RBI) issued clarifications on its recent rupee-support measures following concerns regarding hedging rules and cash margin requirements for certain derivatives.
- SEBI requested IRDAI to consider including insurance-related information in the Consolidated Account Statement (CAS).
- According to Chairman Tuhin Kanta Pandey, SEBI is preparing a fresh round of market reforms covering IPO disclosures, SME listings, corporate bond trading, short-selling rules, and AI applications in financial markets to simplify compliance, deepen markets, and strengthen investor protection.
- The EPFO extended the September PF return filing deadline to October 31 following the increase in the provident fund wage ceiling from Rs 15,000 to Rs 25,000.

Economy and Government

- India's merchandise trade deficit widened to $30.21 billion in September 2026 from $26.86 billion in August, as imports rose to $74.61 billion while exports increased to $44.40 billion.
- Merchandise exports grew 23.0% YoY to $44.4 billion in September, while imports rose 8.0% to $74.61 billion, according to provisional data released by the Ministry of Commerce & Industry.
- India unemployment rate was unchanged at 5.0% in September 2026 compared to previous month.
- Ministry of Defence signed contracts worth approximately Rs 4,106 crore for the acquisition of the GSAT-7C communication satellite capability and Varunastra heavyweight torpedoes.
- Prime Minister Narendra Modi virtually inaugurated and dedicated projects worth Rs 3,350 crore in Ladakh across roads, aviation, and renewable energy sectors.
- Central Railway has sought forest clearance for a Rs 1,620 crore fourth railway line between Kalyan and Asangaon in Maharashtra, aimed at enhancing rail capacity and improving commuter and freight movement on the busy corridor.

Domestic Debt Market Indicators

Instrument	15 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.60%	5.20%	5.35%	7.00%	5.00%
3-Month T-Bill	5.74%	5.70%	5.30%	5.32%	5.40%	5.44%
6-Month T-Bill	6.34%	6.25%	5.65%	5.53%	5.51%	5.51%
1-year T-Bill	6.47%	6.42%	5.86%	5.66%	5.70%	5.53%
3-Month CD	6.80%	6.63%	6.14%	6.83%	7.35%	5.93%
6-Month CD	7.40%	7.24%	6.75%	7.12%	7.30%	6.18%
1-year CD	7.65%	7.60%	7.30%	7.35%	7.25%	6.39%
3-Month CP	7.30%	7.10%	6.85%	7.25%	7.75%	6.49%
6-Month CP	7.80%	7.70%	7.15%	7.50%	7.65%	6.75%
1-year CP	8.05%	8.00%	7.70%	7.80%	7.60%	6.94%
1-year Gilt	6.59%	6.38%	6.00%	5.79%	5.82%	5.59%
3-year Gilt	6.89%	6.89%	6.50%	6.19%	6.43%	5.86%
5-year Gilt	7.30%	7.27%	6.86%	6.46%	6.90%	6.11%
1-year AAA	7.97%	7.91%	7.62%	7.50%	7.57%	6.63%
3-year AAA	8.16%	8.15%	7.83%	7.46%	7.59%	6.84%
5-year AAA	8.20%	8.17%	7.86%	7.44%	7.67%	6.88%
10-year G-sec	7.39%	7.41%	7.08%	6.77%	7.02%	6.48%
Net LAF (Rs Cr)	256516	335926	985238	130684	245161	130191
Forex reserves ($ bn)	734.61	747.56	785.71	674.19	642.49	699.96

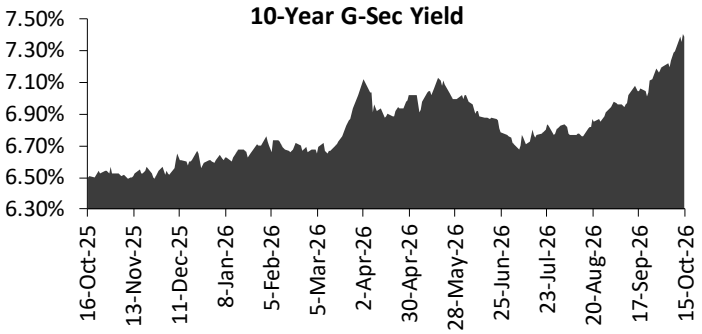
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.34	7.72	8.44	8.52	9.75	10.23
1 Year	6.59	7.97	8.69	8.77	10.00	10.48
3 Year	6.89	8.16	8.88	8.96	10.19	10.67
5 Year	7.30	8.20	9.02	9.10	10.33	10.81
10 Year	7.39	8.15	8.97	9.05	10.28	10.76

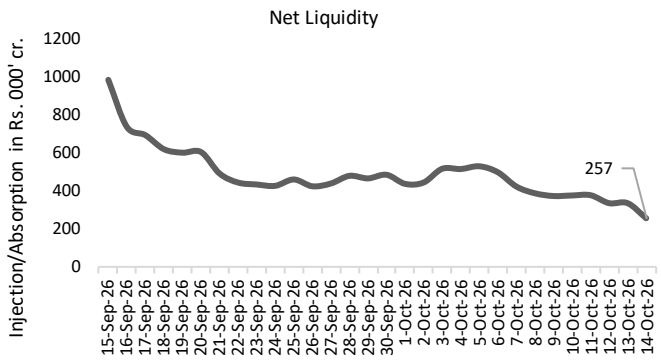
Rs. Cr (Debt)	FII Inv 14 Oct	MF Inv 13 Oct
Buy	99	13,528
Sell	481	13,891
Net	-381	-363
Net (MTD)	4,046	7,670
Net (YTD)	53,375	-600,606

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	5.54% (Sep'26)	4.38% (Jun'26)	1.44% (Sep'25)
WPI	11.39% (Sep'26)	9.97% (Jun'26)	-0.20% (Sep'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

- Jindal Ferrous Limited (JFL) commissioned its first integrated carbon steel manufacturing facility in Odisha with an investment of Rs 5,000 crore.
- Stellantis announced plans to invest approximately Rs 4,000 crore in India over the next three years.
- TREVOC plans to invest Rs 800-1,000 crore over the next three years to expand its real estate footprint into tier-2 cities, including Sonipat and Panipat.
- CapitaLand inaugurated its Chennai data centre facility, reinforcing Tamil Nadu's push into digital infrastructure, semiconductors and advanced manufacturing to attract long-term technology investments.
- Palo Alto Networks raised approximately $147.3 million through a share-linked prepaid forward transaction tied to 500,000 shares, enabling a structured monetisation of a portion of equity holdings without an immediate sale of the underlying shares.
- Formial Labs raised Rs 2.88 crore in a funding round led by Zeropearl VC to support its growth and business expansion.





TATA mutual fund

Global market indices	15 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52177.69	1.08	0.16	12.59	12.81
Nikkei 225	64425.95	-4.90	1.48	26.17	35.14
FTSE	10840.35	1.08	1.71	6.52	15.02
Hang Seng	24062.72	-1.03	-2.45	-2.93	-7.13
Taiwan	46969.87	-3.41	3.20	48.06	72.20

Global debt	15 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.10	5.19	5.00	4.55	4.30	4.05
UK 10-Year (%)	5.37	5.42	5.38	4.94	4.88	4.55
German 10-Year (%)	3.41	3.47	3.53	3.09	3.01	2.56
Japan 10-Year (%)	2.90	3.00	3.04	2.68	2.35	1.65

Domestic	15 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	145942	-0.08	-3.29	-0.54	15.17
Silver (Rs / Kg)	208275	-2.59	-8.95	-9.50	19.70
Aluminium (Rs / Kg)	323	-1.94	-7.87	-9.13	22.31
Copper (Rs / kg)	1419	-0.70	3.01	21.19	42.48
Lead (Rs / kg)	198	-0.38	0.15	0.38	6.34
Zinc (Rs /Kg)	437	0.38	3.05	35.47	48.74
Nickel (Rs / kg)	1513	-1.32	-5.65	-7.58	11.68

Global	15 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4086.93	-1.60	-5.22	-9.74	-1.45
Silver (oz/$)	5577.00	-5.92	-12.38	-20.86	7.44
Brent ($/bbl)	105.92	-0.13	-2.60	-10.50	71.09
NYMEX crude ($/bbl)	97.97	3.03	-7.43	-3.36	68.13

Upcoming market indicators

Date	Indicator	Previous
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
Oct 23	India HSBC Manufacturing PMI Flash, Oct	55.1

Global markets

- Wall Street stocks ended higher on Thursday buoyed by gains in healthcare and consumer stocks.
- 10-year US bond yield ended lower at 5.10% following the latest wholesale inflation data.
- FTSE index ended higher on Thursday after the finance minister reaffirmed the government's commitment to fiscal discipline.
- Asian markets were trading mostly higher at 8.30 AM.
- US initial jobless claims increased by 1,000 to 199,000 in the week ending October 10, 2026.
- US producer prices increased to 159.78 points in September from 157.41 points in August.
- US retail sales grew 6.3% year-over-year in September 2026, following a 5.6% increase in August.
- Eurozone Industrial production fell 1.1% in August 2026, compared to a 0.3% drop in July 2026.
- UK construction output fell 1.8% in August 2026, compared to a 1.9% decline in the prior month.
- The UK GDP grew 2.1% year-on-year in August 2026, compared to 1.8% rise in July 2026.

Commodity

- Crude oil prices rose by $2.88 to $97.97 per barrels on NYMEX driven by investor expectations that the U.S. could relax restrictions on the world's "shadow fleet" of tankers.
- Domestic gold prices ended flat as gains due weakness in dollar were capped 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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behaviour of investors