Daily Market Monitor

October 19, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	16 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23146	0.65	-0.31	3.65	-9.53
BSE Sensex	74729	0.56	0.53	3.87	-10.47
BSE 100	24703	0.42	-0.77	5.54	-7.87
BSE 200	10795	0.37	-1.06	6.29	-6.89
BSE 500	34846	0.31	-1.22	8.28	-5.78
BSE SmallCap	56496	0.26	-0.83	30.72	5.99
BSE MidCap	45549	-0.21	-3.08	12.36	-2.17
BSE LargeCap	9094	0.46	-0.76	5.38	-7.72
Sectoral indices					
BSE IT	30396	3.38	8.79	8.84	-12.48
BSE Oil & Gas	24669	-0.39	-3.20	-3.49	-9.96
BSE FMCG	17010	-0.44	-1.49	1.41	-17.07
BSE Auto	57027	0.77	-4.07	8.39	-5.38
BSE Bankex	62769	-0.21	-1.38	10.94	-3.06
BSE Teck	15858	3.28	6.44	7.68	-8.35
BSE Capital Goods	73532	0.21	-0.94	14.46	6.20
BSE Consumer Durable	57505	-0.62	-5.63	9.29	-4.37

Turnover (Rs Cr)	16 Oct	15 Oct
BSE Cash	9292	10041
NSE Cash	122601	119051
NSE F&O	25452299	13595573

Rs. Cr (Equity)	FII Inv 15 Oct	MF Inv 13 Oct	DII Inv 16 Oct
Buy	13,807	12,444	17,202
Sell	17,952	9,499	20,863
Net	-4,146	2,945	-3,661
Net (MTD)	-42,869	38,489	48,168
Net (YTD)	-310,139	463,379	680,151

	16 Oct	1Day	Month ago	Year ago
USD	95.02	95.07	95.94	87.90
GBP	126.41	125.87	129.32	117.88
Euro	106.70	106.57	110.79	102.46
100 Yen	60.18	60.19	61.86	58.12

Indian markets

- Indian equity benchmarks closed higher on Friday, led by a sharp rally in IT stocks after strong quarterly earnings for Q2FY27. Improved global risk sentiment, softer US Treasury yields, and supportive domestic currency further aided gains.
- The top gainers were, Tech Mahindra, Tata Consultancy Services, Infosys, Bharti Airtel, and HCL Technologies, up 2.37-8.48%.
- The top losers were, InterGlobe Aviation, BSE, Max Healthcare Institute, Tata Consumer Products, and Jio Financial Services down 1.26-1.91%.

Indian debt

- The interbank call-money rate ended lower at 5.74% on Friday compared to 5.75% on Thursday.
- Government bond prices ended higher on Friday, supported by positive cues from global bond markets. However, gains were capped as investors remained cautious amid persistent domestic inflationary pressures and concerns over further policy rate hikes.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.38% on Friday compared to 7.39% on Thursday.

Indian Rupee

- The spot rupee ended higher against the United States dollar on Friday, supported by continued RBI intervention measures and expectations of further monetary tightening.

Regulatory

- SEBI revised its Closing Auction Session framework, introducing a 10-minute closing auction and restoring the VWAP-based method for F&O expiry settlement prices from December 2026.
- Indian Gas Exchange (IGX) received approval from the Petroleum and Natural Gas Regulatory Board (PNGRB) to introduce a regasification capacity booking platform on the exchange.

Economy and Government

- India's foreign exchange reserves declined by $8.58 billion during the week ended October 9, taking total reserves to $726.03 billion.
- India's banking sector remained strong, with bank credit growth reaching 19.4% year-on-year in October 2026, while deposit growth increased to 17.8%.
- India and Canada signed multiple commercial agreements and advanced negotiations on a proposed Comprehensive Economic Partnership Agreement targeted for completion by end-2026.
- Finance Minister Nirmala Sitharaman said China's non-tariff barriers continue to restrict market access for Indian exports, highlighting a key obstacle to reducing India's widening trade deficit and deepening bilateral economic ties.
- Mizoram Chief Minister Lalduhoma launched four digital financial management initiatives, including MIWAS, e-Sanction, e-Budget and 100% DBT, to improve transparency, efficiency and direct fund transfers.
- The Ministry of Coal proposed a new compliance framework that would allow authorities to suspend coal and lignite mining operations for violations of approved mining plans, while requiring annual board-level compliance declarations.
- The Uttar Pradesh government plans to acquire 1,000 acres of land in Bundelkhand to establish a data centre and IT hub aimed at promoting technology-driven development.

TATA mutual fund

Domestic Debt Market Indicators

Instrument	16 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.74%	5.75%	5.10%	5.50%	7.00%	5.35%
3-Month T-Bill	5.81%	5.74%	5.29%	5.31%	5.40%	5.44%
6-Month T-Bill	6.38%	6.34%	5.74%	5.52%	5.51%	5.53%
1-year T-Bill	6.51%	6.47%	6.00%	5.67%	5.70%	5.52%
3-Month CD	7.00%	6.80%	6.15%	6.80%	7.35%	5.97%
6-Month CD	7.48%	7.40%	6.75%	7.05%	7.30%	6.18%
1-year CD	7.65%	7.65%	7.30%	7.30%	7.25%	6.40%
3-Month CP	7.45%	7.30%	6.90%	7.35%	7.75%	6.58%
6-Month CP	7.85%	7.80%	7.10%	7.50%	7.65%	6.75%
1-year CP	8.05%	8.05%	7.70%	7.80%	7.60%	6.94%
1-year Gilt	6.60%	6.59%	6.03%	5.75%	5.82%	5.59%
3-year Gilt	6.88%	6.89%	6.57%	6.17%	6.43%	5.87%
5-year Gilt	7.27%	7.30%	6.85%	6.43%	6.90%	6.14%
1-year AAA	7.98%	7.97%	7.62%	7.47%	7.57%	6.63%
3-year AAA	8.19%	8.16%	7.83%	7.44%	7.59%	6.84%
5-year AAA	8.21%	8.20%	7.86%	7.44%	7.67%	6.88%
10-year G-sec	7.37%	7.39%	7.05%	6.75%	7.02%	6.50%
Net LAF (Rs Cr)	242482	256516	737513	83196	245161	141133
Forex reserves ($ bn)	726.03	734.61	785.71	674.19	642.49	699.96

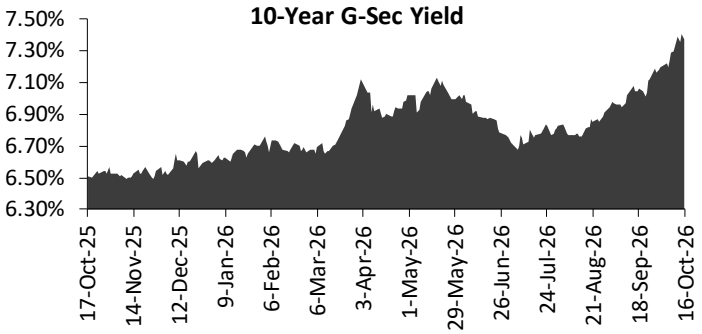
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.38	7.80	8.52	8.60	9.83	10.31
1 Year	6.60	7.98	8.70	8.78	10.01	10.49
3 Year	6.88	8.19	8.91	8.99	10.22	10.70
5 Year	7.27	8.21	9.03	9.11	10.34	10.82
10 Year	7.37	8.15	8.97	9.05	10.28	10.76

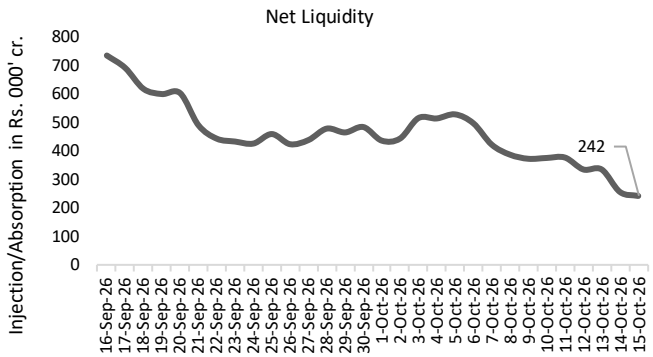
Rs. Cr (Debt)	FII Inv 15 Oct	MF Inv 13 Oct
Buy	438	13,528
Sell	429	13,891
Net	9	-363
Net (MTD)	4,056	7,670
Net (YTD)	53,384	-600,606

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

- Krisumi Corporation has begun construction of Phases 5 and 6 of its Krisumi City township in Gurugram, investing over Rs 1,300 crore in a 542-unit luxury residential project.
- Jindal Steel commissioned a 12.5-million-tonne cargo terminal at Paradip, Odisha, as part of its broader Rs 3,400 crore investment project.
- Urban Company's board approved a proposal to raise Rs 2,500 crore through a Qualified Institutional Placement (QIP).
- Tata Motors' proposed acquisition of Iveco Group received shareholder approval, with investors approving all related resolutions.
- RapidCanvas raised $29 million in a funding round led by Vertex Ventures Southeast Asia and India, with participation from Hitachi Ventures and existing investors, taking total funding to $52.5 million and supporting expansion of its AI agent platform.
- State Bank of India increased its home loan rates by 25 basis points through higher EBLR and RLLR benchmarks, raising borrowing costs for repo-linked home loan customers.





Global market indices	16 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52002.41	-0.34	1.05	12.22	13.17
Nikkei 225	65324.29	1.39	2.19	27.93	35.31
FTSE	10881.9	0.38	1.81	6.93	15.32
Hang Seng	24186.83	0.52	-2.13	-2.43	-6.57
Taiwan	47111.26	0.30	2.75	48.51	70.40

Global debt	16 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.09	5.10	5.01	4.57	4.30	3.99
UK 10-Year (%)	5.40	5.37	5.30	4.97	4.88	4.48
German 10-Year (%)	3.41	3.41	3.51	3.14	3.01	2.57
Japan 10-Year (%)	2.94	2.90	3.00	2.72	2.35	1.65

Domestic	16 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	146426	0.33	-3.90	-0.21	14.87
Silver (Rs / Kg)	210918	1.27	-8.83	-8.35	25.48
Aluminium (Rs / Kg)	328	1.58	-6.90	-7.70	24.64
Copper (Rs / kg)	1422	0.21	3.38	21.45	43.27
Lead (Rs / kg)	200	0.96	0.91	1.34	8.09
Zinc (Rs /Kg)	438	0.16	1.12	35.69	49.23
Nickel (Rs / kg)	1502	-0.69	-6.24	-8.22	11.27

Global	16 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4148.94	1.52	-3.35	-8.37	-0.95
Silver (oz/$)	5700.00	2.21	-10.01	-19.11	8.78
Brent ($/bbl)	109.86	3.72	3.81	-7.17	79.92
NYMEX crude ($/bbl)	101.41	3.51	-1.00	0.03	76.49

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 lower on Friday led by selloff in technology stocks.
- 10-year US bond yield ended lower at 5.09% as investors continued to cash in technology shares and fled to the safety of bonds following the latest wholesale inflation data.
- FTSE index ended higher on Friday supported by gains in defensive stocks while finance minister John Healey's reassurances on fiscal discipline also added the rally.
- Asian markets were trading mostly mixed at 8.30 AM.
- US industrial production increased 2.2% year-on-year in September 2026, following an upwardly revised 1.6% gain in August.
- US manufacturing production increased 1.1% year-on-year in September 2026, following a 0.9% rise in August.
- US import prices rose 8.1% year-on-year in September, while export prices increased 11.6%, marking the strongest gains since July 2022.
- US New York Fed Services Activity Index fell to -20.7 in October 2026 from -8.7 in September, indicating a sharper contraction in service-sector activity.
- Eurozone recorded a €16.1 billion trade deficit in August 2026, compared with a €502 million surplus in the corresponding period a year earlier.
- Eurozone inflation accelerated to 3.8% in September 2026, the highest level since September 2023, while core inflation rose to 2.5% from 2.4% in August.
- Eurozone Consumer Price Index (CPI) increased to 104.31 from 103.69 in the previous month.

Commodity

- Crude oil prices rose by $3.44 to $101.41 per barrel on worries that escalating tensions in the Middle East could further tighten supplies.
- Domestic gold prices ended higher due to strong 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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