Daily Market Monitor

October 29, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	28 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22699	-0.22	-0.36	1.65	-12.48
BSE Sensex	73246	-0.48	0.65	1.80	-13.45
BSE 100	24180	-0.23	-0.96	3.30	-10.94
BSE 200	10556	-0.13	-1.63	3.94	-9.95
BSE 500	34013	-0.04	-2.23	5.69	-9.01
BSE SmallCap	53982	0.21	-5.96	24.91	0.30
BSE MidCap	44104	0.36	-4.89	8.80	-6.13
BSE LargeCap	8903	-10.22	-1.28	3.17	-10.65
Sectoral indices					
BSE IT	29907	-1.77	10.70	7.09	-14.90
BSE Oil & Gas	24262	-2.09	-3.18	-5.08	-12.77
BSE FMCG	16207	-0.48	-5.28	-3.38	-21.43
BSE Auto	56593	1.34	-3.56	7.56	-6.44
BSE Bankex	61006	0.48	-0.88	7.82	-6.93
BSE Teck	15817	-1.84	11.09	7.39	-11.02
BSE Capital Goods	70019	0.16	-5.94	8.99	1.01
BSE Consumer Durable	55390	0.69	-8.67	5.27	-8.60

Turnover (Rs Cr)	28 Oct	27 Oct
BSE Cash	9791	9494
NSE Cash	128964	119872
NSE F&O	9708761	68332428

Rs. Cr (Equity)	FII Inv 27 Oct	MF Inv 23 Oct	DII Inv 28 Oct
Buy	30,869	15,209	17,241
Sell	20,285	12,406	16,598
Net	10,584	2,802	643
Net (MTD)	-26,933	43,787	61,033
Net (YTD)	-294,203	468,678	693,016

	28 Oct	1Day	Month ago	Year ago
USD	95.23	95.16	95.97	88.30
GBP	126.47	126.87	127.03	117.96
Euro	105.86	106.27	109.20	102.96
100 Yen	60.31	60.33	60.88	58.09

Indian markets

- Indian equity benchmarks ended lower on Wednesday, as rising crude oil prices weighed on investor sentiment. However, losses were partly offset by optimism over a major market debut, which bolstered broader market confidence.
- The top losers were Infosys, Reliance Industries, Oil and Natural Gas Corporation, Tech Mahindra, and Bharti Airtel, down 1.55-3.43%.
- The top gainers were Apollo Hospitals Enterprise, Larsen & Toubro, Trent, SBI Life Insurance Company and InterGlobe Aviation, up 2.03-4.43%.

Indian debt

- The interbank call-money rate ended lower at 5.70% on Wednesday compared to 5.74% on Tuesday.
- Government bond prices ended flat on Wednesday, as losses due to oil-driven inflation concerns were offset by short-covering, while investors remained cautious ahead of the US Federal Reserve's policy decision.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 7.44% on Wednesday.

Indian Rupee

- The spot rupee ended lower against the United States dollar on Wednesday, as elevated crude oil prices weighed on market sentiment and traders remained cautious ahead of the US Federal Reserve's policy decision.

Regulatory

- SEBI signed a Memorandum of Understanding (MoU) with the Bank of England to enhance cooperation and oversight of clearing corporations, supporting financial market stability and cross-border regulatory coordination.
- Securities and Exchange Board of India (SEBI) Chairman Tuhin Kanta Pandey said the regulator will review compliance requirements for foreign investors and align regulations with global standards to enhance India's attractiveness as an investment destination and improve market access for overseas capital.
- SEBI Chairman Tuhin Kanta Pandey also said SEBI may evaluate safeguards for the self-listing of stock exchanges, while highlighting potential conflicts of interest and the need for a cautious regulatory approach.

Economy and Government

- India's industrial production growth slowed to 6.7% year-on-year in September 2026, compared to a downwardly revised 7.8% (8% previously) in August 2026.
- Manufacturing output in India increased by 7.6% year-on-year in September 2026.
- India and Mexico agreed on the terms of reference for negotiating a Preferential Trade Agreement (PTA), advancing bilateral trade talks.
- The Cabinet approved the Khelo India Sports Goods Manufacturing Scheme to support the development of the sports goods industry.
- The Union Cabinet approved a 3 percentage point increase in Dearness Allowance (DA) for central government employees and pensioners, raising the allowance to 63% of basic pay/pension from 60%, effective July 1, 2026.

Domestic Debt Market Indicators

Instrument	28 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.70%	5.74%	4.99%	5.35%	7.00%	5.55%
3-Month T-Bill	5.97%	5.86%	5.44%	5.32%	5.40%	5.48%
6-Month T-Bill	6.56%	6.26%	5.85%	5.55%	5.51%	5.55%
1-year T-Bill	6.62%	6.44%	6.07%	5.68%	5.70%	5.55%
3-Month CD	7.58%	7.50%	6.25%	6.80%	7.35%	5.98%
6-Month CD	7.89%	7.90%	6.85%	6.90%	7.30%	6.25%
1-year CD	8.10%	8.05%	7.45%	7.20%	7.25%	6.42%
3-Month CP	8.02%	7.98%	7.17%	7.25%	7.75%	6.55%
6-Month CP	8.30%	8.30%	7.35%	7.40%	7.65%	6.79%
1-year CP	8.50%	8.50%	7.95%	7.70%	7.60%	6.94%
1-year Gilt	6.68%	6.64%	6.07%	5.75%	5.82%	5.63%
3-year Gilt	7.03%	7.00%	6.67%	6.22%	6.43%	5.91%
5-year Gilt	7.39%	7.38%	7.06%	6.42%	6.90%	6.18%
1-year AAA	8.34%	8.34%	7.78%	7.41%	7.57%	6.67%
3-year AAA	8.37%	8.37%	7.96%	7.45%	7.59%	6.86%
5-year AAA	8.37%	8.37%	7.99%	7.46%	7.67%	6.90%
10-year G-sec	7.44%	7.45%	7.19%	6.78%	7.02%	6.54%
Net LAF (Rs Cr)	30419	34082	479892	106954	245161	-8084
Forex reserves ($ bn)	721.02	726.03	765.90	676.24	642.49	702.28

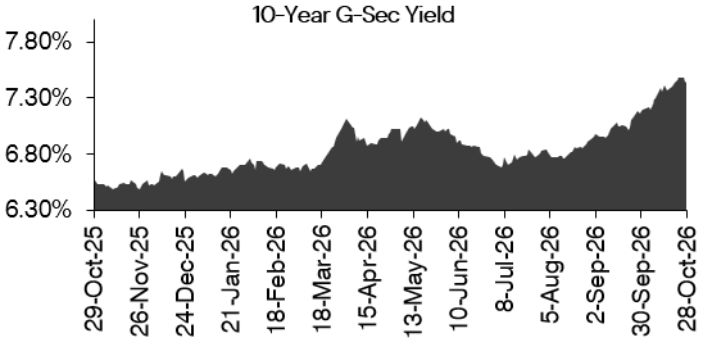
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.56	8.24	8.96	9.04	10.27	10.75
1 Year	6.68	8.34	9.06	9.14	10.37	10.85
3 Year	7.03	8.37	9.09	9.17	10.40	10.88
5 Year	7.39	8.37	9.19	9.27	10.50	10.98
10 Year	7.44	8.32	9.14	9.22	10.45	10.93

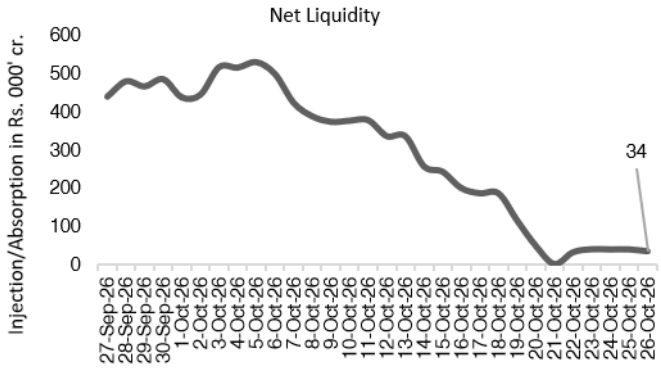
Rs. Cr (Debt)	FII Inv 27 Oct	MF Inv 23 Oct
Buy	1,838	20,320
Sell	1,167	29,940
Net	671	-9,620
Net (MTD)	6,518	-41,734
Net (YTD)	55,846	-650,010

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	6.70% (Sep'26)	8.80% (Jun'26)	6.10% (Sep'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

- GAIL India will invest Rs 600 crore ($63 million) in a heating unit at its Ratnagiri LNG terminal, with the project expected to be completed by June 2027.
- Subros secured a Rs 1,225 crore HVAC supply contract from Maruti Suzuki India Ltd for two vehicle models over a period of approximately seven years.
- JSW Greentech secured an order from JSW Cement to supply 100 AmpStar trucks, strengthening its presence in the commercial electric mobility segment.
- Tata Projects secured an order from Gujarat State Fertilizers & Chemicals (GSFC) to build an acid complex in Gujarat.
- Anant Raj received RERA approval for a project in Gurugram and announced plans to develop 357 MW of data centre capacity.





Global market indices	28 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52475.1	0.19	1.93	13.24	10.00
Nikkei 225	63954.19	1.08	-2.92	25.24	27.35
FTSE	10694.5	0.07	0.09	5.09	10.29
Hang Seng	23094.83	0.23	-6.28	-6.83	-12.34
Taiwan	47035.58	2.04	-2.06	48.27	68.29

Global debt	28 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	5.05	4.99	5.24	4.61	4.30	3.99
UK 10-Year (%)	5.35	5.35	5.40	4.95	4.88	4.40
German 10-Year (%)	3.38	3.36	3.64	3.11	3.01	2.62
Japan 10-Year (%)	2.83	2.80	3.10	2.77	2.35	1.63

Domestic	28 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	142707	0.90	-3.56	-2.74	20.89
Silver (Rs / Kg)	193442	0.49	-13.28	-15.94	36.33
Aluminium (Rs / Kg)	334	1.23	-4.10	-5.92	24.11
Copper (Rs / kg)	1412	0.62	-1.58	20.60	40.99
Lead (Rs / kg)	197	-0.78	1.39	-0.03	6.45
Zinc (Rs /Kg)	438	-0.36	2.64	35.59	42.57
Nickel (Rs / kg)	1541	0.59	-3.92	-5.85	15.11

Global	28 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4061.41	0.92	-5.06	-10.30	1.40
Silver (oz/$)	5446.00	0.33	-15.12	-22.72	16.34
Brent ($/bbl)	115.32	1.26	9.54	-2.56	79.07
NYMEX crude ($/bbl)	102.78	2.88	10.99	1.38	70.79

Upcoming market indicators

Date	Indicator	Previous
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
Nov 4	Eurozone CPI Flash, Oct	104.31

Global markets

- Wall Street stocks closed higher on Wednesday after the Federal Reserve left interest rates unchanged, while an improved assessment of the U.S. economy and expectations of a potential rate hike in December supported investor sentiment.
- 10-year US bond yield ended higher at 5.05% after Federal Reserve kept interest rate unchanged in its October policy meeting.
- FTSE index closed marginally higher on Wednesday, supported by gains in banking stocks after the UK budget imposed a lower-than-feared levy on the sector, although weakness in consumer goods and healthcare stocks limited broader market gains.
- Asian markets were trading mostly higher at 8.30 AM.
- The US Federal Reserve kept the federal funds rate unchanged at 3.75%-4.00% in October 2026, citing strong economic growth, resilient labour market conditions, and still-elevated inflation.

Commodity

- Crude oil prices rose by $2.88 to $102.78 per barrel on NYMEX amid renewed concerns over Middle East supply disruptions following continued fighting in Yemen, an attack on a refinery in Saudi Arabia, and fears of potential U.S. action against Iran.
- Domestic gold prices ended higher due to weakness in the 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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