Daily Market Connect

October 9, 2025

Baroda BNP PARIBAS MUTUAL FUND

Indian Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81774	-0.19	-2.32	0.17	22.62
Nifty 50	25046	-0.25	-1.87	0.13	22.15
BSE Mid cap	45852	-0.74	-1.92	-4.26	33.08
Nifty Midcap	57867	-0.73	-2.61	-1.14	33.47
Nifty Smallcap	17891	-0.52	-5.32	-3.91	30.90
BSE SmallCap	52967	-0.42	-2.92	-4.46	34.01

Source: BSE, NSE

Indian Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59242	-1.35	11.06	-0.09
BSE Bankex	63051	-0.44	-1.54	9.07
BSE CD	59022	0.37	-1.67	-9.30
BSE CG	68690	-1.20	-4.80	-2.89
BSE FMCG	20072	-0.44	-1.73	-12.75
BSE Healthcare	43883	-0.40	-1.42	-0.16
BSE IT	34634	1.50	-9.28	-18.95
BSE Metal	33560	-0.23	6.04	1.28
BSE Oil & Gas	27284	-0.75	-4.44	-9.53
BSE Power	6706	-1.49	-3.04	-19.11
BSE Realty	6798	-1.88	-10.87	-15.49

Source: BSE, NSE

Global Indices	Oct 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	46602	0.00	5.34	10.74
Nasdaq	23043	1.12	12.86	26.73
FTSE 100	9549	0.69	7.85	16.58
Nikkei 225	47735	-0.45	20.27	22.59
Hang Seng	26829	-0.48	11.10	28.21

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 7	MF Inv Oct 6	DII Inv Oct 8
Buy	12663	11478	10578
Sell	10999	8120	10821
Net	1664	3358	-243
Net (YTD)	-154403	405814	567959

Source: NSDL, NSE

Debt Market Indicators	Oct 8	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.95%	5.00%
10 Yr Gilt^	6.51%	6.51%
91-day T-bill^	5.41%	5.41%
182-day T Bill^	5.53%	5.54%
364-day T Bill^	5.53%	5.55%
3-mth CP rate	6.53%	6.51%
6-mth CP rate	6.67%	6.67%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.89%	5.84%
6-mth CD rate	6.20%	6.19%
12-mth CD rate	6.37%	6.33%
5 yr Corp Bond	6.90%	6.90%
Net LAF o/s (Rs Cr)*	-158517	-169737
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	60020	62610
SDF*	158517	169737
1 Year OIS	5.41%	5.41%
US 10-year Treasury Yield	4.13%	4.14%

**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 benchmark indices closed lower on Wednesday, as investors booked profits.
- The top losers were Tata Motors, M&M, Jio Financial, Bharat Electronics and UltraTech Cement, which fell 1.58-2.36%.
- The top gainers were Titan Company, Infosys, TCS, HCL Technologies, and Tech Mahindra, rising 1.34-4.31%.

Global Equity

- Wall Street stocks ended mixed on Wednesday with Nasdaq closing higher buoyed by rally in tech stocks while Dow Jones ended flat due to lack of economic data during the government shutdown.
- FTSE index ended higher on Wednesday buoyed by gains in financial stocks.
- Strait Times Index closed lower on Wednesday due to losses in specific stocks.
- Nikkei Index closed lower on Wednesday on profit booking following a recent really on expectations of a potential increase in government stimulus.
- Hang Seng Index closed lower on Wednesday amid fear that the artificial intelligence boom may have overheated.
- At 8.30 AM, Asian Markets were mostly trading mixed.

Indian Debt

- The interbank call money rate ended lower at 4.95% on Wednesday 5.00% on Tuesday.
- Government bond prices ended higher on Wednesday buoyed by states and central governments' reduced debt supply, and Reserve Bank of India's dovish stance.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.50% on Wednesday compared to 6.51% on Tuesday.

Capital Market

- Adani Enterprises will raise up to Rs 3,000 crore through the issue of non-convertible debentures.
- Anant Raj Ltd company's board approved a qualified institutional placement (QIP) of equity shares with a floor price of Rs 695.83.
- Venus Pipes & Tubes raised Rs 71.4 crore by converting 4.2 lakh warrants to support its expansion plans.
- Rubicon Research has mobilised Rs 619 crore from anchor investors, ahead of its initial share-sale opening for public subscription.

Regulatory

- The Reserve Bank of India launched a retail sandbox for its central bank digital currency (CBDC), enabling fintech firms to develop and test solutions for the ongoing pilot.
- The Securities and Exchange Board of India (Sebi) has revamped the block deal framework for both T+1 and optional T+0 settlement cycles.
- Chairman Tuhin Kanta Pandey said the Securities and Exchange Board of India (Sebi) has drawn up an action plan and capacity-building measures to ensure the quantum readiness of its regulated systems.

Economy and Government

- Prime Minister Narendra Modi inaugurated the final phase of Mumbai Metro Line-3, also known as the Aqua Line.
- Prime Minister Narendra Modi inaugurated Phase 1 of the Navi Mumbai International Airport (NMIA), constructed at a cost of approximately Rs 19,650 crore.
- The Ministry of Mines proposed relaxation in mineral auction rules by reducing the minimum number of technically qualified bidders required to proceed with block auctions in the first attempt from three to two.

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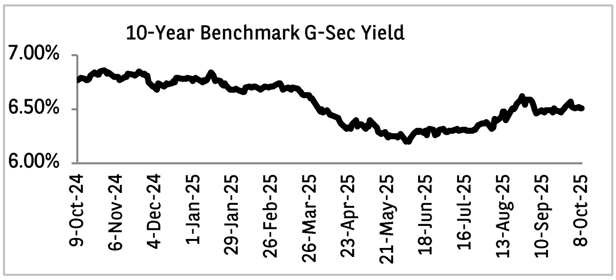
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	8,00,000	0

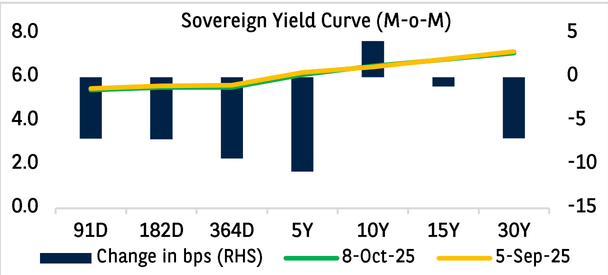
Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.53	6.48	7.19	7.23	8.46	8.99
1-Yr	5.58	6.62	7.33	7.37	8.60	9.13
3-Yr	5.78	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 8***

** Weighted average yields; Source: CRISIL*





International

- UK RICS house price balance rose4 points to -15 in September 2025, marking the first improvement in four months from -19% in August.
- Japan Economy Watchers Survey index increased to 47.1 in September 2025 compared to 46.7 in August 2025.
- Japan Economy Watchers Survey Outlook increased to 48.5 in September compared to 47.5 in August 2025.

Commodities

- Crude oil prices rose by 82 cents to $62.55 a barrel on the NYMEX after investors viewed stalled progress on a Ukraine peace deal as sustaining sanctions against Russia.

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 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	66.25	65.45	70.15	77.18
NYMEX Crude Oil ($/bbl)	62.55	61.73	68.33	73.57
Gold (Rs / 10 gm)#	122098	119941	96972	75726

 # ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Oct 8	Oct 7
USD	88.79	88.73
GBP	118.88	119.38
Euro	103.08	103.71
100 Yen	58.24	58.90
Forex Reserve ($ bn)*	700.24	702.57
Dollar Index	98.85	98.58

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

Source: RBI, Financial Websites

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