

Indian Indices	Oct 6	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81790	0.72	-1.97	0.12	22.62
Nifty 50	25078	0.74	-1.51	0.25	22.18
BSE Mid cap	45988	0.68	-1.76	-4.00	32.68
Nifty Midcap	58015	0.89	-2.79	-0.79	33.55
Nifty Smallcap	17928	0.28	-5.81	-4.43	30.96
BSE SmallCap	53271	-0.20	-2.84	-4.78	32.37

Source: BSE, NSE

Indian Indices	Oct 6	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59900	0.32	11.71	2.32
BSE Bankex	63432	1.10	-0.36	8.63
BSE CD	58638	-0.02	-4.07	-10.96
BSE CG	69564	0.15	-3.81	-1.05
BSE FMCG	20261	-0.19	0.42	-11.96
BSE Healthcare	43983	1.05	-2.03	0.96
BSE IT	34207	1.96	-10.73	-19.25
BSE Metal	33736	-0.92	5.90	-1.58
BSE Oil & Gas	27360	0.98	-3.51	-10.32
BSE Power	6799	-0.14	-0.71	-18.63
BSE Realty	6853	0.64	-9.12	-14.95

Source: BSE, NSE

Global Indices	Oct 6	1D % Chg	3M % Chg	1Y % Chg
DJIA	46695	-0.14	4.16	10.25
Nasdaq	22942	0.71	11.36	26.49
FTSE 100	9479	-0.13	7.44	14.47
Nikkei 225	47945	4.75	20.43	24.09
Hang Seng	26958	-0.67	12.72	18.56

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 3	MF Inv Oct 1	DII Inv Oct 6
Buy	18292	11376	15516
Sell	19876	8521	10634
Net	-1584	2855	4882
Net (YTD)	-154595	402483	567439

Source: NSDL, NSE

Debt Market Indicators	Oct 6	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.45%
10 Yr Gilt^	6.52%	6.51%
91-day T-bill^	5.43%	5.43%
182-day T Bill^	5.54%	5.55%
364-day T Bill^	5.55%	5.55%
3-mth CP rate	6.51%	6.53%
6-mth CP rate	6.67%	6.70%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.84%	5.85%
6-mth CD rate	6.19%	6.18%
12-mth CD rate	6.33%	6.35%
5 yr Corp Bond	6.93%	6.95%
Net LAF o/s (Rs Cr)*	-186491	-187917
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	54430	60905
SDF*	186491	195287
1 Year OIS	5.42%	5.70%
US 10-year Treasury Yield	4.18%	4.13%

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

**Sep 19 and Sep 5 respectively

Indian Equity

- Indian equity benchmarks closed higher on Monday, supported by banking and financial stocks following strong quarterly loan growth, while IT stocks gained ahead of earnings announcements for the second quarter of this fiscal.
- The top gainers were Max Healthcare, Shriram Finance, TCS, Apollo Hospital, and Tech Mahindra, rising 2.76-6.59%.
- The top losers were Tata Steel, Adani Ports, Power Grid Corporation of India, Eicher Motors and ITC, falling 0.88-1.82%.

Global Equity

- Wall Street stocks ended mixed on Monday with Nasdaq gaining as artificial intelligence-related dealmaking boosted rally in chip stocks while Dow Jones declined on concerns regarding a potential prolonged US government shutdown.
- FTSE index declined on Monday led by selloff in shares of Mondi following disappointing results and due to an unexpected resignation of France's new prime minister Sebastian Lecornu and his government.
- Strait Times Index closed higher on Monday tracking gains in specific stocks.
- Nikkei Index closed higher on Monday following the election results and weakness in the yen amid hopes of higher public spending measures.
- Hang Seng Index closed lower on Monday as the US government shutdown triggered global growth concerns.
- At 8.30 AM, Asian Markets were mostly trading mixed.

Indian Debt

- The interbank call money rate ended lower at 5.00% on Monday compared to 5.45% on Friday.
- Government bond prices declined marginally on Monday as earlier gains, due to lower-than-expected quarterly borrowing announced by states, were capped by profit booking.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Monday compared to 6.51% on Friday.

Capital Market

- Lenskart Solutions received approval from the Securities and Exchange Board of India (SEBI) to raise Rs 2,150 crore through an initial public offering (IPO).
- Mann Fleet Partners filed its draft papers with markets regulator Sebi to raise funds through an Initial Public Offering (IPO).
- Advit Jewels filed its Draft Red Herring Prospectus (DRHP) with Sebi for its proposed initial public offering (IPO).
- Tata Capital, LG Electronics to launch IPOs worth over Rs 27,000 cr.

Regulatory

- The Competition Commission of India (CCI), in its latest market study on artificial intelligence (AI), has called for responsible autonomy while urging enterprises to include self-audit of AI systems to address potential competition concerns.

Economy and Government

- India's HSBC services activity expanded for the twenty-sixth consecutive month in September, though the pace of growth eased to 60.9 from 62.9 in August while composite PMI eased to 61.0 from 63.2.
- Crisil said that gross non-performing assets (NPAs) of banks are likely to have bottomed out and are expected to remain in the 2.3-2.5% range by March 31, 2026. Bad loans had reached a historic low of 2.3% as of March 31, 2025.
- Government has begun early-stage talks with local insurers about designing a nationwide climate-linked insurance programme aimed at simplifying the payout process after extreme weather events such as heatwaves and floods.
- Tamil Nadu CM M.K. Stalin announced 20% bonus and ex-gratia for 'C' and 'D' category workers and employees in all state public sector undertakings (PSUs).
- Bihar Chief Minister Nitish Kumar inaugurated the first phase of the 3.6-km elevated stretch of the priority corridor of the Patna Metro rail project.

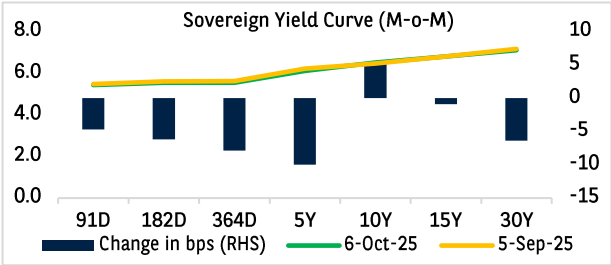
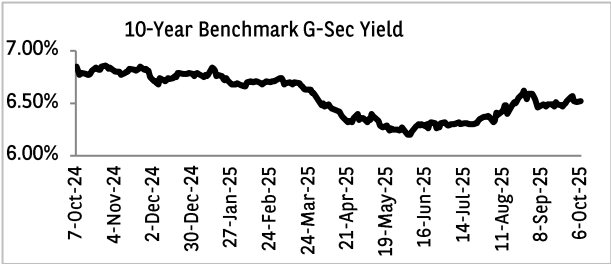
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	8,00,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.54	6.47	7.18	7.22	8.45	8.98
1-Yr	5.61	6.65	7.36	7.40	8.63	9.16
3-Yr	5.80	6.89	7.60	7.64	8.87	9.40
5-Yr	6.12	6.93	7.74	7.77	9.01	9.54
10-Yr	6.52	7.17	7.98	8.01	9.25	9.78

G-sec and corporate bonds data as of Oct 6

* 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 6	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.47	64.53	68.3	78.05
NYMEX Crude Oil (\$/bbl)	61.69	60.88	67	74.38
Gold (Rs / 10 gm)#	119249	116954	97021	75964

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Oct 6	Oct 3
USD	88.79	88.78
GBP	119.33	119.32
Euro	103.99	104.08
100 Yen	59.09	60.16
Forex Reserve (\$ bn)*	700.24	702.57
Dollar Index	98.11	97.72

*Data pertains to Sep 26 and to Sep 19 respectively

Source: RBI, Financial Websites

International

- Eurozone retail sales rose by 1.0% year-over-year in August 2025, easing from a 2.1% growth in the previous month.
- Eurozone S&P Global Construction PMI fell to 46 in September 2025, from 46.7 in the previous month.
- UK S&P Global Construction PMI rose to 46.2 in September 2025 from 45.5 in August.
- Japan household spending increased by 2.3% yoy in August accelerating from a 1.4% growth in the previous month.

Commodities

- Crude oil prices rose by 81 cents to \$61.69 a barrel on the NYMEX on easing oversupply woes after the OPEC+ production increase plans for November was more modest than expected.

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