

Indian Indices	Sep 30	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80268	-0.12	-3.99	-4.78	22.20
Nifty 50	24611	-0.10	-3.55	-4.65	21.76
BSE Mid cap	44916	0.04	-4.14	-8.99	31.91
Nifty Midcap	56529	-0.01	-5.38	-6.03	32.70
Nifty Smallcap	17563	0.08	-7.93	-8.43	30.33
BSE SmallCap	52195	0.00	-4.56	-8.64	31.71

Source: BSE, NSE

Indian Indices	Sep 30	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59255	0.30	10.77	-2.94
BSE Bankex	61513	0.22	-4.15	2.46
BSE CD	57694	-0.78	-3.50	-14.73
BSE CG	68290	0.01	-5.59	-6.59
BSE FMCG	20108	-0.39	-0.66	-15.47
BSE Healthcare	43076	-0.03	-2.67	-2.62
BSE IT	33185	-0.18	-12.95	-21.68
BSE Metal	33253	1.11	4.91	-3.92
BSE Oil & Gas	26910	-0.15	-3.43	-15.47
BSE Power	6715	-0.19	-3.21	-22.39
BSE Realty	6740	-0.79	-11.80	-21.56

Source: BSE, NSE

Global Indices	Sep 30	1D % Chg	3M % Chg	1Y % Chg
DJIA	46398	0.18	5.22	9.61
Nasdaq	22660	0.30	11.24	24.58
FTSE 100	9350	0.54	6.73	13.52
Nikkei 225	44933	-0.25	10.98	18.49
Hang Seng	26856	0.87	11.56	27.07

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 29	MF Inv Sep 26	DII Inv Sep 30
Buy	18667	14049	15957
Sell	20022	8720	10715
Net	-1355	5329	5243
Net (YTD)	-149168	394549	559167

Source: NSDL, NSE

Debt Market Indicators	Sep 30	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.00%
10 Yr Gilt^	6.57%	6.56%
91-day T-bill^	5.44%	5.49%
182-day T Bill^	5.53%	5.54%
364-day T Bill^	5.56%	5.58%
3-mth CP rate	6.57%	6.57%
6-mth CP rate	6.68%	6.68%
1-yr CP rate	6.88%	6.88%
3-mth CD rate	5.83%	5.93%
6-mth CD rate	6.09%	6.17%
12-mth CD rate	6.35%	6.40%
5 yr Corp Bond	7.00%	7.00%
Net LAF o/s (Rs Cr)*	-67278	-64675
M3 supply (Rs lakh Cr)**	284.77	283.08
G-sec Volume (Rs Cr)	42315	53545
SDF*	158209	155606
1 Year OIS	5.45%	5.47%
US 10-year Treasury Yield	4.16%	4.15%

\*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

\*\*Sep 5 and Aug 22 respectively

## Indian Equity

- Indian equity benchmarks closed lower on Tuesday due to selling in consumer, realty and IT stocks, amid persisting concerns over foreign capital outflow and US tariffs.
- The top losers were Interglobe Aviation, ITC, Bharti Airtel, Trent and Titan Company—down 1.01-1.97%.
- The top gainers were JSW Steel, UltraTech Cement, Adani Ports, Tata Motors and Hindalco—up 1.08-1.83%.

## Global Equity

- Wall Street stocks closed higher on Tuesday as optimism over continued Fed rate cuts outweighed concerns about a potential government shutdown.
- FTSE index closed higher on Tuesday, lifted by exporter earnings due to a weaker pound.
- Strait Times Index closed higher on Tuesday due to stock-specific gains.
- Nikkei Index closed lower on Tuesday as weak industrial and retail sales data for August triggered concerns over economic growth.
- Hang Seng Index closed higher on Tuesday as weak Chinese factory output data raised hopes of stimulus measures in China's 15th five-year plan.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call money rate ended flat at 5.00% on Tuesday.
- Government bond prices fell on Tuesday on concerns over policy rates, borrowing needs and weak demand.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.58% on Tuesday compared to 6.56% on Monday.

## Capital Market

- Ignosis successfully raised \$4 million in a funding round led by Peak XV Partners' Surge program.
- Vishvaraj Environment filed a draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (Sebi) for its maiden public issue and plans to raise Rs 2,250-cr via IPO.
- Virupaksha Organics has filed preliminary papers with capital markets regulator Sebi to raise Rs 740 crore through an initial public offering (IPO).
- Hiranandani Financial Services (HFS) raised Rs 800 crore from investment firm Vitruvian Partners.

## Regulatory

- The RBI raised the limit for perpetual debt that banks can raise overseas and use as part of their core capital.
- The Reserve Bank of India (RBI) approved Aga Khan Fund for Economic Development S.A (AKFED) to acquire 60,58,394 equity shares of DCB Bank through a preferential issue.
- The Reserve Bank constituted the six-member Payments Regulatory Board, which includes three central government nominees, to supervise the functioning of payment systems in the country.

## Economy and Government

- The Centre's fiscal deficit for April–August of FY26 widened to 38.1% of budget estimates (BE), or Rs 5.98 trillion compared to Rs 4.68 trillion in the previous period, according to data released by the Controller General of Accounts (CGA).
- The Asian Development Bank (ADB) lowered its growth forecast for FY27 by 20 basis points to 6.5%, stating that the steep tariff hikes by the US will affect exports and manufacturing growth.
- Indian Railway Finance Corporation (IRFC) inked two loan agreements worth Rs 16,489 crore with Maharashtra and Haryana state utilities to fund thermal power expansion projects.

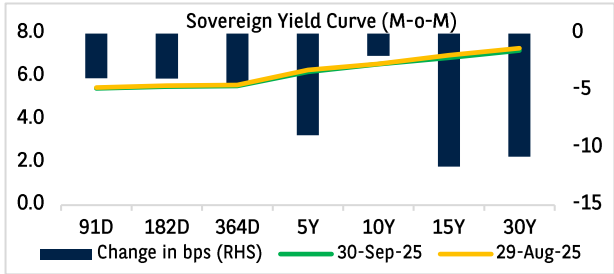
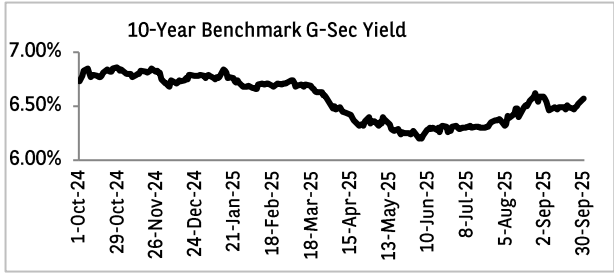
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	8,00,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.53	6.34	7.05	7.09	8.32	8.85
1-Yr	5.61	6.72	7.43	7.47	8.70	9.23
3-Yr	5.93	6.96	7.67	7.71	8.94	9.47
5-Yr	6.21	7.00	7.81	7.84	9.08	9.61
10-Yr	6.57	7.22	8.03	8.06	9.30	9.83

G-sec and corporate bonds data as of Sep 30

\* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.07% (Aug-25)	2.82% (May-25)	3.65% (Aug-24)
IIP	4.0% (Aug'25)	1.9% (May'25)	0.0% (Aug'24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Sep 30	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.03	67.97	66.74	71.77
NYMEX Crude Oil (\$/bbl)	62.37	63.45	65.11	68.17
Gold (Rs / 10 gm)#	115349	115454	95886	75197
# ibjarates spot prices				
Source: Financial Websites, IBIA				

Currencies Vs INR	Sep 30	Sep 29
USD	88.79	88.76
GBP	119.35	119.28
Euro	104.22	104.05
100 Yen	59.91	59.64
Forex Reserve (\$ bn)*	702.57	702.97
Dollar Index	97.82	97.91

\*Data pertains to Sep 19 and to Sep 12 respectively

Source: RBI, Financial Websites

International

- US House Price Index decreased to 2.3% in July 2025 compared to 2.7% in June 2025.
- US Chicago PMI fell to 40.6 in September 2025 compared to 41.5 in August 2025.
- US Job openings increased by 19,000 to 7.227 million in August 2025, compared to an upwardly revised 7.208 million reading in July 2025.
- The British economy grew 1.4% year-on-year in Q2 2025 compared to an upwardly revised 1.7% rise in Q1.
- Japan S&P Global Manufacturing PMI edged down to 48.5 in September 2025, compared to 49.7 in August 2025.
- Japan housing starts fell 9.8% in August 2025, compared to a drop 9.7% in July 2025.
- Japan Construction Orders increased 38.9% in August 2025 compared to a 19% decline in July 2025.

Commodities

- Crude oil prices fell by \$1.08 to \$62.37 a barrel on the NYMEX amid oversupply woes following expectations of higher OPEC+ output and the resumption of Iraqi exports.

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