

Indian Indices	Oct 18	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81225	0.27	-0.15	23.30	23.83
Nifty 50	24854	0.42	0.21	26.35	23.38
BSE Mid cap	47946	0.21	1.26	48.73	41.63
Nifty Midcap	58649	0.31	2.69	45.29	43.37
Nifty Smallcap	19078	0.06	1.32	46.63	36.03
BSE SmallCap	56500	-0.16	5.26	46.90	33.94

Source: BSE, NSE

Indian Indices	Oct 18	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57109	0.58	-1.48	52.29
BSE Bankex	59332	1.84	-2.08	20.19
BSE CD	64821	0.21	10.49	40.57
BSE CG	71821	0.00	-1.54	50.52
BSE FMCG	22268	-0.46	0.61	17.29
BSE Healthcare	44239	0.21	14.09	56.16
BSE IT	42391	-1.73	4.13	32.09
BSE Metal	33142	1.65	0.83	40.75
BSE Oil & Gas	29687	-0.13	-6.41	56.21
BSE Power	8317	0.46	5.00	83.99
BSE Realty	8189	0.39	-6.65	68.95

Source: BSE, NSE

Global Indices	Oct 18	1D % Chg	3M % Chg	1Y % Chg
DJIA	43276	0.09	6.42	28.55
Nasdaq	18490	0.63	3.46	38.87
FTSE 100	8358	-0.32	1.87	10.15
Nikkei 225	38982	0.18	-2.85	21.66
Hang Seng	20804	3.61	17.02	17.32

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Oct 17	MF Inv Oct 16	DII Inv Oct 18
Buy	10357	10674	13850
Sell	17660	8641	8635
Net	-7303	2033	5215
Net (YTD)	20813	326956	416239

Source: NSDL, NSE

Debt Market Indicators	Oct 18	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.50%	5.75%
10 Yr Gilt^	6.81%	6.78%
91-day T-bill^	6.44%	6.44%
182-day T Bill^	6.52%	6.52%
364-day T Bill^	6.54%	6.53%
3-mth CP rate	7.43%	7.43%
6-mth CP rate	7.70%	7.65%
1-yr CP rate	7.80%	7.75%
3-mth CD rate	7.19%	7.17%
6-mth CD rate	7.35%	7.35%
12-mth CD rate	7.50%	7.50%
5 yr Corp Bond	7.28%	7.27%
Net LAF o/s (Rs Cr)*	-188115	-202856
M3 supply (Rs lakh Cr)**	262.94	258.79
G-sec Volume (Rs Cr)	60645	41755
SDF*	82925	73858
1 Year OIS	6.53%	6.47%
US 10-year Treasury Yield	4.08%	4.09%

\*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

\*\* Oct 04 and Sep 20 respectively

## Indian Equity

- Indian equities ended higher on Friday led by gains in banking and metal stocks amid optimism over positive earnings results and slightly better-than-expected growth in China's third-quarter gross domestic product.
- The top gainers were Axis Bank, Wipro, Eicher Motors, ICICI Bank and Shriram Finance, up 2.64-5.74%.
- The top losers were Infosys, Asian Paints, Britannia, Nestle and HUL, down 0.79-4.50%.

## Global Equity

- Wall Street stocks ended higher on Friday, boosted by technology stocks and strong earnings from Netflix.
- FTSE index closed lower on Friday due to sharp selloff in British American Tobacco's settlement of Canadian lawsuit.
- Strait Times Index closed higher on Friday after China's growth numbers surpassed market expectations.
- Nikkei Index closed higher on Friday after Bank of Japan Governor Kazuo Ueda indicated no immediate plans to raise the interest rate and due to a weaker yen.
- Hang Seng Index closed higher on Friday on expectations of additional stimulus measures from the Chinese government. Central bank details on a stock buyback relending programme also boosted sentiment.
- At 8.30 AM in the morning, Asian Markets were trading higher.

## Indian Debt

- The interbank call money rate ended higher at 6.50% on Friday compared to 5.75% on Thursday.
- Government bond prices closed lower on Friday following the rise in US Treasury yields.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed higher at 6.82% on Friday compared to 6.78% on Thursday.

## Capital Market

- HDB Financial Services unit will raise up to Rs 12,500 crore (\$1.5 billion) in its initial public offering (IPO).
- Reliance Infrastructure approved the company's plan to raise Rs 6,000 cr through preferential issue of shares and qualified institutional placement (QIP) route.
- SMPP Ltd has filed preliminary papers with SEBI to raise Rs 4,000 crore through an initial public offering (IPO).
- Shapoorji Pallonji Group's infrastructure engineering and construction company Afcons Infrastructure Ltd (AIL) to launch its Rs 5,430-crore initial public offering (IPO) on October 25.

## Regulatory

- The Reserve Bank of India's (RBI) Governor Shaktikanta Das said an interest rate cut at this stage will be 'premature, and very, very risky'.
- SEBI clarified that investors can continue using 3-in-1 accounts to apply online for public issues of debt securities, non-convertible redeemable preference shares, municipal debt securities, and securitised debt instruments.
- The Insurance Regulatory and Development Authority of India (Irdai) issued an advisory to all insurance companies asking them to check their Information Technology (IT) systems for vulnerabilities and take steps to protect policyholders' data.

## Economy and Government

- India's forex reserves contracted by \$10.7 bn to \$690 bn as of October 11, with foreign currency assets reducing by \$10.5 billion to \$602 bn.
- The government sanctioned three pilot projects for using hydrogen in steel production to SAIL and two consortiums.
- Chief Minister Himanta Biswa Sarma announced the launch of CMAAA 2.0 to foster entrepreneurship in Assam.
- Oil minister Hardeep Singh Puri said India is expected to receive investments worth \$87 bn in the next decade to meet the nation's rising demand for petrochemicals.

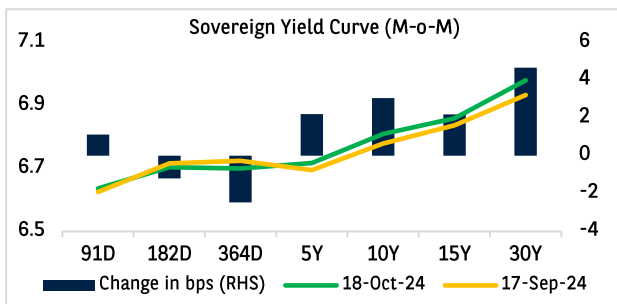
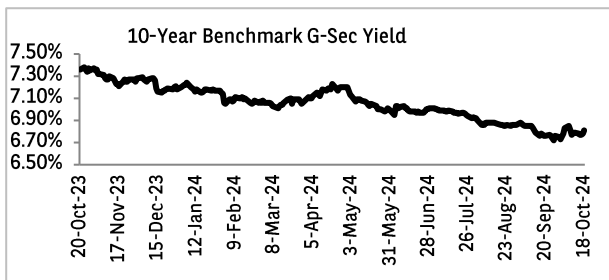
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	101,000	5,60,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.52	7.48	8.22	8.27	9.56	9.96
1-Yr	6.56	7.56	8.30	8.35	9.64	10.04
3-Yr	6.67	7.38	8.12	8.17	9.46	9.86
5-Yr	6.72	7.28	8.13	8.18	9.47	9.87
10-Yr	6.81	7.21	8.06	8.11	9.40	9.80

G-sec and corporate bonds data as of Oct 18

\* Weighted average yields; Source: CRISIL



## International

- US Building permits fell 2.9% to a seasonally adjusted annualized rate of 1.428 million in September, compared to a 4.6% rise in August.
- US Housing starts declined by 0.5% to an annualized seasonally adjusted rate of 1.354 million in September from a revised 7.8% rise in August.
- UK Retail Sales increased 3.9% in September, compared to a downwardly revised 2.3% rise in August.
- The People's Bank of China slashed key lending rates to new lows at the October meeting to support a weak economy. The 1-year loan prime rate (LPR) was cut by 25bps to 3.1% while the 5-year loan prime rate decreased to 3.60% in October from 3.85% in September.

## Commodities

- Crude oil prices fell \$1.45 to \$69.22 a barrel on the NYMEX due to concerns about slowing economic growth and a mixed geopolitical outlook in the Middle East adding uncertainty to supply and demand expectations.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Oct 18	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Oct 18	Oct 17
Monthly Inflation (CPI)	5.49% (Sep-24)	5.08% (Jun-24)	5.02% (Sep-23)	London Brent	73.06	74.45	85.11	91.5	USD	84.07	84.07
IIP	-0.1% (Aug-24)	5.9% (May-24)	10.9% (Aug-23)	Crude Oil (\$/bbl)	69.22	70.67	82.82	88.32	GBP	109.58	109.23
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	69.22	70.67	82.82	88.32	Euro	91.17	91.30
GST Collection (in Rs cr)	173,240 (Sep-24)	173,813 (Jun-24)	162,712 (Sep-23)	Gold (Rs / 10 gm)#	77410	76810	73979	59840	100 Yen	56.09	56.19
				# ibjargates spot prices					Forex Reserve (\$ bn)*	690.43	701.18
				Source: Financial Websites, IBJA					Dollar Index	103.49	103.83

Source: CRISIL, Mospil, Financial Websites

\*Data pertains to Oct 11 and to Oct 04 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@barodabnp-paribasmf.in](mailto:service@barodabnp-paribasmf.in)

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