Daily Market Monitor

October 27, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	26 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22753	0.68	-1.67	1.89	-11.79
BSE Sensex	73607	0.66	-0.39	2.31	-12.59
BSE 100	24203	0.68	-2.38	3.40	-10.34
BSE 200	10529	0.79	-3.44	3.67	-9.67
BSE 500	33822	0.85	-4.33	5.10	-9.01
BSE SmallCap	52798	0.78	-9.53	22.17	-1.34
BSE MidCap	43501	0.92	-7.57	7.31	-6.64
BSE LargeCap	8888	0.80	-3.03	3.00	-10.37
Sectoral indices					
BSE IT	30512	0.81	12.41	9.26	-13.47
BSE Oil & Gas	24645	1.59	-3.39	-3.58	-10.62
BSE FMCG	16173	0.32	-6.92	-3.59	-21.76
BSE Auto	54953	0.23	-7.87	4.45	-9.03
BSE Bankex	61144	0.09	-2.69	8.07	-6.06
BSE Teck	15969	1.05	11.28	8.43	-9.62
BSE Capital Goods	68906	1.35	-9.28	7.26	-0.60
BSE Consumer Durable	54909	0.16	-10.06	4.35	-9.66

Turnover (Rs Cr)	26 Oct	23 Oct
BSE Cash	8656	10518
NSE Cash	103411	123124
NSE F&O	31833215	24444599

Rs. Cr (Equity)	FII Inv 23 Oct	MF Inv 23 Oct	DII Inv 26 Oct
Buy	15,340	15,209	15,778
Sell	13,069	12,406	13,249
Net	2,272	2,802	2,530
Net (MTD)	-36,553	43,787	61,640
Net (YTD)	-303,824	468,678	693,622

	26 Oct	1Day	Month ago	Year ago
USD	95.15	94.94	95.89	87.71
GBP	127.23	127.13	126.83	116.85
Euro	106.72	106.45	109.16	101.79
100 Yen	60.57	60.49	60.65	57.33

Indian markets

- Indian equity benchmarks ended higher on Monday, supported by post-earnings gains in heavyweight stocks. However, rising crude oil prices and caution ahead of the Federal Reserve's policy outcome limited the market's upside.
- The top gainers were Dr. Reddy's Laboratories, JSW Steel, BSE, Adani Ports and Special Economic Zone and Eternal—up 2.57-6.62%.
- The top losers were Shriram Finance, Tata Consumer Products, Bajaj Finance, HDFC Life Insurance Company and HDFC Bank—down 0.69-4.62%.

Indian debt

- The interbank call-money rate ended lower at 5.75% on Monday compared to 5.85% on Friday.
- Government bond prices ended marginally lower on Monday, as elevated crude oil prices and a weaker rupee weighed on sentiment, pushing benchmark bond yields slightly higher.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.48% on Monday compared to 7.47% on Friday.

Indian Rupee

- The spot rupee fell against the United States dollar on Monday as strong demand for dollars from importers and elevated Brent crude prices weighed on sentiment. Investors are awaiting the US Federal Reserve's policy decision, which is due later this week.

Economy and Government

- Finance Minister Nirmala Sitharaman reaffirmed the government's fiscal consolidation roadmap, targeting a reduction in public debt to 50% of GDP by 2030, while continuing efforts to manage inflation and support currency stability.
- The Ministry of Defence approved defence procurement proposals worth Rs 2.12 lakh crore to strengthen India's military capabilities and indigenous defence manufacturing.
- Bundelkhand in Uttar Pradesh attracted investment proposals exceeding Rs 80,000 crore across sectors including energy, data centres, infrastructure, and tourism.
- The Ministry of Road Transport and Highways (MoRTH) notified amendments permitting flex-fuel vehicles capable of operating on fuel blends of up to E100 ethanol, supporting the adoption of cleaner fuels and reducing dependence on conventional fuels.
- Commerce Minister Piyush Goyal said India and the United States are in the final stages of fine-tuning their proposed trade agreement, with most discussions concluded and only a few issues remaining to be resolved.
- The Central Board of Direct Taxes (CBDT) received around 1,100 applications under the foreign assets disclosure scheme, reflecting taxpayer participation in the initiative to declare overseas assets and income.
- The Maharashtra Government waived 25% of the land transfer fee for green energy projects, providing a boost to renewable energy investments in the state.
- Finance Minister Nirmala Sitharaman said the Reserve Bank of India (RBI) does not determine the value of the rupee, but intervenes to manage excessive volatility and ensure orderly movements in the foreign exchange market.

Domestic Debt Market Indicators

Instrument	26 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.85%	5.20%	5.12%	7.00%	5.72%
3-Month T-Bill	5.86%	5.88%	5.46%	5.32%	5.40%	5.45%
6-Month T-Bill	6.25%	6.31%	5.85%	5.57%	5.51%	5.57%
1-year T-Bill	6.43%	6.46%	6.08%	5.73%	5.70%	5.54%
3-Month CD	7.50%	7.50%	6.30%	6.82%	7.35%	6.05%
6-Month CD	7.90%	7.90%	6.81%	6.94%	7.30%	6.24%
1-year CD	8.10%	8.10%	7.45%	7.25%	7.25%	6.43%
3-Month CP	7.95%	7.95%	7.00%	7.38%	7.75%	6.53%
6-Month CP	8.30%	8.30%	7.25%	7.45%	7.65%	6.79%
1-year CP	8.50%	8.50%	7.95%	7.80%	7.60%	6.94%
1-year Gilt	6.61%	6.60%	6.04%	5.77%	5.82%	5.59%
3-year Gilt	7.00%	7.00%	6.62%	6.22%	6.43%	5.87%
5-year Gilt	7.41%	7.39%	6.99%	6.49%	6.90%	6.15%
1-year AAA	8.32%	8.32%	7.74%	7.52%	7.57%	6.67%
3-year AAA	8.36%	8.34%	7.92%	7.48%	7.59%	6.86%
5-year AAA	8.35%	8.34%	7.95%	7.49%	7.67%	6.90%
10-year G-sec	7.48%	7.48%	7.12%	6.83%	7.02%	6.53%
Net LAF (Rs Cr)	39083	38896	460705	93331	245161	31065
Forex reserves ($ bn)	721.02	726.03	765.90	676.24	642.49	702.28

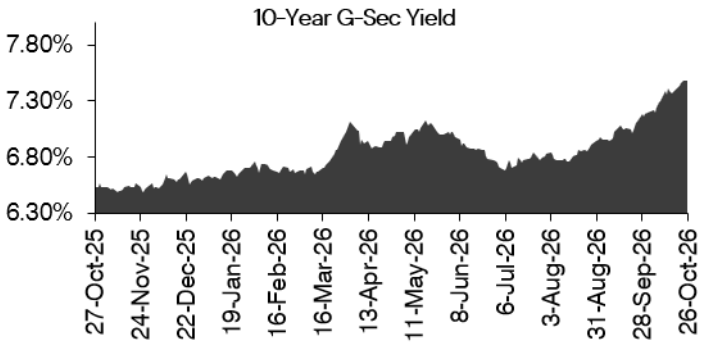
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.25	8.25	8.97	9.05	10.28	10.76
1 Year	6.61	8.32	9.04	9.12	10.35	10.83
3 Year	7.00	8.36	9.08	9.16	10.39	10.87
5 Year	7.41	8.35	9.17	9.25	10.48	10.96
10 Year	7.48	8.28	9.10	9.18	10.41	10.89

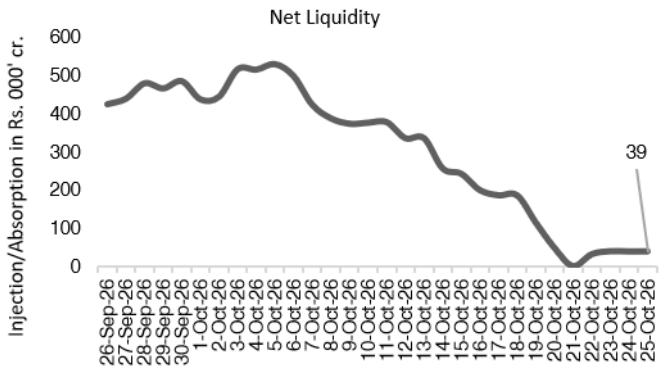
Rs. Cr (Debt)	FII Inv 23 Oct	MF Inv 23 Oct
Buy	769	20,320
Sell	161	29,940
Net	608	-9,620
Net (MTD)	5,014	-41,734
Net (YTD)	54,342	-650,010

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*	-1.83% (Oct 15, 2026)		2.80% (Sep 30, 2026)
Bank Deposit Growth*	-1.10% (Oct 15, 2026)		2.98% (Sep 30, 2026)

Capital markets

- JioBlackRock Mutual Fund filed draft documents with SEBI for life-cycle and debt mutual fund schemes, expanding its domestic product portfolio.
- Matiks raised $10 million in funding in a round led by General Catalyst to support product development and business expansion.
- Tata Communications plans to invest $400-450 million over the next three to five years to build a 10,000-km fibre network connecting key data centre and AI hubs across India.
- Jyoti Structures secured Rs 949 crore worth of transmission line orders from Power Grid Corporation of India, significantly strengthening its order book and revenue visibility.
- Raymond Realty secured Rs 210 crore from the ICICI Prudential Real Estate Development Fund.





Global market indices	26 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52361.58	0.28	1.03	12.99	10.92
Nikkei 225	62189.65	-0.80	-6.29	21.79	26.15
FTSE	10767.33	0.72	0.67	5.81	11.63
Hang Seng	23211.81	0.51	-5.30	-6.36	-11.27
Taiwan	Closed	NA	NA	NA	NA

Global debt	26 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.00	5.00	5.17	4.69	4.30	4.02
UK 10-Year (%)	5.35	5.37	5.36	5.04	4.88	4.43
German 10-Year (%)	3.36	3.34	3.62	3.17	3.01	2.62
Japan 10-Year (%)	2.81	2.80	3.08	2.82	2.35	1.66

Domestic	26 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141710	0.06	-6.84	-3.42	16.62
Silver (Rs / Kg)	194479	0.03	-16.30	-15.49	32.27
Aluminium (Rs / Kg)	330	1.15	-5.78	-7.12	23.68
Copper (Rs / kg)	1400	0.90	-1.58	19.57	40.36
Lead (Rs / kg)	200	1.73	2.04	1.45	9.38
Zinc (Rs /Kg)	439	0.72	-1.49	36.04	44.55
Nickel (Rs / kg)	1532	-0.75	-3.85	-6.41	13.11

Global	26 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3998.59	-1.14	-6.23	-11.69	-3.17
Silver (oz/$)	5409.00	-1.55	-14.87	-23.24	10.48
Brent ($/bbl)	115.81	-0.78	11.01	-2.15	75.63
NYMEX crude ($/bbl)	101.76	-1.46	10.12	0.37	65.46

Upcoming market indicators

Date	Indicator	Previous
Oct 27	China Industrial Profits (YTD), Sep	15.7%
Oct 28	India Industrial Production, Sep	8%
Oct 29	Eurozone Economic Sentiment, Oct	97.9
Oct 30	Japan Industrial Production YoY Prel, Sep	2.7%
Nov 2	India HSBC Manufacturing PMI Final OCT	55.1

Global markets

- Wall Street stocks closed higher on Monday as renewed optimism around AI-related stocks boosted sentiment in the technology sector and supported broader market gains.
- 10-year US bond yield ended flat at 5% as investors remained on sidelines ahead of Fed policy meet outcome.
- FTSE index closed higher on Monday supported by improved sentiment toward AI-related stocks, while investors awaited the UK budget and the U.S. Federal Reserve's policy decision.
- Asian markets were trading mostly higher at 8.30 AM.
- US Chicago Fed National Activity Index improved to 0.07 in September 2026, from -0.08 in August.
- US Dallas Fed Manufacturing Index rose to 13.4 in October 2026 from 9.8 in September.
- China's industrial profits rose 15.5% year-on-year in the first nine months of 2026, compared to a 15.7% increase in the January-August period.
- Japan's coincident economic index eased to 118.8 in August 2026 compared to 120.6 in July 2026 while the leading economic index rose to 118.0 from 117.6.

Commodity

- Crude oil prices fell by $1.51 to $101.76 per barrel on NYMEX as hopes for a potential peace agreement eased concerns over supply disruptions, although attacks on Saudi Arabia limited further declines by keeping geopolitical risks elevated.
- Domestic gold prices ended flat as gains due to safe haven buying were offset by 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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