Daily Market Connect

October 14, 2025

Baroda BNP PARIBAS MUTUAL FUND

Indian Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82327	-0.21	-0.21	1.16	22.77
Nifty 50	25227	-0.23	0.31	1.05	22.31
BSE Mid cap	46277	-0.18	-0.03	-4.46	33.40
Nifty Midcap	58762	0.11	0.20	-0.76	34.00
Nifty Smallcap	18102	-0.17	-3.53	-4.77	31.26
BSE SmallCap	53147	-0.43	-2.45	-6.10	34.15

Source: BSE, NSE

Indian Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59537	-0.15	13.27	-0.28
BSE Bankex	63944	0.11	0.54	9.75
BSE CD	59206	-0.62	-0.48	-9.75
BSE CG	68963	-0.85	-2.82	-3.66
BSE FMCG	20063	-0.83	-2.47	-11.28
BSE Healthcare	44666	-0.05	0.76	0.50
BSE IT	34672	-0.90	-6.36	-19.04
BSE Metal	33851	-0.41	8.43	0.60
BSE Oil & Gas	27311	-0.19	-1.77	-9.44
BSE Power	6797	0.01	-1.36	-19.28
BSE Realty	6967	0.02	-6.89	-14.27

Source: BSE, NSE

Global Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	46068	1.29	3.82	7.47
Nasdaq	22695	2.21	10.25	23.72
FTSE 100	9443	0.16	5.61	14.41
Nikkei 225	Closed	NA	NA	NA
Hang Seng	25889	-1.52	7.25	21.82

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 10	MF Inv Oct 8	DII Inv Oct 13
Buy	146	8243	14387
Sell	243	8973	12189
Net	-97	-730	2198
Net (YTD)	-151356	404118	572729

Source: NSDL, NSE

Debt Market Indicators	Oct 13	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.50%	5.00%
10 Yr Gilt^	6.52%	6.53%
91-day T-bill^	5.43%	5.43%
182-day T Bill^	5.52%	5.52%
364-day T Bill^	5.54%	5.55%
3-mth CP rate	6.55%	6.55%
6-mth CP rate	6.71%	6.72%
1-yr CP rate	6.90%	6.90%
3-mth CD rate	5.92%	5.95%
6-mth CD rate	6.18%	6.19%
12-mth CD rate	6.38%	6.37%
5 yr Corp Bond	6.90%	6.90%
Net LAF o/s (Rs Cr)*	-168915	-162222
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	58645	62790
SDF*	206844	133799
1 Year OIS	5.43%	5.44%
US 10-year Treasury Yield	4.05%	4.05%

**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 lower on Monday, weighed down by losses in IT shares as renewed trade tensions between the US and China dampened investor sentiments.
- The top losers were Tata Motors, Infosys, HUL, Wipro and Max Healthcare, down 1.13-2.68%.
- The top gainers were Adani Ports, Bajaj Auto, Bajaj Finance, Shriram Finance and Interglobe Aviation, up 0.92-2.11%.

Global Equity

- Wall Street stocks closed higher on Monday led by gains in chipmakers after the US President struck a conciliatory tone on US-China trade tensions.
- FTSE index closed higher on Monday boosted by gains in mining stocks after the US President toned down his trade rhetoric with China.
- Strait Times Index closed lower on Monday amid escalating trade tensions between US and China.
- Hang Seng Index closed lower on Monday, after the US government threatened to impose a 100% tariff on all Chinese imports and restrict exports of critical software from November 1.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended higher at 5.50% on Monday compared to 5.00% on Friday.
- Government bond prices ended flat on Monday after softer inflation data and lower than expected state debt supply.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.52% on Monday.

Capital Market

- Bharti Telecom plans to raise up to Rs 10,500 crore through the sale of bonds maturing in two years, and three years and two months.
- Aurobindo Pharma's promoter group raised around Rs 2,000 crore through a two-tranche promoter financing structure to fund platform acquisitions.
- SpeakX raised $16 million from WestBridge and pivots to an English-learning app.
- Welspun Enterprises Ltd. wins two contracts worth over Rs 10,000 crore.
- Lodha Developers acquired MMR land parcel for Rs 2,300 cr housing project.
- Foxconn plans to invest Rs 15,000 crore in Tamil Nadu, creating 14,000 skilled jobs.
- Advait Energy signed a Memorandum of Understanding (MoU) with the Government of Gujarat to promote investments under the Vibrant Gujarat Regional Conferences initiative.

Regulatory

- The Reserve Bank said banks in India and their overseas branches have been permitted to lend in Indian Rupees to persons resident in Bhutan, Nepal, and Sri Lanka to facilitate cross-border trade transactions.
- The board of retirement fund body EPFO approved liberalised part withdrawals for its more than seven crore subscribers, allowing up to 100 per cent EPF withdrawal.

Economy and Government

- India's consumer price inflation eased to 1.54% in September 2025, compared to 2.07% in August 2025.
- Fitch said the Reserve Bank of India's (RBI's) proposal to lower risk weights on financing operational infrastructure assets may help free up regulatory capital for Tata Capital Ltd (TCL).
- Data released by the Central Board of Direct Taxes said India's net direct tax collections grew 6.33% year-on-year to Rs 11.89 lakh crore in the April 1-October 12 period.
- The government opened the PM Gati Shakti portal to the private sector to help them optimise last-mile delivery services and develop infrastructure-based applications.

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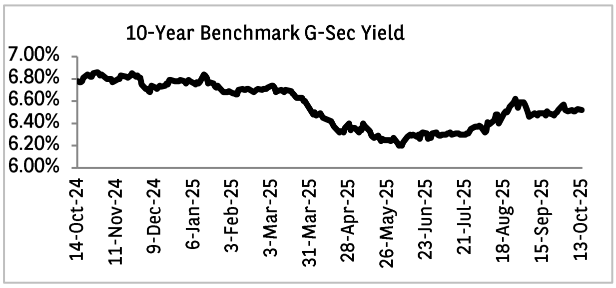
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	60,000	6,17,000

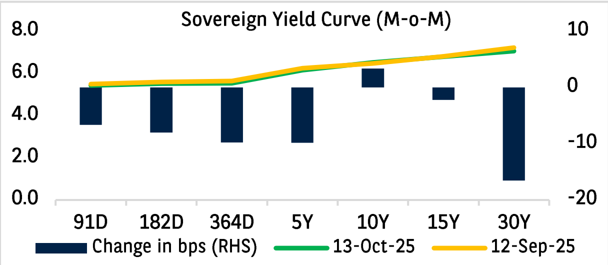
Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.52	6.49	7.20	7.24	8.47	9.00
1-Yr	5.59	6.63	7.34	7.38	8.61	9.14
3-Yr	5.76	6.86	7.57	7.61	8.84	9.37
5-Yr	6.16	6.90	7.71	7.74	8.98	9.51
10-Yr	6.52	7.14	7.95	7.98	9.22	9.75

*G-sec and corporate bonds data as of **Oct 13***

** Weighted average yields; Source: CRISIL*





International

- Salesforce plans to invest $15 billion in San Francisco over the next five years to support artificial intelligence innovation and workforce development in the city.

Commodities

- Crude oil prices rose by 59 cents to $59.49 a barrel on the NYMEX on hopes ahead of US-China meeting eased trade tensions.

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)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Oct 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	63.32	62.73	70.36	79.04
NYMEX Crude Oil ($/bbl)	59.49	58.9	68.45	75.56
Gold (Rs / 10 gm)#	124155	121525	97511	75623

 # ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Oct 13	Oct 10
USD	88.78	88.69
GBP	118.64	118.01
Euro	103.21	102.62
100 Yen	58.48	58.02
Forex Reserve ($ bn)*	699.96	700.24
Dollar Index	99.26	98.85

**Data pertains to Oct 3 and to Sep 26 respectively*

Source: RBI, Financial Websites

Baroda BNP Paribas Asset Management India Pvt. Ltd.
(Formerly BNP Paribas Asset Management India Pvt. Ltd.),
Registered Office: Crescenzo, 2nd Floor, 201, Awing, G-Block, Bandra Kurla Complex, Mumbai - 400051
CIN: U74120MH2011PTC225365, Toll Free Number: 1800 - 2670 - 189 | Email: service@barodabnpparibasmf.in