

Indian Indices	Oct 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82501	0.40	-0.83	1.09	22.82
Nifty 50	25285	0.41	-0.28	1.15	22.36
BSE Mid cap	46362	0.36	-0.50	-3.86	33.46
Nifty Midcap	58697	0.46	-0.78	-0.40	33.95
Nifty Smallcap	18133	0.74	-4.34	-4.06	31.31
BSE SmallCap	53379	0.59	-2.72	-5.28	34.31

Source: BSE, NSE

Indian Indices	Oct 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59626	0.49	11.49	-0.58
BSE Bankex	63873	0.97	0.18	8.95
BSE CD	59578	0.71	-0.76	-8.73
BSE CG	69553	0.47	-3.18	-2.73
BSE FMCG	20231	0.48	-1.22	-10.52
BSE Healthcare	44688	0.99	0.98	1.40
BSE IT	34985	0.00	-7.08	-17.83
BSE Metal	33991	-0.86	8.51	2.28
BSE Oil & Gas	27363	-0.13	-2.84	-8.69
BSE Power	6796	0.70	-1.79	-19.59
BSE Realty	6965	1.72	-8.00	-14.92

Source: BSE, NSE

Global Indices	Oct 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	45480	-1.90	1.86	7.13
Nasdaq	22204	-3.56	7.63	21.45
FTSE 100	9427	-0.86	5.03	14.44
Nikkei 225	48089	-1.01	21.29	22.11
Hang Seng	26290	-1.73	9.41	23.71

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 9	MF Inv Oct 8	DII Inv Oct 10
Buy	12396	8243	12168
Sell	9990	8973	10540
Net	2407	-730	1628
Net (YTD)	-151258	404118	570531

Source: NSDL, NSE

Debt Market Indicators	Oct 10	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.75%
10 Yr Gilt^	6.53%	6.52%
91-day T-bill^	5.43%	5.43%
182-day T Bill^	5.52%	5.52%
364-day T Bill^	5.55%	5.53%
3-mth CP rate	6.55%	6.53%
6-mth CP rate	6.72%	6.69%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.95%	5.95%
6-mth CD rate	6.19%	6.19%
12-mth CD rate	6.37%	6.37%
5 yr Corp Bond	6.90%	6.90%
Net LAF o/s (Rs Cr)*	-180659	-139538
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	62790	51695
SDF*	133799	139538
1 Year OIS	5.44%	5.42%
US 10-year Treasury Yield	4.05%	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 benchmarks closed higher on Friday, supported by gains in financial stocks amid prospects of foreign investors turning buyers and optimism ahead of quarterly earnings.
- The top gainers were Cipla, State Bank of India, Maruti Suzuki, Bajaj Auto and Dr Reddys Labs, up 1.47-3.22%.
- The top losers were Tata Steel, TCS, HDFC Life, Tech Mahindra, and JSW Steel, down 0.63-1.45%.

Global Equity

- Wall Street stocks closed lower on Friday US President announced 100% tariffs on Chinese imports and new export controls on US software, deepening trade tensions.
- FTSE index closed lower on Friday after US President warned of a 'massive increase' in tariffs on Chinese imports.
- Strait Times Index closed lower on Friday, tracking the decline in regional and US markets.
- Nikkei Index closed lower on Friday, as investors booked profits at higher levels.
- Hang Seng Index closed lower on Friday, led by a fall in tech company stocks over concerns that the artificial intelligence boom has pushed valuations to excessive levels.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call money rate ended lower at 5.00% on Friday compared to 5.75% on Thursday.
- Government bond prices ended flat on Friday after the auction and participants were looking for strong triggers to revive appetite.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.52% on Friday.

Capital Market

- Cholamandalam Investment and Finance Company invited bids to raise up to Rs 1,000 crore through secured non-convertible debentures (NCDs).
- Integris Medtech files DRHP with Sebi to raise Rs 3,500-4,000 crore via IPO.
- Bharti Telecom will launch \$1.7 billion mega bond issue next week.
- Andhra allots 6,000 acres to BPCL for Rs 96,000 cr refinery near port.
- Kolte-Patil acquires 7.5-acre land parcel with GDV of Rs 1,400 cr in Pune.
- Afcons Infrastructure bagged a contract for civil and allied infrastructure works of Rs 576 crore, including GST.
- Capacite Infraprojects received Rs 542-crore order from IIT Bombay.
- Truhome Finance secures Rs 417 cr fresh capital infusion from Warburg Pincus.

Regulatory

- The Reserve Bank of India (RBI) announced the consolidation of its existing regulatory instructions issued up to October 9, 2025, into 238 master circulars across 11 categories of regulated entities and covering 30 thematic areas.
- Sebi has streamlined the penalty framework for stockbrokers, removing 40 violations and reclassifying penalties for 105 violations as 'financial disincentives'.

Economy and Government

- UK-based business management platform Tide is significantly expanding its commitment to India with a £500 million investment over five years, starting in 2026.
- The government made it mandatory for importers of certain products which are exclusively used for solar energy projects to register on the renewable energy equipment import monitoring system.
- India plans to open up its electricity retail market for private companies, ending the dominance of state-run distributors in some states.

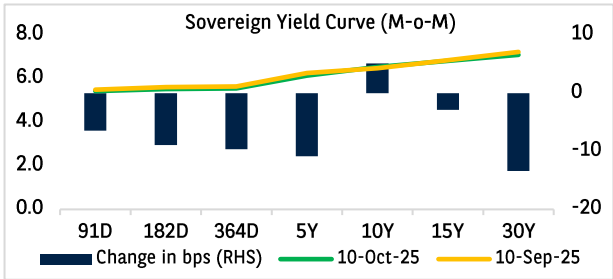
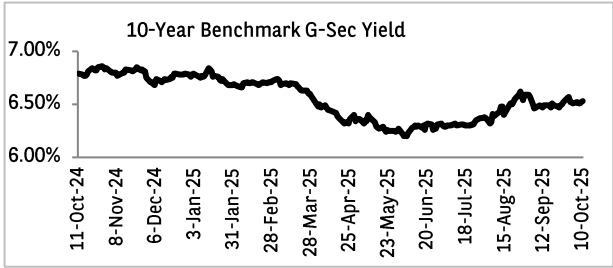
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	60,000	6,17,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.52	6.49	7.20	7.24	8.47	9.00
1-Yr	5.58	6.62	7.33	7.37	8.60	9.13
3-Yr	5.75	6.86	7.57	7.61	8.84	9.37
5-Yr	6.14	6.90	7.71	7.74	8.98	9.51
10-Yr	6.53	7.14	7.95	7.98	9.22	9.75

G-sec and corporate bonds data as of Oct 10

* 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 10	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	62.73	65.22	68.63	79.4
NYMEX Crude Oil (\$/bbl)	58.9	61.51	66.57	75.85
Gold (Rs / 10 gm)#	121525	122629	97046	74838

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Oct 10	Oct 9
USD	88.69	88.79
GBP	118.01	118.89
Euro	102.62	103.25
100 Yen	58.02	58.06
Forex Reserve (\$ bn)*	699.96	700.24
Dollar Index	98.85	99.54

*Data pertains to Oct 3 and to Sep 26 respectively

Source: RBI, Financial Websites

International

- US University of Michigan's inflation expectations eased for the second month to 4.6% in October 2025, from 4.7% in September.
- China's trade surplus came in at \$90.45 billion in September 2025 higher than the \$81.69 billion recorded in the same month a year earlier.
- Japan's producer prices rose 2.7% year-on-year in September 2025, keeping the same pace as in the previous month.

Commodities

- Crude oil prices fell by \$2.61 to \$58.90 a barrel on the NYMEX as US President's tariff threats against China fueled demand concerns.

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