Daily Market Monitor

November 04, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	3 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23811	1.58	6.19	6.62	-7.58
BSE Sensex	76918	1.62	6.96	6.91	-8.41
BSE 100	25251	1.50	5.08	7.88	-6.69
BSE 200	10977	1.36	3.94	8.09	-6.28
BSE 500	35221	1.25	2.92	9.44	-5.73
BSE SmallCap	54084	0.41	-4.81	25.14	-0.32
BSE MidCap	44921	0.70	-0.93	10.81	-5.11
BSE LargeCap	9282	1.44	4.49	7.56	-6.57
Sectoral indices					
BSE IT	30673	0.32	12.77	9.83	-12.29
BSE Oil & Gas	25670	0.61	4.26	0.43	-11.22
BSE FMCG	17125	3.38	2.85	2.09	-17.06
BSE Auto	57530	1.64	2.07	9.34	-4.04
BSE Bankex	62426	1.10	1.74	10.33	-4.44
BSE Teck	16431	1.52	15.04	11.57	-6.96
BSE Capital Goods	70395	0.27	-5.04	9.58	-0.18
BSE Consumer Durable	57836	1.74	0.05	9.91	-4.29

Turnover (Rs Cr)	3 Nov	2 Nov
BSE Cash	9798	9049
NSE Cash	127592	116328
NSE F&O	60663199	29355567

Rs. Cr (Equity)	FII Inv 2 Nov	MF Inv 30 Oct	DII Inv 3 Nov
Buy	16,835	727	16,724
Sell	13,483	805	20,403
Net	3,352	-78	-3,679
Net (MTD)	3,352	39,251	-4,071
Net (YTD)	-285,072	464,141	690,052

	3 Nov	1Day	Month ago	Year ago
USD	94.86	94.88	95.99	88.79
GBP	127.21	127.15	127.22	116.70
Euro	106.14	106.12	108.62	102.43
100 Yen	60.09	60.10	60.67	57.59

Indian markets

- Indian equity benchmark indices ended higher on Tuesday, supported by strong corporate earnings, softer crude oil prices and renewed foreign investor buying.
- The top gainers were BSE, Nestle India, Tata Consumer Products, Asian Paints and Bharti Airtel, which rose 3.42-6.29%.
- The top losers were Power Grid Corporation of India, State Bank of India, Oil and Natural Gas Corporation, Adani Enterprises and Tata Steel, which fell 0.49-3.04%.

Indian debt

- The interbank call-money rate ended higher at 5.65% on Tuesday compared to 5.51% on Monday.
- Government bond prices ended marginally higher on Tuesday as softer crude oil prices supported sentiment, although caution ahead of the US midterm elections and profit-booking capped gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.30% on Tuesday compared to 7.32% on Monday.

Indian Rupee

- The Indian rupee traded in a narrow range vs the United States (US) dollar on Tuesday, aided by Reserve Bank of India (RBI)'s initiatives to ease pressure on the spot market, while underlying concerns over further depreciation and demand for downside protection limited the appreciation in the Indian currency.

Regulatory

- The Reserve Bank of India (RBI) clarified that a purported circular warning of shortages of Rs 10, Rs 20, and Rs 50 currency notes during Diwali is fake and reaffirmed that adequate currency supplies are available.
- The Reserve Bank of India (RBI) eased foreign exchange reporting requirements for small-value services exports and imports, reducing compliance for resident individuals while retaining reporting requirements for larger transactions and non-individual entities.
- Securities and Exchange Board of India (SEBI) issued detailed regulations for depositary receipts backed by REIT and InvIT units, enhancing capital-raising avenues and broadening global investor access to India's real estate and infrastructure investment vehicles.
- Securities and Exchange Board of India (SEBI) signed a Memorandum of Understanding (MoU) with the Digital India Bhashini Division (DIBD) to provide investor services and regulatory communications in regional languages, enhancing accessibility and financial inclusion across India.

Economy and Government

- Prime Minister Narendra Modi inaugurated the 2.3-km Pink Line of Pune Metro and laid the foundation stone for four new metro corridors, aimed at expanding urban transport infrastructure in Pune.
- The Ministry of Defence awarded Garden Reach Shipbuilders & Engineers (GRSE) a Rs 32,000 crore contract to build five next-generation corvettes for the Indian Navy.
- Union Minister G. Kishan Reddy said India must develop indigenous technologies to strengthen long-term energy security and reduce external dependence.
- The Central Government proposed expanding the number of entry points for imports of drugs and medical devices, aiming to improve supply chain efficiency and ease of trade.

Domestic Debt Market Indicators

Instrument	3 Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.65%	5.51%	5.20%	5.10%	7.00%	5.00%
3-Month T-Bill	5.92%	5.89%	5.45%	5.32%	5.40%	5.46%
6-Month T-Bill	6.35%	6.36%	5.94%	5.57%	5.51%	5.56%
1-year T-Bill	6.58%	6.54%	6.11%	5.70%	5.70%	5.56%
3-Month CD	7.60%	7.60%	6.10%	6.77%	7.35%	6.00%
6-Month CD	7.85%	7.85%	7.16%	6.85%	7.30%	6.24%
1-year CD	8.05%	8.05%	7.40%	7.20%	7.25%	6.44%
3-Month CP	8.05%	8.05%	7.00%	7.15%	7.75%	6.52%
6-Month CP	8.35%	8.30%	7.60%	7.30%	7.65%	6.77%
1-year CP	8.50%	8.50%	7.90%	7.67%	7.60%	6.94%
1-year Gilt	6.57%	6.68%	6.16%	5.75%	5.82%	5.66%
3-year Gilt	7.06%	7.09%	6.74%	6.25%	6.43%	5.91%
5-year Gilt	7.22%	7.25%	7.03%	6.42%	6.90%	6.17%
1-year AAA	8.30%	8.30%	7.77%	7.42%	7.57%	6.66%
3-year AAA	8.32%	8.32%	7.98%	7.49%	7.59%	6.85%
5-year AAA	8.30%	8.30%	8.01%	7.49%	7.67%	6.89%
10-year G-sec	7.31%	7.33%	7.20%	6.84%	7.02%	6.53%
Net LAF (Rs Cr)	203088	196397	437549	243841	245161	175304
Forex reserves ($ bn)	719.75	721.02	765.90	682.35	642.49	695.36

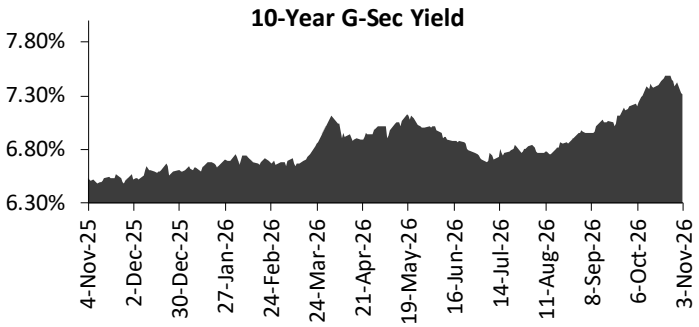
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.35	8.20	8.92	9.00	10.23	10.71
1 Year	6.57	8.30	9.02	9.10	10.33	10.81
3 Year	7.06	8.32	9.04	9.12	10.35	10.83
5 Year	7.22	8.30	9.12	9.20	10.43	10.91
10 Year	7.31	8.23	9.05	9.13	10.36	10.84

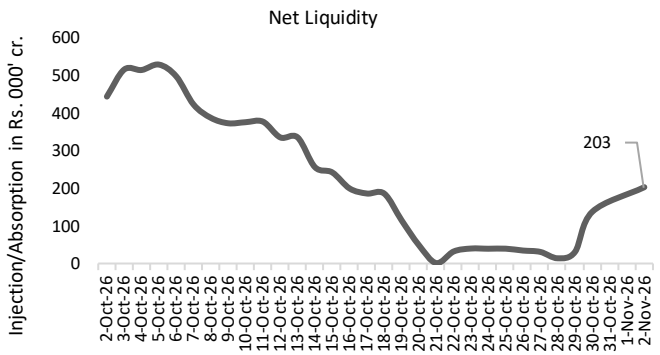
Rs. Cr (Debt)	FII Inv 2 Nov	MF Inv 30 Oct
Buy	276	80
Sell	133	1,417
Net	143	-1,338
Net (MTD)	7,600	-68,194
Net (YTD)	56,928	-676,471

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

- ReNew signed a memorandum of understanding (MoU) with the Odisha government at the Bharat Renewable Energy Summit to develop a 1,500 MW pumped hydro storage project in Ganjam district, involving an estimated investment of Rs 9,000 crore.
- Tata Projects secured a major contract to develop infrastructure for a global automaker's manufacturing facility in Maharashtra, strengthening its industrial construction order book and presence in the automotive sector.
- Oracle raised $20 billion through stock and bond issuances to fund its artificial intelligence expansion and strengthen its AI infrastructure capabilities.
- Giva has raised more than $100 million in a funding round led by Multiples Alternate Asset Management.
- Solgram raised more than $1 million in a pre-seed funding round led by DSG Consumer Partners and Saama Capital to support its growth and business expansion.
- Razorpay received approval from SEBI to launch its initial public offering (IPO).





Global market indices	3 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51786.72	-0.38	1.19	11.75	9.40
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	10638.43	-1.14	1.69	4.54	9.66
Hang Seng	23525.97	0.57	-1.86	-5.09	-10.06
Taiwan	43307.54	-3.59	-10.66	36.52	52.84

Global debt	3 Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.95	4.91	5.28	4.70	4.30	4.13
UK 10-Year (%)	5.25	5.20	5.38	4.95	4.88	4.43
German 10-Year (%)	3.31	3.29	3.45	3.15	3.01	2.66
Japan 10-Year (%)	2.78	2.77	3.10	2.82	2.35	1.65

Domestic	3 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	137576	0.04	-7.13	-6.24	13.91
Silver (Rs / Kg)	176425	-1.97	-20.11	-23.34	18.17
Aluminium (Rs / Kg)	332	-0.24	-2.78	-6.66	20.68
Copper (Rs / kg)	1393	-0.48	-1.49	18.93	37.39
Lead (Rs / kg)	198	-0.25	0.53	0.30	7.91
Zinc (Rs /Kg)	428	-0.96	0.79	32.50	38.08
Nickel (Rs / kg)	1497	-0.75	-5.15	-8.56	11.16

Global	3 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3959.84	1.91	-5.10	-12.54	-1.08
Silver (oz/$)	5083.00	3.10	-16.48	-27.87	4.42
Brent ($/bbl)	103.60	-1.12	1.32	-12.46	59.65
NYMEX crude ($/bbl)	96.09	-0.38	5.47	-5.22	57.40

Upcoming market indicators

Date	Indicator	Previous
Nov 4	Eurozone CPI Flash, Oct	104.31
Nov 5	Eurozone PPI, Sep	8.2%
Nov 5	UK BoE Interest Rate Decision	3.75%
Nov 6	US Unemployment Rate, Oct	4.2%
Nov 9	China Inflation Rate, Oct	0.9%

Global markets

- Wall Street stocks closed mixed on Tuesday, with Dow Jones closing lower as weakness in non-technology sectors weighed on sentiment, while Nasdaq advanced on gains in AI-related stocks ahead of the US midterm election results.
- 10-year US bond yield ended higher at 4.95%, as investors assessed the potential fiscal implications of the US midterm election results.
- FTSE index closed lower on Tuesday dragged down by declines in mining and banking stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- US S&P Global Manufacturing PMI edged down to 54.9 compared to 55.9 in September 2026.
- US ISM Manufacturing PMI edged up to 55.5 in October 2026, compared to 54.5 in September 2026.
- China RatingDog General Services PMI eased to 50.8 in October 2026 compared to 51.6 in September 2026 while the RatingDog General Composite PMI edged down to 52.0 from 52.4.

Commodity

- Crude oil prices fell by 37 cents to $96.09 per barrel on NYMEX as ongoing peace talks eased concerns over potential supply disruptions and reduced the geopolitical risk premium in oil markets.
- Domestic gold prices rose marginally due to short covering.

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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