

Indian Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81927	0.17	-1.82	1.08	22.66
Nifty 50	25108	0.12	-1.39	1.26	22.20
BSE Mid cap	46196	0.45	-1.17	-1.75	32.92
Nifty Midcap	58289	0.47	-2.06	1.73	33.71
Nifty Smallcap	17983	0.31	-5.10	-1.42	31.06
BSE SmallCap	53190	-0.15	-2.67	-1.71	33.19

Source: BSE, NSE

Indian Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60050	0.25	12.16	2.97
BSE Bankex	63332	-0.16	-0.38	10.78
BSE CD	58803	0.28	-3.68	-8.99
BSE CG	69522	-0.06	-3.44	1.06
BSE FMCG	20161	-0.49	-1.55	-11.75
BSE Healthcare	44058	0.17	-1.83	2.17
BSE IT	34121	-0.25	-10.37	-19.71
BSE Metal	33637	-0.29	6.23	0.38
BSE Oil & Gas	27489	0.47	-3.36	-7.70
BSE Power	6807	0.12	-0.90	-15.88
BSE Realty	6928	1.09	-8.18	-13.02

Source: BSE, NSE

Global Indices	Oct 7	1D % Chg	3M % Chg	1Y % Chg
DJIA	46603	-0.20	4.95	11.08
Nasdaq	22788	-0.67	11.64	27.14
FTSE 100	9484	0.05	7.69	14.21
Nikkei 225	47951	0.01	21.13	21.91
Hang Seng	Closed	NA	NA	NA

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 6	MF Inv Oct 2	DII Inv Oct 7
Buy	11218	11376	14572
Sell	12689	8521	13808
Net	-1472	2855	764
Net (YTD)	-156066	402483	568203

Source: NSDL, NSE

Debt Market Indicators	Oct 7	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.00%
10 Yr Gilt^	6.51%	6.52%
91-day T-bill^	5.41%	5.43%
182-day T Bill^	5.54%	5.54%
364-day T Bill^	5.55%	5.55%
3-mth CP rate	6.51%	6.51%
6-mth CP rate	6.67%	6.67%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.84%	5.84%
6-mth CD rate	6.19%	6.19%
12-mth CD rate	6.33%	6.33%
5 yr Corp Bond	6.90%	6.93%
Net LAF o/s (Rs Cr)*	-169737	-186491
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	62610	54430
SDF*	169737	186491
1 Year OIS	5.41%	5.42%
US 10-year Treasury Yield	4.14%	4.18%

\*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 Tuesday, led by gains in financial stocks amid optimism around the Reserve Bank of India's new lending reforms and expectations of upbeat corporate updates ahead of second quarter earnings.
- The top gainers were Bharti Airtel, Bajaj Auto, Jio Financial, Eicher Motors, and HCL Tech, up 1.11-1.36%.
- The top losers were Axis Bank, Tata Motors, TATA Consumer Products, Trent, and Adani Enterprises, down 1.22-2.14%.

## Global Equity

- Wall Street stocks ended lower on Tuesday after a consumer expectations survey from the New York Federal Reserve showed weakening future expectations and rising inflation projections.
- FTSE index ended flat on Tuesday as gains buoyed by rally in energy stocks were offset by selloffs in retailer's stocks.
- Strait Times Index closed higher on Tuesday due to a strong performance from DBS Bank.
- Nikkei Index closed flat on Tuesday with earlier gains due to a rally in chip and tech stocks cut by profit-booking.
- At 8.30 AM, Asian Markets were mostly trading lower.

## Indian Debt

- The interbank call money rate ended flat at 5.00% on Tuesday.
- Government bond prices ended higher on Tuesday on strong demand for state debt.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.51% on Tuesday compared to 6.52% on Monday.

## Capital Market

- Biocon gets USFDA's tentative approval for antibacterial drug Rifaximin.
- Sai Parenteral's files DRHP for IPO, aims to raise Rs 285-cr via fresh issue.
- Anantam Highways Trust raises Rs 180 cr as IPO.
- TrusTerra raises Rs 9 crore pre-seed led by Finvolve and India Accelerator.
- Solex Energy announced it had received NSE's approval to migrate equity shares from the NSE EMERGE Platform to the main board platform of NSE.

## Regulatory

- The Reserve Bank of India (RBI) will launch a pilot on deposit tokenisation on Wednesday.
- The National Payments Corporation of India (NPCI) has set up a new subsidiary, NPCI Tech Solutions Limited (NTSL), to drive experimentation and breakthrough innovations in the fintech sector.

## Economy and Government

- Prime Minister Narendra Modi will inaugurate the Navi Mumbai International Airport (NMIA) in Maharashtra.
- Finance Minister Nirmala Sitharaman launched a foreign currency settlement system in GIFT City.
- The Union Cabinet approved four major railway projects worth Rs 24,634 crore to boost capacity and connectivity across central India.
- Delhi government is set to prohibit property registrations in case outstanding property bills are not cleared.
- Tamil Nadu Chief Minister M K Stalin launches AeroDefCon 2025, TN eyes Rs 75,000 cr investment by 2032.
- The Maharashtra Cabinet approved a new gems and jewellery policy that targets to attract Rs 1 lakh crore investment and create five lakh employment opportunities in the key sector.

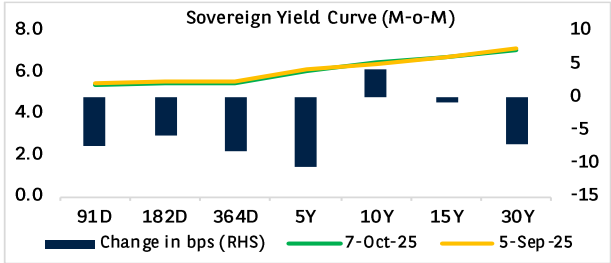
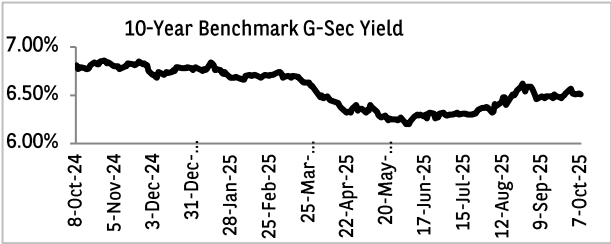
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	8,00,000	0

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	5.60	6.62	7.33	7.37	8.60	9.13
3-Yr	5.79	6.86	7.57	7.61	8.84	9.37
5-Yr	6.11	6.90	7.71	7.74	8.98	9.51
10-Yr	6.51	7.14	7.95	7.98	9.22	9.75

G-sec and corporate bonds data as of Oct 7

\* 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 7	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.45	65.47	69.58	80.93
NYMEX Crude Oil (\$/bbl)	61.73	61.69	67.93	77.14
Gold (Rs / 10 gm)#	119941	119249	96596	75933

# ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Oct 7	Oct 6
USD	88.73	88.79
GBP	119.38	119.33
Euro	103.71	103.99
100 Yen	58.90	59.09
Forex Reserve (\$ bn)*	700.24	702.57
Dollar Index	98.58	98.11

\*Data pertains to Sep 26 and to Sep 19 respectively

Source: RBI, Financial Websites

International

- US consumer inflation expectations for the year ahead rose to 3.4% in September 2025, the highest in five months, compared to 3.2% in August.
- UK Halifax House Price Index rose 1.3% on year in September, easing from a 2% gain in August.
- Japan's leading economic index rose to 107.4 in August 2025, up from July's 106.1.
- Japan's coincident economic index fell to 113.4 in August 2025 from 114.1 in the previous month.

Commodities

- Crude oil prices rose by 4 cents to \$61.73 a barrel on the NYMEX amid supply concerns.

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