Daily Market Monitor

Nov 05, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	04 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23961	0.63	6.86	7.30	-6.40
BSE Sensex	77301	0.50	7.50	7.44	-7.38
BSE 100	25443	0.76	5.88	8.70	-5.39
BSE 200	11088	1.00	4.98	9.17	-4.79
BSE 500	35615	1.12	4.07	10.67	-4.13
BSE SmallCap	55244	2.14	-2.77	27.83	2.53
BSE Mid cap	45530	1.36	0.41	12.32	-3.57
BSE LargeCap	9371	0.96	5.48	8.59	-5.09

Sectoral indices					
BSE IT	30303	-1.21	12.41	8.51	-12.42
BSE Oil & Gas	26162	1.92	3.62	2.36	-9.15
BSE FMCG	17363	1.39	-0.52	3.51	-15.31
BSE Auto	58156	1.09	0.42	10.53	-2.24
BSE Bankex	62873	0.71	0.63	11.12	-3.33
BSE Teck	16293	-0.84	13.32	10.63	-7.61
BSE Capital Goods	72931	3.60	-5.30	13.52	3.62
BSE Consumer Durable	59079	2.15	-1.67	12.28	-2.34

Turnover (Rs Cr)	04 Nov	03 Nov
BSE Cash	10715	9798
NSE Cash	130767	127592
NSE F&O	12241596	60663199

Rs. Cr (Equity)	FII Inv 03 Nov	MF Inv 30 Oct	DII Inv 04 Nov
Buy	16,835	727	16,393
Sell	13,483	805	20,105
Net	3,352	-78	-3,712
Net (MTD)	3,352	39,251	-7,783
Net (YTD)	-285,072	464,141	686,339

	04 Nov	1Day	Month ago	Year ago
USD	94.84	94.86	95.99	88.64
GBP	127.65	127.21	127.22	116.32
Euro	106.53	106.14	108.62	102.14
100 Yen	59.99	60.09	60.67	57.72

Indian markets

- Indian equity benchmarks ended higher on Wednesday on optimism over foreign fund inflows and investors closely monitored post-elections signals and its potential impact on policies in the US
- The top gainers were Bharat Electronics, Adani Enterprises, Titan Company, Jio Financial Services and Max Healthcare Institute—up 3.53-4.71%.
- The top losers were Tata Consultancy Services, HCL Technologies, BSE, Infosys and Eternal—down 1.42-2.52%.

Indian debt

- The interbank call-money rate ended lower at 5.60% on Wednesday compared to 5.65% on Tuesday.
- Government bond prices ended higher on Wednesday as hopes of a Middle East peace deal eased crude oil prices, reducing inflation concerns.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.19% on Wednesday compared to 7.30% on Tuesday.

Indian Rupee

- The spot rupee closed marginally higher against the United States dollar on Wednesday, supported by a weaker US dollar and softer oil prices as investors assessed the outcome of the US midterm elections.

Regulatory

- The Reserve Bank of India (RBI) constituted a technical consultative committee to review issues related to the money, government securities, foreign exchange, and derivatives markets.
- SEBI eased digital KYC requirements for NRIs and foreign nationals, with the revised framework set to take effect from December 3, 2026.
- The Pension Fund Regulatory and Development Authority (PFRDA) aims to expand the National Pension System (NPS) through greater bank participation and UPI integration, targeting a corpus of around Rs 100 lakh crore by 2040.

Economy and Government

- India's HSBC Composite PMI rose to 56.2 in October 2026 compared to 55.9 in September, while the Services PMI edged higher to 55.8 from 55.2.
- Commerce and Industry Minister Piyush Goyal held talks with Denmark's Minister for Business and Competitiveness to strengthen bilateral trade, investment, and industrial cooperation, with a focus on renewable energy and green technologies.
- The Ministry of Coal, Ministry of Power, and Indian Railways have jointly directed a significant increase in coal inventories at power plants to at least 55 million tonnes by March 2027, from around 18 million tonnes currently, to ensure adequate fuel availability and energy security.

Domestic Debt Market Indicators

Instrument	04 Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.60%	5.65%	5.20%	4.60%	7.00%	4.95%
3-Month T-Bill	5.90%	5.92%	5.45%	5.32%	5.40%	5.46%
6-Month T-Bill	6.41%	6.35%	5.94%	5.56%	5.51%	5.55%
1-year T-Bill	6.60%	6.58%	6.11%	5.70%	5.70%	5.56%
3-Month CD	7.52%	7.60%	6.10%	6.75%	7.35%	6.00%
6-Month CD	7.85%	7.85%	7.16%	6.80%	7.30%	6.24%
1-year CD	8.05%	8.05%	7.40%	7.20%	7.25%	6.44%
3-Month CP	8.02%	8.05%	7.00%	7.15%	7.75%	6.52%
6-Month CP	8.35%	8.35%	7.60%	7.28%	7.65%	6.77%
1-year CP	8.50%	8.50%	7.90%	7.67%	7.60%	6.94%
1-year Gilt	6.51%	6.57%	6.16%	5.79%	5.82%	5.62%
3-year Gilt	6.97%	7.06%	6.74%	6.23%	6.43%	5.91%
5-year Gilt	7.12%	7.22%	7.03%	6.41%	6.90%	6.16%
1-year AAA	8.23%	8.30%	7.77%	7.38%	7.57%	6.66%
3-year AAA	8.26%	8.32%	7.98%	7.49%	7.59%	6.85%
5-year AAA	8.20%	8.30%	8.01%	7.49%	7.67%	6.89%
10-year G-sec	7.19%	7.31%	7.20%	6.82%	7.02%	6.53%
Net LAF (Rs lakh Cr)	-2.08	-2.08	-5.16	-3.34	-3.09	-2.08
Forex reserves ($ bn)	719.75	721.02	734.61	692.87	688.06	689.73

Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 Month	6.41	8.20	8.92	9.00	10.23	10.71
1 Year	6.51	8.23	8.95	9.03	10.26	10.74
3 Year	6.97	8.26	8.98	9.06	10.29	10.77
5 Year	7.12	8.20	9.02	9.10	10.33	10.81
10 Year	7.21	8.15	8.97	9.05	10.28	10.76

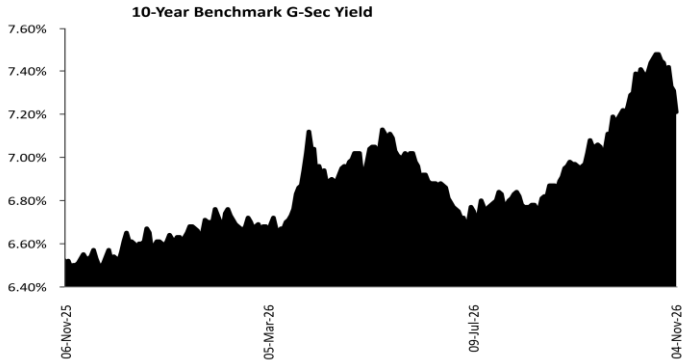
Rs. Cr (Debt)	FII Inv 03 Nov	MF Inv 30 Oct
Buy	331	80
Sell	249	1417
Net	81	-1338
Net (MTD)	81	-68194
Net (YTD)	57009	NA

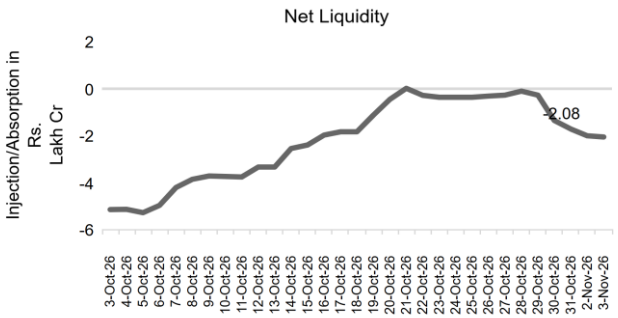
Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	5.54% (Sep'26)	4.38% (Jun'26)	1.44% (Sep'25)
WPI	11.39% (Sep'26)	9.97% (Jun'26)	-0.2% (Sep'25)
IIP	6.7% (Sep'26)	8.8% (Jun'26)	6.1% (Sep'25)
GDP	7.8% (Apr-Jun FY'27)	7.7% (Oct-Dec FY'26)	6.9% (Apr-Jun FY'26)
India Manufacturing PMI	54.7 (Oct-26)	53.5 (Jul-26)	59.2 (Oct-25)
India Service PMI	55.8 (Oct-26)	53.3 (Jul-26)	58.9 (Oct-25)

Bank Credit Growth*	18.2% (Oct 16, 2026)	19.4% (Sep 30, 2026)
Bank Deposit Growth*	16.7% (Oct 16, 2026)	17.8% (Sep 30, 2026)

Capital markets

- Bharat Heavy Electricals Limited (BHEL) secured orders worth around Rs 28,000 crore from Adani Power for four 2x800 MW thermal power projects.
- Essar Power plans to invest Rs 4,500 crore in a 300 MW firm and dispatchable renewable energy project in Andhra Pradesh, expanding its renewable energy portfolio.
- NHPC and Essar Renewables partnered on a $475 million renewable energy project in Andhra Pradesh.
- EloElo Group raised $80 million in a Series C funding round led by Hornbill Capital and NBCUniversal, to scale its AI-driven entertainment ecosystem and accelerate growth.
- Nooks raised $500 million in funding to support business expansion and product development.





Global market indices	04 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	53356.13	3.03	4.26	15.14	13.32
Nikkei 225	62188.63	-1.42	-8.96	21.79	20.76
FTSE	10829.21	1.79	3.51	6.41	11.47
Hang Seng	23919.50	1.67	-0.22	-3.50	-7.83
Taiwan	42948.91	-0.83	-11.40	35.39	52.75

Global debt	04 Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.89	4.95	5.28	4.63	4.31	4.09
UK 10-Year (%)	5.14	5.27	5.43	4.90	4.92	4.42
German 10-Year (%)	3.29	3.31	3.49	3.12	3.01	2.65
Japan 10-Year (%)	2.81	2.78	3.10	2.85	2.36	1.68

Domestic	04 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141622	2.94	-4.40	-3.48	17.61
Silver (Rs / Kg)	186133	5.50	-15.71	-19.12	27.36
Aluminium (Rs / Kg)	332	0.09	-2.70	-6.57	21.61
Copper (Rs / kg)	1377	-1.15	-2.62	17.56	37.65
Lead (Rs / kg)	198	-0.08	0.46	0.23	7.68
Zinc (Rs /Kg)	433	1.24	2.04	34.14	39.41
Nickel (Rs / kg)	1511	0.94	-4.27	-7.70	12.24

Global	04 Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3930.45	-0.74	-5.81	-13.19	-1.78
Silver (oz/$)	4973.00	-2.16	-18.29	-29.43	2.96
Brent Crude Futures	94.62	-8.67	-7.46	-20.05	46.83
NYMEX crude ($/bbl)	88.12	-8.29	-3.28	-13.08	45.51

Upcoming market indicators

Date	Indicator	Previous
Nov 5	Eurozone PPI, Sep	8.2%
Nov 6	US Unemployment Rate, Oct	4.2%
Nov 9	China Inflation Rate, Oct	0.9%
Nov 10	China Balance of Trade, Oct	$133.53B
Nov 12	UK GDP Growth Rate Prel Q3	1.4%

Global markets

- Wall Street stocks closed higher on Wednesday as US midterm elections results reduced political uncertainty and boosted risk appetite, despite concerns over tighter AI regulation.
- 10-year US bond yield ended lower at 4.89%, after the US midterm elections, as expectations of reduced fiscal spending and easing inflation pressures from lower oil prices.
- FTSE index closed higher on Wednesday, supported by gains in banking and precious metal mining stocks, as a weaker US dollar boosted investor sentiment
- Asian markets were trading mostly higher at 8.30 AM.
- US Trade deficit narrowed slightly to $105 billion in September 2026 from $105.7 billion in August.
- Eurozone inflation accelerated to 4.0% in October from 3.8% in September, while core inflation remained unchanged at 2.5%.
- Eurozone Services PMI was revised down to 51.4 in October from 53.0 in September, and Composite PMI declined to 51.7 from 53.1.

Commodity

- Crude oil prices fell by $7.97 to $88.12 per barrel on NYMEX as the US midterm elections reduced political uncertainty and fueled expectations of a potential easing in the conflict involving Iran, reducing concerns over oil supply disruptions.
- Domestic gold prices ended higher supported by weaker US dollar and increased 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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