Daily Market Monitor

October 30, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	29 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22937	1.05	0.97	2.71	-11.96
BSE Sensex	74151	1.24	2.24	3.06	-12.76
BSE 100	24444	1.09	0.61	4.43	-10.46
BSE 200	10667	1.05	-0.12	5.03	-9.57
BSE 500	34352	1.00	-0.78	6.74	-8.63
BSE SmallCap	54308	0.60	-5.50	25.66	0.34
BSE MidCap	44468	0.82	-3.20	9.70	-6.00
BSE LargeCap	8998	1.07	0.15	4.27	-10.22
Sectoral indices					
BSE IT	30205	1.00	13.26	8.16	-14.56
BSE Oil & Gas	24377	0.47	-2.07	-4.63	-14.53
BSE FMCG	16521	1.94	-2.62	-1.51	-20.61
BSE Auto	56491	-0.18	-2.69	7.37	-6.11
BSE Bankex	61718	1.17	0.67	9.08	-6.16
BSE Teck	16002	1.17	13.02	8.65	-10.53
BSE Capital Goods	70254	0.34	-5.50	9.36	0.33
BSE Consumer Durable	56249	1.55	-5.39	6.90	-7.93

Turnover (Rs Cr)	29 Oct	28 Oct
BSE Cash	10389	9791
NSE Cash	117989	128964
NSE F&O	9149915	9708761

Rs. Cr (Equity)	FII Inv 28 Oct	MF Inv 23 Oct	DII Inv 29 Oct
Buy	19,096	15,209	18,459
Sell	16,972	12,406	16,534
Net	2,124	2,802	1,924
Net (MTD)	-24,808	43,787	62,958
Net (YTD)	-292,079	468,678	694,940

	29 Oct	1Day	Month ago	Year ago
USD	95.37	95.23	96.03	88.28
GBP	126.96	126.47	127.17	116.87
Euro	106.21	105.86	109.13	102.68
100 Yen	60.42	60.31	61.06	57.99

Indian markets

- Indian equity benchmarks ended higher on Thursday, supported by positive sentiment after the US Federal Reserve kept interest rates unchanged, while stronger-than-expected corporate earnings helped boost investor confidence.
- The top gainers were Adani Ports and Special Economic Zone, Adani Enterprises, Kotak Mahindra Bank, Eternal and Power Grid Corporation of India, up 3.42-6.29%.
- The top losers were Trent, Maruti Suzuki India, Bajaj Auto, SBI Life Insurance Company and Eicher Motors, down 0.85-1.79%.

Indian debt

- The interbank call-money rate ended lower at 5.58% on Thursday compared to 5.70% on Wednesday.
- Government bond prices ended higher on Thursday, supported by short-covering and improved sentiment after the US Federal Reserve maintained interest rates.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.39% on Thursday compared to 7.44% on Wednesday.

Indian Rupee

- The spot rupee closed flat against the United States dollar on Thursday as intervention by the Reserve Bank of India and softer oil prices offset dollar demand, while gains in equities and bonds supported overall investor sentiment.

Regulatory

- The Reserve Bank of India (RBI)'s revised forex derivative norms are expected to increase FCNR(B) hedging costs for banks.

Economy and Government

- The Ministry of Finance's nowcasting model estimates India's GDP growth at 7.35% in Q2 FY27, indicating continued economic momentum supported by resilient domestic demand and investment activity.
- Chief Economic Adviser V. Anantha Nageswaran called for greater economic resilience, saying India is at an inflection point comparable to 1991.
- Commerce Minister Piyush Goyal said the India-US Trade Facilitation Portal has attracted around 3,500 registrations since its launch, highlighting growing export interest among Indian MSMEs and first-time exporters.
- Commerce Minister Piyush Goyal said the proposed India-US trade agreement will protect all sensitive Indian interests while expanding bilateral trade and economic cooperation.
- The Ministry of New and Renewable Energy (MNRE) said Indian firms have signed green hydrogen offtake agreements exceeding 550,000 tonnes per annum, supporting investments of about Rs 90,000 crore in the sector.
- The Uttar Pradesh Government is considering an investment of Rs 5,500 crore to strengthen green energy infrastructure and support the state's renewable energy transition.
- The government plans to introduce a rating framework for national highway corridors based on road quality and safety standards.

Domestic Debt Market Indicators

Instrument	29 Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.58%	5.70%	5.15%	5.25%	7.00%	5.40%
3-Month T-Bill	5.91%	5.97%	5.47%	5.34%	5.40%	5.46%
6-Month T-Bill	6.52%	6.56%	5.84%	5.58%	5.51%	5.58%
1-year T-Bill	6.64%	6.62%	6.06%	5.71%	5.70%	5.57%
3-Month CD	7.54%	7.58%	6.34%	6.80%	7.35%	6.02%
6-Month CD	7.85%	7.89%	6.92%	6.95%	7.30%	6.23%
1-year CD	8.10%	8.10%	7.45%	7.20%	7.25%	6.40%
3-Month CP	8.02%	8.02%	7.07%	7.25%	7.75%	6.58%
6-Month CP	8.30%	8.30%	7.37%	7.35%	7.65%	6.79%
1-year CP	8.50%	8.50%	7.95%	7.70%	7.60%	6.94%
1-year Gilt	6.67%	6.68%	6.12%	5.72%	5.82%	5.63%
3-year Gilt	7.00%	7.03%	6.70%	6.24%	6.43%	5.89%
5-year Gilt	7.35%	7.39%	7.02%	6.44%	6.90%	6.16%
1-year AAA	8.34%	8.34%	7.76%	7.42%	7.57%	6.67%
3-year AAA	8.37%	8.37%	7.96%	7.46%	7.59%	6.86%
5-year AAA	8.35%	8.37%	7.99%	7.47%	7.67%	6.90%
10-year G-sec	7.39%	7.44%	7.16%	6.80%	7.02%	6.53%
Net LAF (Rs Cr)	13453	30419	466404	116296	245161	14590
Forex reserves ($ bn)	721.02	726.03	765.90	676.24	642.49	702.28

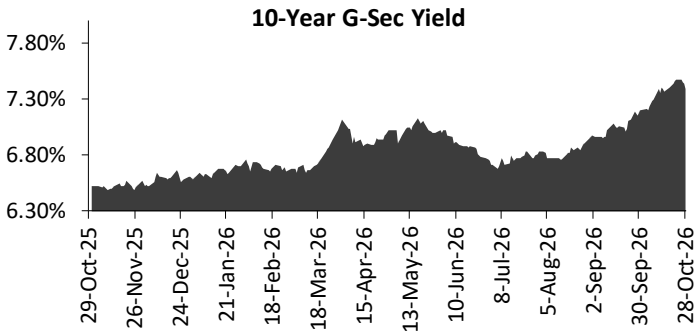
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.52	8.20	8.92	9.00	10.23	10.71
1 Year	6.67	8.34	9.06	9.14	10.37	10.85
3 Year	7.00	8.37	9.09	9.17	10.40	10.88
5 Year	7.35	8.35	9.17	9.25	10.48	10.96
10 Year	7.39	8.30	9.12	9.20	10.43	10.91

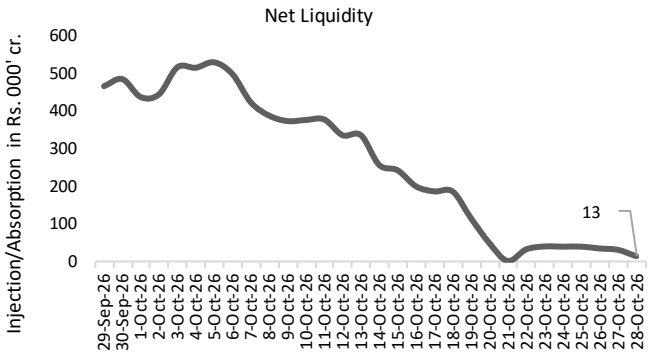
Rs. Cr (Debt)	FII Inv 28 Oct	MF Inv 23 Oct
Buy	1,563	20,320
Sell	51	29,940
Net	1,512	-9,620
Net (MTD)	8,029	-41,734
Net (YTD)	57,358	-650,010

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

- Afcons Infrastructure had been awarded two significant engineering, procurement and construction (EPC) contracts in Uttar Pradesh with a combined value of nearly Rs 3,469 crore.
- ACME Solar Holdings Limited signed a 25-year power purchase agreement (PPA) with NTPC Limited for a 400 MW renewable energy project, strengthening its long-term revenue visibility and expanding its clean energy portfolio.
- Indian Hotels Company Limited (IHCL) and Adani Airport Holdings Limited (AAHL) signed an agreement to develop and operate eight airport-linked hotels with over 2,000 rooms across Mumbai, Ahmedabad, Lucknow, and Guwahati, expanding hospitality infrastructure at key aviation hubs.





Global market indices	29 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52342.56	-0.25	1.93	12.95	9.89
Nikkei 225	64659.47	1.10	-1.26	26.63	26.02
FTSE	10722.07	0.26	0.80	5.36	9.90
Hang Seng	22958.65	-0.59	-6.38	-7.38	-12.86
Taiwan	46368.33	-1.42	-2.65	46.17	63.88

Global debt	29 Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.98	5.05	5.26	4.67	4.30	4.08
UK 10-Year (%)	5.29	5.35	5.41	5.04	4.88	4.40
German 10-Year (%)	3.36	3.38	3.61	3.16	3.01	2.62
Japan 10-Year (%)	2.84	2.83	3.08	2.76	2.35	1.65

Domestic	29 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	142255	-0.32	-3.67	-3.05	17.93
Silver (Rs / Kg)	190478	-1.53	-14.04	-17.23	29.90
Aluminium (Rs / Kg)	332	-0.60	-5.14	-6.49	21.43
Copper (Rs / kg)	1412	0.00	-1.59	20.60	38.59
Lead (Rs / kg)	198	0.48	-0.40	0.46	7.75
Zinc (Rs /Kg)	434	-0.85	1.20	34.45	39.80
Nickel (Rs / kg)	1529	-0.78	-3.80	-6.59	12.40

Global	29 Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4039.07	-0.55	-2.34	-10.79	1.81
Silver (oz/$)	5362.00	-1.54	-12.59	-23.91	13.60
Brent ($/bbl)	114.88	-0.38	11.98	-2.93	76.96
NYMEX crude ($/bbl)	102.00	-0.76	14.12	0.61	68.65

Upcoming market indicators

Date	Indicator	Previous
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
Nov 5	Eurozone PPI, Sep	8.2%

Global markets

- Wall Street stocks index ended lower on Thursday as concerns over heavy AI-related spending and weak corporate earnings outweighed stronger-than-expected U.S. economic growth.
- 10-year US bond yield ended lower at 4.98% as investors moved into Treasuries despite stronger-than-expected U.S. Q3 GDP growth, while digesting the Federal Reserve's decision to keep interest rates unchanged and the latest inflation data.
- FTSE ended higher on Thursday supported by gains in energy stocks after Shell reported strong profit growth.
- Asian markets were trading mostly mixed at 8.30 AM.
- US economy grew at an annualized rate of 3.4% in Q3 2026, compared to 2.2% in Q2 2026.
- US initial jobless claims decreased by 1,000 to 194,000 in the week ended October 24, 2026 compared to 195,000 in the previous week.
- US PCE inflation rose to 3.6% year-on-year in September 2026, compared to 3.4% in August 2026.
- US core PCE price index increased to 3.1% year-on-year in September 2026, up from 3.0% in August.
- Eurozone consumer confidence fell to -17.9 in October 2026 from -16.8 in September.
- Eurozone Economic Sentiment Indicator declined to 96.9 in October 2026.
- The European Central Bank (ECB) left its key interest rates unchanged at its October 2026 meeting, maintaining the main refinancing rate at 2.65%, the deposit facility rate at 2.50%, and the marginal lending facility rate at 2.90%.

Commodity

- Crude oil prices declined by 78 cents to $102 per barrel on NYMEX as renewed U.S.-Iran diplomatic efforts eased some concerns over potential Middle East supply disruptions
- Domestic gold prices declined 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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