

Indian Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83459	-0.62	3.01	5.94	22.77
Nifty 50	25598	-0.64	3.54	6.68	22.51
BSE Mid cap	47214	-0.26	3.41	3.36	32.98
Nifty Midcap	60037	-0.42	4.54	7.62	34.31
Nifty Smallcap	18361	-0.82	2.61	-0.35	31.65
BSE SmallCap	53882	-0.69	1.72	-1.50	33.18

Source: BSE, NSE

Indian Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59491	-0.77	11.91	10.92
BSE Bankex	65041	-0.44	5.25	11.56
BSE CD	60495	0.11	0.91	0.15
BSE CG	70386	-0.20	2.74	2.72
BSE FMCG	20502	-0.71	-0.71	-4.66
BSE Healthcare	44828	-0.46	0.99	2.22
BSE IT	34601	-1.06	-0.14	-14.50
BSE Metal	34764	-1.40	11.89	12.27
BSE Oil & Gas	28796	-0.41	9.06	6.63
BSE Power	6857	-0.99	2.74	-11.34
BSE Realty	7464	-0.83	5.32	-2.34

Source: BSE, NSE

Global Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg
DJIA	47085	-0.53	6.59	12.66
Nasdaq	23349	-2.04	10.90	28.43
FTSE 100	9715	0.14	6.43	18.70
Nikkei 225	51497	-1.74	27.81	35.33
Hang Seng	25952	-0.79	4.93	26.18

Source: Financial websites

Rs. Cr (Equity)	FII Inv Nov 3	MF Inv Oct 30	DII Inv Nov 4
Buy	10046	10356	15151
Sell	11979	9142	14109
Net	-1932	1214	1042
Net (YTD)	-146917	417407	612922

Source: NSDL, NSE

Debt Market Indicators	Nov 4	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.95%	5.00%
10 Yr Gilt^	6.53%	6.53%
91-day T-bill^	5.46%	5.46%
182-day T Bill^	5.55%	5.56%
364-day T Bill^	5.56%	5.56%
3-mth CP rate	6.52%	6.52%
6-mth CP rate	6.77%	6.77%
1-yr CP rate	6.94%	6.94%
3-mth CD rate	6.00%	6.00%
6-mth CD rate	6.24%	6.24%
12-mth CD rate	6.44%	6.44%
5 yr Corp Bond	6.89%	6.89%
Net LAF o/s (Rs Cr)*	-187516	-126567
M3 supply (Rs lakh Cr)**	287.15	288.95
G-sec Volume (Rs Cr)	51365	43595
SDF*	187516	126567
1 Year OIS	5.48%	5.47%
US 10-year Treasury Yield	4.10%	4.13%

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

**Oct 17 and Oct 3 respectively

Indian Equity

- Indian equity benchmarks closed lower on Tuesday, driven by losses in IT, auto and metal stocks and after top Federal Reserve officials pushed back against expectations of another interest rate cut in December.
- The top losers were Power Grid Corporation of India, Coal India, Eternal, TMPV and ONGC, down 2.02-3.11%.
- The top gainers were Titan Company, Bharti Airtel, Bajaj Finance, Mahindra & Mahindra and HDFC Life, up 0.88-2.39%.

Global Equity

- Wall Street stocks closed lower on Tuesday due to warnings from major banks about overvalued markets.
- FTSE index closed higher on Tuesday supported by healthcare stocks and a weaker pound.
- Strait Times Index closed lower on Tuesday due to stock-specific losses.
- Nikkei Index closed lower on Tuesday due to declines in Advantest and SoftBank group.
- Hang Seng Index closed lower on Tuesday as China-US summit de-escalated trade tensions.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call money rate ended lower at 4.95% on Tuesday compared to 5.00% on Monday.
- Government bond prices rose marginally on Tuesday on short covering and suspected RBI buying. However, gains were capped by supply concerns ahead of Friday's auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.52% on Tuesday compared to 6.53% on Monday.

Capital Market

- Adani Enterprises board has approved raising up to Rs 25,000 crore through a rights issue of partly paid-up equity shares with a face value of Re 1 each.
- AEL Industries has filed draft documents and plans to raise Rs 4,575 crore (\$520.51 million).
- Century Real Estate announced its latest mixed-use development project in East Bengaluru with a gross development value (GDV) of Rs 3,000 crore.
- Tata Steel signed an asset transfer agreement with Indian Metals & Ferro Alloys Ltd (IMFA) for the sale of its ferro alloy plant at Jajpur, Odisha, for a base consideration of Rs 610 crore.
- RITES secured an order worth Rs 372.68 crore from NIMHANS Bengaluru.

Regulatory

- The Reserve Bank of India has announced the premature redemption price for Sovereign Gold Bond (SGB) 2018-19 Series-I, set at Rs 12,039 per unit.
- The Securities and Exchange Board of India (Sebi) plans to update stockbroker regulations by December 2025 to enhance risk management and data protection.
- Sebi chairman Tuhin Kanta Pandey expressed his displeasure over "repeated" instances of breakdowns at exchanges.
- Securities and Exchange Board of India (Sebi) chairman Tuhin Kanta Pandey said the rise of algorithmic and high-frequency trading brings efficiency but also demands robust risk controls, real-time monitoring and compliance safeguards.

Economy and Government

- The government launched the third round of Production Linked Incentive (PLI) Scheme for speciality steel to attract investment in the sector, as part of its objective to boost domestic output and reduce imports.

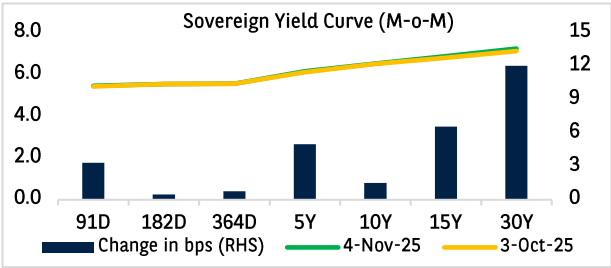
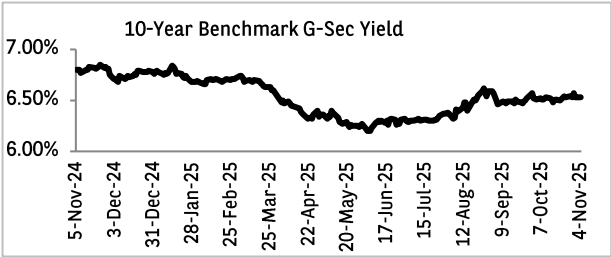
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	1,22,000	5,55,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	6.48	7.19	7.23	8.46	8.99
1-Yr	5.62	6.66	7.37	7.41	8.64	9.17
3-Yr	5.91	6.85	7.56	7.60	8.83	9.36
5-Yr	6.16	6.89	7.70	7.73	8.97	9.50
10-Yr	6.53	7.13	7.94	7.97	9.21	9.74

G-sec and corporate bonds data as of Nov 4

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	1.54% (Sep-25)	2.10% (Jun-25)	5.49% (Sep-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)	1,89,017 (Sep-25)	1,84,597 (Jun-25)	1,73,240 (Sep-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Nov 4	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	64.44	64.89	68.76	75.08
NYMEX Crude Oil (\$/bbl)	60.56	61.05	66.29	71.47
Gold (Rs / 10 gm)#	120419	120777	100167	78518
# ibjarates spot prices				

Source: Financial Websites, IBJA

Currencies Vs INR	Nov 4	Nov 3
USD	88.64	88.79
GBP	116.32	116.70
Euro	102.14	102.43
100 Yen	57.72	57.59
Forex Reserve (\$ bn)*	695.36	702.28
Dollar Index	100.14	99.87

*Data pertains to Oct 24 and to Oct 17 respectively

Source: RBI, Financial Websites

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