

Indian Indices	Oct 1	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80983	0.89	-3.24	-3.90	22.40
Nifty 50	24836	0.92	-2.76	-3.72	21.96
BSE Mid cap	45325	0.91	-3.19	-8.40	32.20
Nifty Midcap	57030	0.89	-4.55	-5.51	32.98
Nifty Smallcap	17756	1.10	-6.82	-8.15	30.66
BSE SmallCap	52798	1.16	-3.29	-8.10	32.08

Source: BSE, NSE

Indian Indices	Oct 1	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59695	0.74	11.85	-2.52
BSE Bankex	62402	1.44	-2.70	3.83
BSE CD	57982	0.50	-3.43	-14.66
BSE CG	68759	0.69	-5.20	-5.91
BSE FMCG	20250	0.71	0.72	-14.73
BSE Healthcare	43564	1.13	-1.51	-1.55
BSE IT	33461	0.83	-12.01	-21.84
BSE Metal	33429	0.53	5.16	-3.47
BSE Oil & Gas	26946	0.13	-3.51	-14.76
BSE Power	6764	0.73	-2.10	-21.68
BSE Realty	6815	1.11	-10.62	-20.50

Source: BSE, NSE

Global Indices	Oct 2	1D % Chg	3M % Chg	1Y % Chg
DJIA	46520	0.17	4.58	10.25
Nasdaq	22844	0.39	12.02	27.44
FTSE 100	9428	-0.20	7.44	13.71
Nikkei 225	44937	0.87	13.01	18.85
Hang Seng	27287	1.61	12.66	21.58

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 30	MF Inv Sep 29	DII Inv Oct 1
Buy	18707	33998	14384
Sell	22733	30778	11522
Net	-4026	3220	2862
Net (YTD)	-153194	397769	562029

Source: NSDL, NSE

Debt Market Indicators	Oct 1	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.00%
10 Yr Gilt^	6.52%	6.57%
91-day T-bill^	5.44%	5.44%
182-day T Bill^	5.54%	5.53%
364-day T Bill^	5.54%	5.56%
3-mth CP rate	6.40%	6.57%
6-mth CP rate	6.70%	6.68%
1-yr CP rate	6.90%	6.88%
3-mth CD rate	5.75%	5.83%
6-mth CD rate	6.20%	6.09%
12-mth CD rate	6.40%	6.35%
5 yr Corp Bond	7.00%	7.00%
Net LAF o/s (Rs Cr)*	-90246	-67278
M3 supply (Rs lakh Cr)**	284.77	283.08
G-sec Volume (Rs Cr)	107155	42315
SDF*	175443	158209
1 Year OIS	5.44%	5.45%
US 10-year Treasury Yield ^	4.10%	4.16%

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

**Sep 5 and Aug 22 respectively ^Data as of oct 2

Indian Equity

- Indian equity benchmark indices closed higher on Wednesday, owing to a rally in banks and other financial stocks after the RBI kept the policy rates unchanged and allowed banks to fund mergers and acquisitions, eased lending against shares, and lowered risk weights for infrastructure financing.
- The top gainers were Tata Motors, Shriram Finance, Kotak Mahindra, Adani Enterprises and Trent, up 3.30% -5.61%.
- The top losers were Bajaj Finance, UltraTech Cement, SBI, Tata Steel, and Asian Paints, down 0.60-1.12%.

Global Equity

- Wall Street stocks closed higher on Thursday, lifted by gains in tech stocks despite weak labor data and the ongoing US government shutdown.
- FTSE index closed lower on Thursday, dragged down by healthcare and energy stocks.
- Strait Times Index ended higher on Thursday, due to stock specific gains.
- Nikkei Index ended higher on Thursday, buoyed by gains in chip related stocks.
- Hang Seng Index advanced on Thursday led by rally in tech stocks.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended flat at 5.00% on Wednesday.
- Government bond prices rose on Wednesday after the Reserve Bank of India held rates steady but signaled policy space for growth.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.52% on Wednesday compared to 6.58% on Tuesday.

Capital Market

- Runwal Developers filed a draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (Sebi) to raise Rs 2,000 crore through an initial public offering (IPO).
- Sterlite Electric filed draft papers with Sebi and plans to raise around Rs 1,500 crore through its initial public offering (IPO) to fund its growth plans and pare debts.
- Augmont Enterprises filed its Draft Red Herring Prospectus (DRHP) with market regulator Securities and Exchange Board of India (Sebi) worth Rs 800 crore.

Regulatory

- The RBI directed large banks to adopt the Expected Credit Loss framework and revised Basel III capital norms from April 1, 2027, with a glide path until 2031.
- RBI Governor Sanjay Malhotra said financial stability remains the central bank's top priority, even as it eases compliance and business norms to support growth.
- Reserve Bank of India (RBI) Governor Sanjay Malhotra clarified that the central bank is not considering imposing any charges on Unified Payments Interface (UPI) transactions.
- The Reserve Bank of India (RBI) raised the ceiling for taking loan against shares from the existing Rs 20 lakh to Rs 1 crore to improve the flow of credit.
- The Reserve Bank of India (RBI) proposed reforms in deposit insurance to incentivise sound risk management by banks.

Economy and Government

- The Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) voted unanimously to hold the repo rate at 5.50%
- The RBI projected India's real gross domestic product (GDP) growth for fiscal 2026 at 6.8%—with the second, third and fourth quarters at 7.0%, 6.4% and 6.2%, respectively—and 6.4% for the first quarter of fiscal 2027.
- According to government data India goods and services tax (GST) revenues rose 9.1% year-on-year to Rs 1.89 lakh crore in September.
- India HSBC India Manufacturing PMI edged down to 57.7 in September 2025 compared 59.3 in August 2025.

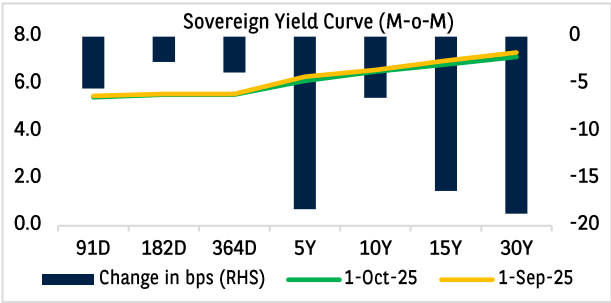
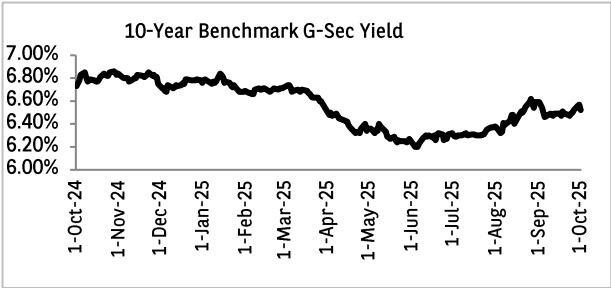
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	8,00,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.54	6.53	7.24	7.28	8.51	9.04
1-Yr	5.60	6.72	7.43	7.47	8.70	9.23
3-Yr	5.83	6.96	7.67	7.71	8.94	9.47
5-Yr	6.12	7.00	7.81	7.84	9.08	9.61
10-Yr	6.52	7.22	8.03	8.06	9.30	9.83

G-sec and corporate bonds data as of Oct 1

* 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	Oct 1	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)*	64.11	65.35	69.11	73.9
NYMEX Crude Oil (\$/bbl)*	60.48	61.78	67.45	70.1
Gold (Rs / 10 gm)#	117332	115349	97430	75515

ibjarates spot prices

Source: Financial Websites, IBJA *Data as of Oct 2

Currencies Vs INR	Oct 1	Sep 29
USD	88.68	88.79
GBP	119.49	119.35
Euro	104.36	104.22
100 Yen	60.23	59.91
Forex Reserve (\$ bn)*	702.57	702.97
Dollar Index^	97.87	97.71

*Data pertains to Sep 19 and to Sep 12 respectively

Source: RBI, Financial Websites ^Data as of Oct 2

International

- US ADP Employment Change rose to 32000 jobs in September 2025, compared to a revised loss of 3000 in August 2025.
- US-based employers announced 54,064 job cuts in September 2025, the least in three months, compared to 85,979 in August and down 25.8%.
- US S&P Global Manufacturing PMI eased to 52 in September 2025 compared to 53 in August 2025.
- US ISM Manufacturing PMI rose to 49.1 in September 2025, compared to 48.7 in August 2025.
- Eurozone HCOB Manufacturing PMI fell to 49.8 in September of 2025 compared to 50.7 in August 2025.
- Eurozone annual inflation rose to 2.2% in September 2025, compared to 2.0% in August 2025 while the annual core inflation rate 2.3%, unchanged from the previous month.
- Eurozone unemployment rate edged up to 6.3% in August 2025, compared to 6.2% in July 2025.
- UK Nationwide House Price Index rose 2.2% in September 2025 compared to a 2.1% increase in August 2025.
- UK S&P Global Manufacturing PMI dropped to 46.2 in September 2025 compared to 47.0 in August 2025.
- Japan S&P Global Services PMI rose to 53.3 in September 2025, compared to 53.1 in August 2025 while the S&P Global Composite PMI slipped 51.3 from 52.1.

Commodities

- Crude oil prices fell by \$1.30 to \$60.48 a barrel on the NYMEX as oversupply concerns weighed ahead of OPEC+ meeting.

Baroda BNP Paribas Asset Management India Pvt. Ltd.
(Formerly BNP Paribas Asset Management India Pvt. Ltd.),
Registered Office: Crescenzo, 2nd Floor, 201, Awing, G-Block, Bandra Kurla Complex, Mumbai - 400051
CIN: U74120MH2011PTC225365, Toll Free Number: 1800 - 2670 - 189 | Email: service@barodabnpparibasmf.in

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