

Indian Indices	Oct 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84212	-0.41	2.47	5.18	23.14
Nifty 50	25795	-0.37	2.92	5.72	22.67
BSE Mid cap	46595	-0.26	-0.14	0.99	33.27
Nifty Midcap	59231	-0.24	-0.13	5.11	34.62
Nifty Smallcap	18253	-0.21	-3.39	0.02	31.60
BSE SmallCap	53517	-0.19	-2.59	-0.24	34.44

Source: BSE, NSE

Indian Indices	Oct 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60409	-0.45	12.10	9.18
BSE Bankex	65090	-0.77	2.44	11.22
BSE CD	60783	-0.38	0.94	-3.37
BSE CG	69322	0.10	-1.57	2.03
BSE FMCG	20670	-0.71	1.51	-2.93
BSE Healthcare	44884	-0.75	-0.80	4.64
BSE IT	35261	-0.24	-1.20	-15.91
BSE Metal	34291	1.02	7.52	8.69
BSE Oil & Gas	27575	0.25	-0.13	-2.85
BSE Power	6829	-0.47	-0.58	-13.61
BSE Realty	7310	0.24	-1.85	-5.08

Source: BSE, NSE

Global Indices	Oct 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	47207	1.01	5.62	11.40
Nasdaq	23205	1.15	10.20	26.01
FTSE 100	9646	0.70	5.55	16.64
Nikkei 225	49300	1.35	17.87	29.25
Hang Seng	26160	0.74	1.92	27.68

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 23	MF Inv Oct 15	DII Inv Oct 24
Buy	21625	11999	11519
Sell	22422	8514	11646
Net	-797	3486	-128
Net (YTD)	-144679	411745	590497

Source: NSDL, NSE

Debt Market Indicators	Oct 24	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.72%	5.00%
10 Yr Gilt^	6.53%	6.54%
91-day T-bill^	5.45%	5.44%
182-day T Bill^	5.57%	5.54%
364-day T Bill^	5.54%	5.55%
3-mth CP rate	6.53%	6.52%
6-mth CP rate	6.79%	6.75%
1-yr CP rate	6.94%	6.94%
3-mth CD rate	6.05%	6.03%
6-mth CD rate	6.24%	6.24%
12-mth CD rate	6.43%	6.43%
5 yr Corp Bond	6.90%	6.90%
Net LAF o/s (Rs Cr)*	-8843	40767
M3 supply (Rs lakh Cr)**	288.95	283.49
G-sec Volume (Rs Cr)	47225	34505
SDF*	160431	122346
1 Year OIS	5.46%	5.47%
US 10-year Treasury Yield	4.02%	4.01%

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

**Oct 3 and Sep 19 respectively

Indian Equity

- Indian equity benchmarks closed lower on Friday due to profit booking despite positive global cues and steady foreign fund inflows.
- The top losers were Cipla, HUL, Max Healthcare, UltraTech Cement and Kotak Mahindra, down 1.73% - 3.69%.
- The top gainers were Hindalco, Bharti Airtel, ONGC, ICICI Bank and Shriram Finance, up 0.82-4.04%.

Global Equity

- Wall Street stocks ended higher on Friday after a cooler-than-expected inflation report lifted investor optimism over Fed rate cut.
- FTSE index ended higher on Friday after data showed an unexpected increase in UK retail sales in September.
- Strait Times Index closed higher on Friday due to the upcoming meeting between the US President Donald Trump and China's President Xi Jinping, sparking hope for easing trade tensions.
- Nikkei Index closed higher on Friday, driven by tech stocks.
- Hang Seng Index closed higher on Friday as investors went long on tech stocks with the hope of easing trade tension between China and the US during the upcoming meeting between the nation's leaders.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended higher at 5.72% on Friday compared to 5.00% on Thursday.
- Government bond prices ended flat on Friday amid caution over the interest rate outlook.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.54% on Friday.

Capital Market

- Federal Bank's Board approved the sale of a 9.99% stake to a Blackstone affiliate for Rs. 6,196.5 crore through preferential equity shares and warrants.
- Lenskart Solutions is planning launch its initial public offering (IPO) on October 31, aiming to raise Rs 2,150 crore through a fresh issue of shares.
- Uniphore raised \$260 million in a Series F funding round that saw participation from Nvidia, AMD, Snowflake, and Databricks, alongside financial and sovereign investors.

Regulatory

- The Reserve Bank of India (RBI) released a draft circular proposing limits on banks' exposure to capital markets and acquisition finance, aimed at strengthening financial stability and promoting prudent lending practices.
- The Reserve Bank of India (RBI) has proposed reducing the risk weight on high-quality infrastructure projects financed by non-banking financial companies (NBFCs).
- The Securities and Exchange Board of India (Sebi) allowed the transfer of Portfolio Management Services (PMS) business by one portfolio manager to another, after seeking prior approval from the regulator.

Economy and Government

- India HSBC Flash Manufacturing PMI rose to 58.4 in October 2025 compared to 57.7 in September 2025 while the HSBC Flash Services PMI fell to 58.8 from 60.9 and the HSBC Flash Composite PMI fell to 59.9 from 61.0.
- The International Monetary Fund (IMF) has predicted that India will continue to be one of the fastest growing 'emerging market and developing economies' in 2025-26, growing at a rate of 6.6%.
- The World Bank approved a \$280 million loan for a health system programme in Kerala to improve the life expectancy and quality of life for 11 million elderly and vulnerable people.

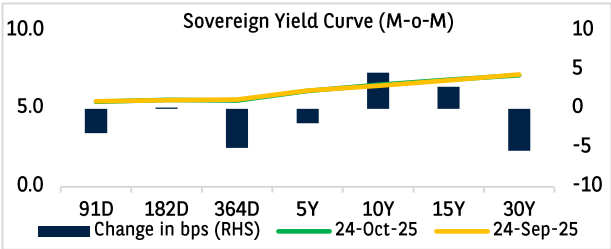
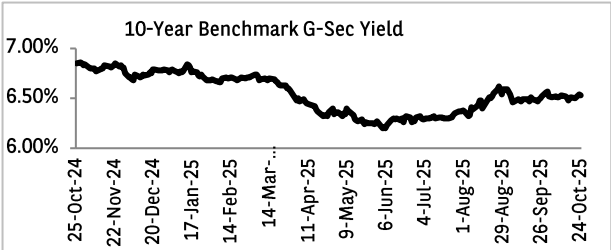
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	90,000	5,87,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.57	6.52	7.23	7.27	8.50	9.03
1-Yr	5.59	6.67	7.38	7.42	8.65	9.18
3-Yr	5.75	6.86	7.57	7.61	8.84	9.37
5-Yr	6.15	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 24

* 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 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.94	65.99	69.18	74.67
NYMEX Crude Oil (\$/bbl)	61.5	61.79	66.03	70.19
Gold (Rs / 10 gm)#	121518	123354	98880	78246

ibjарates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Oct 24	Oct 23
USD	87.71	87.95
GBP	116.85	117.39
Euro	101.79	101.98
100 Yen	57.33	57.65
Forex Reserve (\$ bn)*	702.28	697.78
Dollar Index	98.95	98.94

*Data pertains to Oct 17 and to Oct 10 respectively

Source: RBI, Financial Websites

International

- US annual inflation rate rose to 3% in September 2025, compared to 2.9% in August 2025 while the annual core consumer inflation rate ticked down to 3% from 3.1%.
- Eurozone HCOB Flash Manufacturing PMI rose to 50 in October 2025 compared to 49.8 in September 2025 while the HCOB Flash Services PMI rose to 52.6 from 51.3 and the HCOB Flash Composite PMI rose to 52.2 from 51.2.
- UK S&P Global Flash Manufacturing PMI rose to 49.6 in October 2025, compared to 46.2 in September 2025 while the S&P Global Flash Services PMI rose to 51.1 from 50.8 and the S&P Global Flash Composite PMI rose to 51.1 from 50.1.
- UK Retail sales jumped 1.5% year-on-year in September 2025, compared to a 0.7% increase in August 2025.
- China industrial profits increased by 3.2% on year to CNY 5.37 trillion in the first nine months of 2025, picking up from a 0.9% growth in the prior period.

Commodities

- Crude oil prices fell by 29 cents to \$61.50 a barrel on the NYMEX amid doubts over US sanctions on Russian oil firms.

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