Daily Market Monitor

October 28, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	27 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22750	-0.02	-1.69	1.87	-12.39
BSE Sensex	73599	-0.01	-0.40	2.29	-13.19
BSE 100	24236	0.14	-2.24	3.55	-10.82
BSE 200	10570	0.38	-3.07	4.07	-9.93
BSE 500	34025	0.60	-3.76	5.73	-9.08
BSE SmallCap	53868	2.03	-7.69	24.64	0.15
BSE MidCap	43944	1.02	-6.63	8.40	-6.36
BSE LargeCap	9916	11.56	8.19	14.91	-0.64
Sectoral indices					
BSE IT	30445	-0.22	12.16	9.02	-13.89
BSE Oil & Gas	24779	0.54	-2.87	-3.05	-11.47
BSE FMCG	16285	0.69	-6.28	-2.92	-21.38
BSE Auto	55843	1.62	-6.38	6.14	-8.07
BSE Bankex	60713	-0.70	-3.37	7.30	-7.33
BSE Teck	16112	0.90	12.28	9.40	-9.60
BSE Capital Goods	69907	1.45	-7.97	8.82	0.70
BSE Consumer Durable	55009	0.18	-9.90	4.54	-9.81

Turnover (Rs Cr)	27 Oct	26 Oct
BSE Cash	9494	8656
NSE Cash	119872	103411
NSE F&O	68332428	31833215

Rs. Cr (Equity)	FII Inv 26 Oct	MF Inv 23 Oct	DII Inv 27 Oct
Buy	10,094	15,209	15,703
Sell	11,057	12,406	16,953
Net	-964	2,802	-1,250
Net (MTD)	-37,517	43,787	60,390
Net (YTD)	-304,787	468,678	692,372

	27 Oct	1Day	Month ago	Year ago
USD	95.16	95.15	95.89	88.06
GBP	126.87	127.23	126.83	117.39
Euro	106.27	106.72	109.16	102.42
100 Yen	60.33	60.57	60.65	57.58

Indian markets

- Indian equity benchmarks ended flat on Tuesday, as gains in banking stocks offset pressure from elevated crude oil prices, while investors remained cautious ahead of the US Federal Reserve's policy decision.
- The top gainers were Tata Consumer Products, Bharti Airtel, Bajaj Auto, BSE and Trent, up 2.42-6.78%.
- The top losers were Asian Paints, Coal India, Grasim Industries, State Bank of India and Tata Consultancy Services, down 1.50-1.94%.

Indian debt

- The interbank call-money rate ended lower at 5.74% on Tuesday compared to 5.75% on Monday.
- Government bond prices ended higher on Tuesday, supported by value buying, ahead of key global central bank policy decisions.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.44% on Tuesday compared to 7.48% on Monday.

Indian Rupee

- The spot rupee ended flat against the United States (US) dollar on Tuesday, as likely support from the Reserve Bank of India offset pressure from foreign fund outflows.

Regulatory

- The Reserve Bank of India (RBI) has proposed a Rs 50 lakh sub-limit under the Liberalised Remittance Scheme (LRS) for overseas travel-related spending, including business travel and pilgrimages, as part of measures aimed at moderating dollar outflows and supporting external sector stability.
- SEBI extended the deadline for debenture trustees to comply with revised regulatory requirements until April 1, 2027, providing additional time to implement the necessary systems, processes, and governance frameworks under the updated norms.
- Pension Fund Regulatory and Development Authority (PFRDA) Chairman said integrating the National Pension System (NPS) into payroll systems alongside provident fund contributions should be simple and seamless for employers.

Economy and Government

- Prime Minister Narendra Modi said India is transitioning from adopting global technologies to creating them, urging innovators to lead in developing solutions for future global challenges.
- Commerce Minister Piyush Goyal said negotiations on India's proposed free trade agreement with Chile are nearing conclusion, while discussions with Canada are progressing, potentially boosting trade, exports, and investment flows.
- Petroleum Minister Hardeep Singh Puri said India is well-positioned to become a major global refining hub as refining capacity in several countries declines.
- Hardeep Singh Puri also said the government has no plans to increase ethanol blending beyond 20%, providing policy clarity for the fuel and biofuels sectors.
- Commerce Minister Piyush Goyal said India is poised to emerge as a major exporter to China and the ASEAN region in the coming years.
- The Uttarakhand Government presented a supplementary budget of Rs 7,844 crore, aimed at funding additional expenditure and development initiatives during the fiscal year.

TATA mutual fund

Domestic Debt Market Indicators

Instrument	27 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.74%	5.75%	5.20%	5.28%	7.00%	4.95%
3-Month T-Bill	5.86%	5.86%	5.46%	5.31%	5.40%	5.48%
6-Month T-Bill	6.26%	6.25%	5.85%	5.55%	5.51%	5.56%
1-year T-Bill	6.44%	6.43%	6.08%	5.68%	5.70%	5.53%
3-Month CD	7.50%	7.50%	6.30%	6.79%	7.35%	6.00%
6-Month CD	7.90%	7.90%	6.81%	6.90%	7.30%	6.24%
1-year CD	8.05%	8.10%	7.45%	7.20%	7.25%	6.42%
3-Month CP	7.98%	7.95%	7.00%	7.30%	7.75%	6.60%
6-Month CP	8.30%	8.30%	7.25%	7.40%	7.65%	6.79%
1-year CP	8.50%	8.50%	7.95%	7.70%	7.60%	6.94%
1-year Gilt	6.64%	6.61%	6.04%	5.75%	5.82%	5.59%
3-year Gilt	7.00%	7.00%	6.62%	6.18%	6.43%	5.89%
5-year Gilt	7.38%	7.41%	6.99%	6.42%	6.90%	6.17%
1-year AAA	8.34%	8.32%	7.74%	7.42%	7.57%	6.67%
3-year AAA	8.37%	8.36%	7.92%	7.45%	7.59%	6.86%
5-year AAA	8.37%	8.35%	7.95%	7.46%	7.67%	6.90%
10-year G-sec	7.45%	7.48%	7.12%	6.77%	7.02%	6.54%
Net LAF (Rs Cr)	34082	39083	460705	100247	245161	-20862
Forex reserves ($ bn)	721.02	726.03	765.90	676.24	642.49	702.28

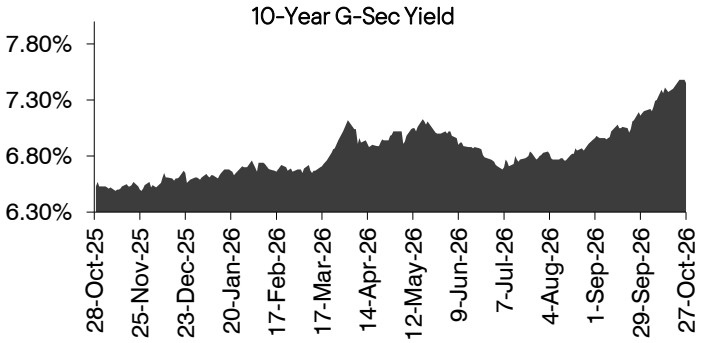
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.26	8.25	8.97	9.05	10.28	10.76
1 Year	6.64	8.34	9.06	9.14	10.37	10.85
3 Year	7.00	8.37	9.09	9.17	10.40	10.88
5 Year	7.38	8.37	9.19	9.27	10.50	10.98
10 Year	7.45	8.32	9.14	9.22	10.45	10.93

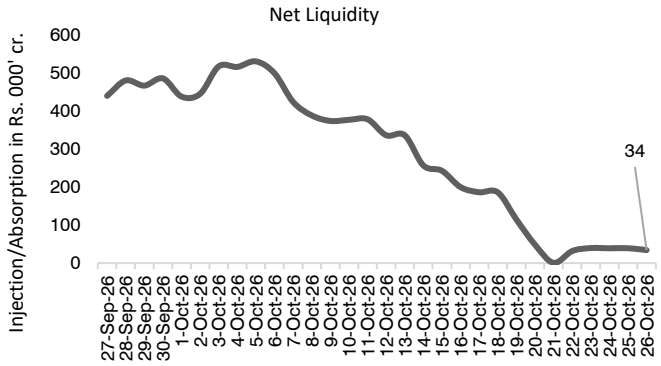
Rs. Cr (Debt)	FII Inv 26 Oct	MF Inv 23 Oct
Buy	847	20,320
Sell	14	29,940
Net	833	-9,620
Net (MTD)	5,847	-41,734
Net (YTD)	55,175	-650,010

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

- Cent raised $15 million to expand its AI-powered preventive healthcare platform and strengthen its healthcare offerings.
- SimpliSmart raised $14 million in a Series B funding round to expand its AI inference platform and accelerate enterprise AI deployment capabilities.
- Advent International raised $30 billion, including nearly $27 billion for its 11th flagship buyout fund, strengthening its capacity for global private equity investments.
- Larsen & Toubro (L&T)'s Transportation Infrastructure business secured design-and-build orders valued between Rs 5,000 crore and Rs 10,000 crore for two key system packages of Bangladesh's Dhaka Metro Line 1.
- Sigma Advanced Systems secured a Rs 973 crore order from NATO, strengthening its defence order book and international presence.
- Tata Motors and Amazon partnered to deploy 3,000 electric trucks for e-commerce logistics, supporting sustainable transportation and fleet decarbonization efforts.
- Mahindra Lifespace Developers signed a joint development agreement for a 10.05-acre land parcel in North Bengaluru, with an estimated gross development value of Rs 1,250 crore.





Global market indices	27 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52377.57	0.03	1.06	13.03	10.17
Nikkei 225	63268.37	1.73	-4.66	23.90	25.25
FTSE	10686.54	-0.75	-0.08	5.01	10.70
Hang Seng	23041.32	-0.73	-5.99	-7.05	-12.83
Taiwan	46096.23	0.12	-4.02	45.31	64.67

Global debt	27 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.99	5.00	5.17	4.65	4.30	4.01
UK 10-Year (%)	5.35	5.35	5.36	5.00	4.88	4.40
German 10-Year (%)	3.36	3.36	3.62	3.13	3.01	2.62
Japan 10-Year (%)	2.80	2.81	3.08	2.78	2.35	1.66

Domestic	27 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141431	-0.20	-7.02	-3.61	16.81
Silver (Rs / Kg)	192499	-1.02	-17.15	-16.35	32.73
Aluminium (Rs / Kg)	330	0.06	-5.72	-7.06	22.31
Copper (Rs / kg)	1403	0.24	-1.35	19.86	38.95
Lead (Rs / kg)	199	-0.67	1.35	0.76	8.76
Zinc (Rs /Kg)	439	0.03	-1.46	36.09	44.27
Nickel (Rs / kg)	1532	0.00	-3.85	-6.41	12.63

Global	27 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4024.26	0.64	-5.62	-11.12	-2.17
Silver (oz/$)	5428.00	0.35	-14.57	-22.97	11.69
Brent ($/bbl)	113.88	-1.67	9.16	-3.78	73.54
NYMEX crude ($/bbl)	99.90	-1.83	8.11	-1.46	62.94

Upcoming market indicators

Date	Indicator	Previous
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
Nov 3	US S&P Global Manufacturing PMI Final, Oct	55.9

Global markets

- Wall Street stocks ended higher on Tuesday, supported by renewed optimism around AI-related stocks, which boosted technology shares and lifted broader market sentiment.
- 10-year US bond yield ended lower at 4.99% as investors remained caution ahead of Fed policy meeting outcome.
- FTSE index closed lower on Tuesday, weighed down by losses in banking stocks, while investor caution persisted ahead of the UK budget announcement.
- Asian markets were trading mostly higher at 8.30 AM.
- US private employers added an average of 16,750 jobs per week during the four weeks ended October 10, 2026, according to the ADP Research Institute.
- US S&P Case-Shiller 20-City Home Price Index rose 2.7% YoY in August 2026, marking its strongest annual increase since May 2025 and exceeding market expectations.
- US single-family home prices backed by Fannie Mae and Freddie Mac increased 2.4% YoY in August 2026, slightly lower than the 2.5% rise recorded in July.
- US Federal Reserve Fifth District Manufacturing Index remained unchanged at -2 in October 2026.
- US Dallas Fed Services Index improved to 4 in October 2026 from -1.8 in September 2026.

Commodity

- Crude oil prices fell by $1.86 to $99.90 per barrel on NYMEX as progress in Middle East diplomatic talks eased concerns over supply disruptions.
- Domestic gold prices declined marginally 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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