Daily Market Monitor

November 03, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	2 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23441	1.68	4.54	4.97	-8.87
BSE Sensex	75693	1.66	5.26	5.21	-9.82
BSE 100	24878	1.63	3.53	6.29	-7.82
BSE 200	10830	1.59	2.54	6.64	-7.21
BSE 500	34787	1.57	1.65	8.09	-6.52
BSE SmallCap	53863	1.46	-5.20	24.63	-0.03
BSE MidCap	44607	1.29	-1.63	10.04	-5.18
BSE LargeCap	9150	1.61	3.00	6.04	-7.61
Sectoral indices					
BSE IT	30573	-0.30	12.41	9.48	-12.68
BSE Oil & Gas	25513	4.89	3.62	-0.18	-10.92
BSE FMCG	16565	0.94	-0.52	-1.25	-19.82
BSE Auto	56600	1.13	0.42	7.58	-5.46
BSE Bankex	61744	0.54	0.63	9.13	-4.92
BSE Teck	16186	0.06	13.32	9.90	-8.06
BSE Capital Goods	70204	2.03	-5.30	9.28	-0.28
BSE Consumer Durable	56847	1.95	-1.67	8.03	-6.13

Turnover (Rs Cr)	2 Nov	30 Oct
BSE Cash	9049	9343
NSE Cash	116328	120852
NSE F&O	29355567	19415727

Rs. Cr (Equity)	FII Inv 30 Oct	MF Inv 30 Oct	DII Inv 2 Nov
Buy	21,473	727	16,644
Sell	17,015	805	17,461
Net	4,458	-78	-818
Net (MTD)	-21,153	39,251	-818
Net (YTD)	-288,424	464,141	693,305

	2 Nov	1Day	Month ago	Year ago
USD	94.88	95.25	95.99	88.72
GBP	127.15	127.60	127.22	116.69
Euro	106.12	106.55	108.62	102.67
100 Yen	60.10	60.45	60.67	57.61

Indian markets

- Indian equity benchmarks closed higher on Monday, supported by lower crude oil prices, strong corporate earnings and renewed foreign investor buying.
- The top gainers were Reliance, Tata Steel, JSW Steel, Coal India and Shriram Finance, up 4.88-11.60%.
- The top losers were Infosys, ICICI Bank, Dr Reddy's Laboratories, Kotak Bank and Axis Bank, down 0.66-2.03%.

Indian debt

- The interbank call-money rate ended lower at 5.51% on Monday compared to 5.72% on Friday.
- Government bond prices ended higher on Monday as easing crude oil prices reduced inflation concerns and boosted demand for government securities.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.32% on Monday compared to 7.41% on Friday..

Indian Rupee

- The spot rupee closed flat against the United States dollar on Monday, as weakness in Asian currencies and a cautious global risk environment weighed on sentiment, while softer crude oil prices offered some support.

Regulatory

- The Employees' Provident Fund Organisation (EPFO) launched a WhatsApp-based service that enables subscribers to check PF balances, view recent transactions, and download passbooks.
- TRAI tightened telecom complaint redressal rules and capped penalties at Rs 20 lakh, aiming to strengthen consumer protection and service accountability.

Economy and Government

- India's HSBC Manufacturing PMI slowed down to 54.7 in October 2026 compared to 55.1 in September 2026.
- Prime Minister Narendra Modi said India's economy continues to record strong growth despite the ongoing crisis in West Asia.
- Finance Minister Nirmala Sitharaman said India does not face economic fragility and urged stakeholders to remain confident about the country's economic prospects.
- India and the European Union (EU) discussed implementation issues related to their proposed free trade agreement ahead of its expected signing in December 2026.
- The Ministry of Defence signed contracts worth Rs 53,866.5 crore with Garden Reach Shipbuilders & Engineers (GRSE) and Goa Shipyard Limited (GSL) for the construction of eight next-generation corvettes for the Indian Navy.

Domestic Debt Market Indicators

Instrument	2 Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.51%	5.72%	5.20%	5.35%	7.00%	5.10%
3-Month T-Bill	5.89%	5.91%	5.45%	5.34%	5.40%	5.45%
6-Month T-Bill	6.36%	6.54%	5.94%	5.59%	5.51%	5.58%
1-year T-Bill	6.54%	6.67%	6.11%	5.71%	5.70%	5.58%
3-Month CD	7.60%	7.56%	6.10%	6.77%	7.35%	6.01%
6-Month CD	7.85%	7.85%	7.16%	6.90%	7.30%	6.25%
1-year CD	8.05%	8.10%	7.40%	7.20%	7.25%	6.44%
3-Month CP	8.05%	8.05%	7.00%	7.30%	7.75%	6.54%
6-Month CP	8.30%	8.30%	7.60%	7.33%	7.65%	6.77%
1-year CP	8.50%	8.50%	7.90%	7.70%	7.60%	6.94%
1-year Gilt	6.68%	6.67%	6.16%	5.76%	5.82%	5.67%
3-year Gilt	7.09%	7.03%	6.74%	6.26%	6.43%	5.92%
5-year Gilt	7.25%	7.34%	7.03%	6.45%	6.90%	6.18%
1-year AAA	8.30%	8.34%	7.77%	7.44%	7.57%	6.67%
3-year AAA	8.32%	8.37%	7.98%	7.49%	7.59%	6.86%
5-year AAA	8.30%	8.34%	8.01%	7.49%	7.67%	6.90%
10-year G-sec	7.33%	7.42%	7.20%	6.83%	7.02%	6.53%
Net LAF (Rs Cr)	196397	30454	437549	232932	245161	123131
Forex reserves ($ bn)	719.75	721.02	765.90	682.35	642.49	695.36

Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.36	8.20	8.92	9.00	10.23	10.71
1 Year	6.68	8.30	9.02	9.10	10.33	10.81
3 Year	7.09	8.32	9.04	9.12	10.35	10.83
5 Year	7.25	8.30	9.12	9.20	10.43	10.91
10 Year	7.33	8.31	9.13	9.21	10.44	10.92

Rs. Cr (Debt)	FII Inv 30 Oct	MF Inv 30 Oct
Buy	586	80
Sell	1,134	1,417
Net	-548	-1,338
Net (MTD)	7,457	-68,194
Net (YTD)	56,785	-676,471

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

- Larsen & Toubro (L&T) secured high-rise construction contracts valued between Rs 1,000 crore and Rs 2,500 crore across Mumbai, Bengaluru, and Hyderabad.
- Ambuja Cements plans to invest Rs 14,500 crore to add 30 million tonnes per annum (MTPA) of cement capacity by FY30, supporting its expansion strategy amid growing demand.
- JioHotstar launched StreamToCart Ads in partnership with Instamart, enabling in-stream shopping and providing advertisers with measurable purchase-conversion data.
- HDFC Capital partnered with DivyaSree Developers to create a Rs 1,500 crore residential development platform, aimed at expanding housing projects in key markets.
- Razorpay received a final payment service provider licence from the International Financial Services Centres Authority (IFSCA) to operate from GIFT City, enabling foreign-currency payment processing and broader cross-border payment services.
- South Eastern Coalfields Ltd (SECL) filed draft IPO papers with SEBI, with parent Coal India proposing to offload 66.8 crore shares through an offer for sale.
- Nugraj Developers raised a Rs 50 crore investment from Capri Global to expand its real estate projects in Kharkhoda and Sonipat.

Global market indices	2 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51983.98	0.41	1.58	12.18	9.30
Nikkei 225	63081.86	-0.33	-7.65	23.54	20.36
FTSE	10761.33	0.29	2.86	5.75	10.74
Hang Seng	23393.32	0.42	-2.42	-5.63	-9.70
Taiwan	44920.14	-0.65	-7.33	41.60	59.10

Global debt	2 Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.91	4.94	5.28	4.75	4.30	4.11
UK 10-Year (%)	5.20	5.29	5.38	5.06	4.88	4.40
German 10-Year (%)	3.29	3.32	3.45	3.20	3.01	2.64
Japan 10-Year (%)	2.77	2.77	3.10	2.80	2.35	1.66

Domestic	2 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	137524	-1.81	-7.16	-6.28	13.87
Silver (Rs / Kg)	179972	-0.76	-18.50	-21.80	20.69
Aluminium (Rs / Kg)	333	0.11	-2.55	-6.43	22.83
Copper (Rs / kg)	1399	0.27	-1.01	19.50	38.73
Lead (Rs / kg)	198	-0.63	0.79	0.56	7.66
Zinc (Rs /Kg)	432	1.14	1.77	33.78	40.21
Nickel (Rs / kg)	1508	-0.52	-4.44	-7.87	12.26

Global	2 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3885.53	-3.33	-6.88	-14.18	-2.93
Silver (oz/$)	4930.00	-5.75	-18.99	-30.04	1.02
Brent ($/bbl)	104.77	-10.94	2.46	-11.47	61.76
NYMEX crude ($/bbl)	96.46	-7.36	5.87	-4.85	58.18

Upcoming market indicators

Date	Indicator	Previous
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%
Nov 6	US Unemployment Rate, Oct	4.2%
Nov 9	China Inflation Rate, Oct	0.9%

Global markets

- Wall Street stocks closed mixed on Monday, with Dow Jones closing higher on sector specific strength, while Nasdaq declined as weakness in technology stocks, weighed on sentiment ahead of key earnings releases.
- 10-year US bond yield ended lower at 4.91%, tracking sharp fall in the oil prices.
- FTSE index closed higher on Monday as a sharp decline in crude oil prices improved risk appetite, while investors awaited the Bank of England's interest rate decision later this week.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone S&P Global Manufacturing PMI edged down to 52.7 in October 2026, compared to 52.9 in September 2026.
- UK Manufacturing PMI increased to 52.8 in October 2026 compared to 51.9 in September 2026.
- Japan S&P Global Manufacturing PMI eased to 53.3 in October 2026, compared to 54.1 in September 2026.

Commodity

- Crude oil prices rose by $5.76 to $89.61 a barrel on the NYMEX as disruptions in the Strait of Hormuz and uncertainty over US-Iran peace talks heightened fears of supply shortages.
- Domestic gold prices rose due to rising safe haven demand amid resurfacing geopolitical tensions.

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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