

Indian Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82605	0.70	0.04	0.96	22.85
Nifty 50	25324	0.71	0.51	1.06	22.39
BSE Mid cap	46425	1.07	-1.19	-4.66	33.50
Nifty Midcap	58970	1.11	-1.08	-1.05	34.19
Nifty Smallcap	18088	0.82	-5.47	-6.29	34.19
BSE SmallCap	53055	0.78	-4.09	-7.29	34.09

Source: BSE, NSE

Indian Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59587	0.23	11.38	0.31
BSE Bankex	63937	0.34	0.25	8.49
BSE CD	59238	1.20	-1.38	-10.69
BSE CG	69087	0.87	-3.25	-4.52
BSE FMCG	20161	1.00	-2.97	-11.60
BSE Healthcare	44470	0.18	-1.94	-0.62
BSE IT	34616	0.29	-6.03	-19.80
BSE Metal	33857	0.98	8.09	2.36
BSE Oil & Gas	27285	0.92	-2.54	-9.45
BSE Power	6836	1.05	-1.29	-18.80
BSE Realty	7111	3.06	-6.97	-15.56

Source: BSE, NSE

Global Indices	Oct 15	1D % Chg	3M % Chg	1Y % Chg
DJIA	46253	-0.04	5.07	8.22
Nasdaq	22670	0.66	9.63	23.77
FTSE 100	9425	-0.30	5.44	14.25
Nikkei 225	47673	1.76	20.15	19.45
Hang Seng	25911	1.84	5.37	27.52

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 14	MF Inv Oct 13	DII Inv Oct 15
Buy	11909	11045	15554
Sell	12486	11061	11062
Net	-577	-15	4492
Net (YTD)	-148377	405994	580245

Source: NSDL, NSE

Debt Market Indicators	Oct 15	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.40%
10 Yr Gilt^	6.48%	6.51%
91-day T-bill^	5.44%	5.43%
182-day T Bill^	5.51%	5.52%
364-day T Bill^	5.53%	5.55%
3-mth CP rate	6.49%	6.49%
6-mth CP rate	6.75%	6.71%
1-yr CP rate	6.94%	6.90%
3-mth CD rate	5.93%	5.93%
6-mth CD rate	6.18%	6.18%
12-mth CD rate	6.39%	6.38%
5 yr Corp Bond	6.88%	6.90%
Net LAF o/s (Rs Cr)*	-140996	-154542
M3 supply (Rs lakh Cr)**	283.49	284.77
G-sec Volume (Rs Cr)	90005	60840
SDF*	140996	154542
1 Year OIS	5.42%	5.42%
US 10-year Treasury Yield	4.05%	4.03%

*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 Wednesday on hopes of a rate cut by the US Federal Reserve and on optimism over earnings recovery.
- The top gainers were, Bajaj Finance, Nestle, Bajaj Finserv, Asian Paints and HDFC Life—up 2.37-4.0%.
- The top losers were Tata Motors, Bajaj Auto, Infosys, Tech Mahindra and Axis Bank—down 0.61-1.16%.

Global Equity

- Wall Street stocks closed mixed on Wednesday as Nasdaq advanced lifted by strong earnings while Dow Jones declined marginally amid lingering US-China trade tensions.
- FTSE index closed lower on Wednesday amid caution ahead of GDP data and lingering inflation worries.
- Strait Times Index closed higher on Wednesday on the back of gains in banking stocks.
- Nikkei Index closed higher on Wednesday, led by gains in tech stocks, due to renewed US-China trade tensions.
- Hang Seng Index closed higher on Wednesday on expectation of a rate cut by the Federal Reserve, despite concerns over the US-China trade war.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended lower at 5.00% on Wednesday compared to 5.40% on Tuesday.
- Government bond prices ended higher on Wednesday ahead of the release of RBI policy minutes with expectations of a dovish tone of policymakers.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.48% on Wednesday compared to 6.51% on Tuesday.

Capital Market

- IRB Infrastructure Developers-sponsored IRB InvIT Fund raised Rs 3,248.43 crore through an institutional placement, its first fundraising since the InvIT's initial public offering in 2017.
- Hyundai Motor's Indian arm plans to invest Rs 45,000 crore by FY30, aiming to make India its second-largest region globally.
- Power secured a Rs 2,500 crore order from Bharat Heavy Electricals Limited (BHEL).
- Godrej Properties acquired 26-acre land in Bengaluru for Rs 1,100 cr housing project.
- Saatvik Solar Industries secured order Rs 689.47 crore for solar PV module supply.
- Mishra Dhatu Nigam secured an order worth Rs 306 crore.
- Celcius to invest Rs 100 cr in 3.5-ton EV reefer fleet with Switch Mobility.

Regulatory

- Deputy governor at RBI said unmanaged risks from algorithmic decision-making, heavy reliance on data, and linked technologies can quickly spread from individual institutions to the financial system.
- According to the minutes of the monetary policy committee (MPC) meeting, Reserve Bank Governor Sanjay Malhotra opined that there is room for a further rate cut and indicated it would be done at an opportune time to have a desirable impact.

Economy and Government

- India's unemployment rate rose slightly to 5.2% in September 2025 compared to 5.1% in August.
- India's merchandise trade deficit surged to \$32.15 billion in September 2025, up from a revised \$24.42 billion a year earlier.
- Railway Minister Ashwini Vaishnaw announced the development of Vande Bharat 4.0, the next-generation semi-high-speed train, with a focus on export demand.

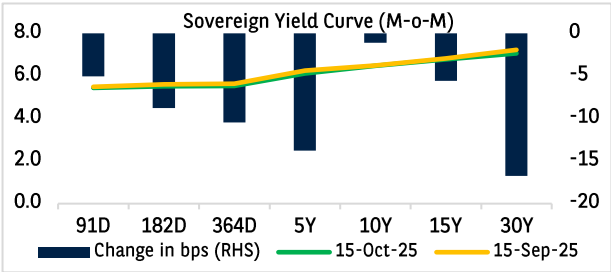
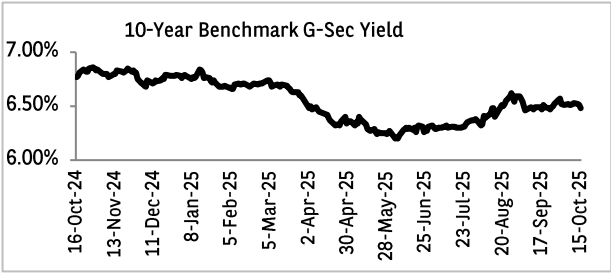
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	60,000	6,17,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.51	6.47	7.18	7.22	8.45	8.98
1-Yr	5.59	6.63	7.34	7.38	8.61	9.14
3-Yr	5.75	6.84	7.55	7.59	8.82	9.35
5-Yr	6.11	6.88	7.69	7.72	8.96	9.49
10-Yr	6.48	7.12	7.93	7.96	9.20	9.73

G-sec and corporate bonds data as of Oct 15

* Weighted average yields; Source: CRISIL



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 15	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	61.91	62.39	68.71	74.25
NYMEX Crude Oil (\$/bbl)	58.27	58.7	66.52	70.58
Gold (Rs / 10 gm)#	126714	126152	97916	75930
# ibjarates spot prices				
Source: Financial Websites, IBIA				

Currencies Vs INR	Oct 15	Oct 14
USD	88.29	88.79
GBP	117.99	118.08
Euro	102.66	102.80
100 Yen	58.45	58.50
Forex Reserve (\$ bn)*	699.96	700.24
Dollar Index	98.44	99.05

*Data pertains to Oct 3 and to Sep 26 respectively

Source: RBI, Financial Websites

International

- US NY Empire State Manufacturing Index rose 19.4 points to 10.7 in October 2025 compared to a 8.70 fall in September 2025.
- Eurozone industrial production grew 1.1% year-over-year in August 2025, compared to a revised 2.0% increase in July.
- China Outstanding loan growth slowed slightly to 6.6% year-on-year in September compared to 6.8% in August.
- Japan industrial production dropped 1.6% in August 2025, compared to a 0.4% fall in July 2025.
- Japan Machinery Orders in decreased to 1.6% in August compared to 4.9% in July.

Commodities

- Crude oil prices fell by 43 cents to \$58.27 a barrel on the NYMEX on demand concerns following escalating US-China trade tensions and after the IEA's forecast of a 2026 supply surplus.

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