

Indian Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80005	0.76	-1.63	25.43	23.28
Nifty 50	24339	0.65	-2.00	27.78	22.74
BSE Mid cap	45766	0.69	-4.07	47.10	40.09
Nifty Midcap	55737	0.83	-3.52	44.02	40.31
Nifty Smallcap	18062	1.20	-4.20	42.91	34.35
BSE SmallCap	52916	1.11	-2.54	43.45	32.14

Source: BSE, NSE

Indian Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54557	0.80	-7.90	48.58
BSE Bankex	58384	0.71	-0.43	20.76
BSE CD	61394	0.34	1.98	39.37
BSE CG	66423	-0.01	-9.50	45.13
BSE FMCG	21558	0.74	-5.00	16.15
BSE Healthcare	43416	1.36	8.06	59.15
BSE IT	41976	0.60	0.33	35.11
BSE Metal	31236	1.21	-3.18	40.05
BSE Oil & Gas	27581	0.27	-13.44	52.75
BSE Power	7768	0.34	-4.52	76.35
BSE Realty	7720	1.40	-8.25	67.02

Source: BSE, NSE

Global Indices	Oct 28	1D % Chg	3M % Chg	1Y % Chg
DJIA	42388	0.65	4.43	30.75
Nasdaq	18567	0.26	6.97	46.86
FTSE 100	8286	0.45	0.00	13.64
Nikkei 225	38606	1.82	2.49	24.57
Hang Seng	20599	0.04	21.02	18.40

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Oct 25	MF Inv Oct 25	DII Inv Oct 28
Buy	15578	9322	12258
Sell	18606	6250	10857
Net	-3027	3073	1401
Net (YTD)	9696	354889	440554

Source: NSDL, NSE

Debt Market Indicators	Oct 28	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.25%	5.95%
10 Yr Gilt^	6.86%	6.85%
91-day T-bill^	6.51%	6.50%
182-day T Bill^	6.59%	6.58%
364-day T Bill^	6.59%	6.58%
3-mth CP rate	7.50%	7.50%
6-mth CP rate	7.75%	7.80%
1-yr CP rate	7.85%	7.90%
3-mth CD rate	7.22%	7.19%
6-mth CD rate	7.40%	7.40%
12-mth CD rate	7.50%	7.50%
5 yr Corp Bond	7.32%	7.32%
Net LAF o/s (Rs Cr)*	-75192	-71630
M3 supply (Rs lakh Cr)**	262.94	258.79
G-sec Volume (Rs Cr)	39985	40485
SDF*	83664	80102
1 Year OIS	6.59%	6.57%
US 10-year Treasury Yield	4.28%	4.25%

\*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 Monday, supported by gains in banking stocks, drop in crude oil prices and rally in some Asian markets, spurred by political developments in Japan.
- The top gainers were Shriram Finance, Adani Enterprises, ICICI Bank, Eicher Motors and Wipro, up 2.79-5.39%.
- The top losers were Coal India, Bajaj Auto, Axis Bank, Kotak Mahindra and Hero MotoCorp, down 0.91-4.22%.

## Global Equity

- Wall Street stocks ended higher on Monday on stable energy supplies and ahead of release of the major earnings, upcoming US presidential elections.
- FTSE index ended higher on Monday driven by gains in travel, leisure, aerospace and defense stocks.
- Straits Times index ended lower on Monday on stock-specific declines.
- Nikkei 225 index closed higher on Monday led by gains in exporters' stocks due to a sharp fall in the yen on the back of the Liberal Democratic Party's worst parliamentary defeat since 2009.
- Hang Seng index ended flat on Monday, as losses due to weak Chinese industry profit data were cut short by expectations of more stimulus measures from the Chinese government.
- At 8.30 AM in the morning, Asian Markets were trading higher.

## Indian Debt

- The interbank call money rate ended higher at 6.25% on Monday compared to 5.95% on Friday.
- Government bond prices closed lower on Monday due to a rise in US treasury yields.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed higher at 6.87% on Monday compared to 6.85% on Friday.

## Capital Market

- NTPC Green Energy, a wholly owned subsidiary of NTPC, has been issued final observation by SEBI, allowing them to raise Rs 10,000 crore through an initial public offering (IPO).
- Udaan closed a debt-financing round of about Rs 300 crore from Lighthouse Canton, Stride Ventures, InnoVen Capital, and Trifecta Capital.
- Slice completed its merger with North East Small Finance Bank (NESFB) with effect from October 27 after receiving all requisite shareholder and regulatory approvals.

## Regulatory

- The Reserve Bank said an entity seeking authorisation or recognition as a Central Counterparty (CCP) should have a minimum networth of Rs 300 cr at the time of submitting its application.
- SEBI proposed broadening its guidelines on shared contact details by allowing non-individual clients, such as HUFs, partnerships, trusts, and corporates, to use the same mobile number or email address under exceptional circumstances.

## Economy and Government

- India and Spain signed several memorandums of understanding (MOUs) during the bilateral meeting between Prime Minister Narendra Modi and his Spanish counterpart Pedro Sanchez.
- The government's monthly economic report said geopolitical conflicts and uncertainty about the trade policies of major economies are among the biggest risks for India's economy, maintaining the current growth forecast.
- The Finance Ministry in its Monthly Economic Review said Moderation in urban demand amid softening consumer sentiments and limited footfall due to above-normal rainfall need watching, along with anecdotal reports of Artificial Intelligence displacing workers that are beginning to emerge.

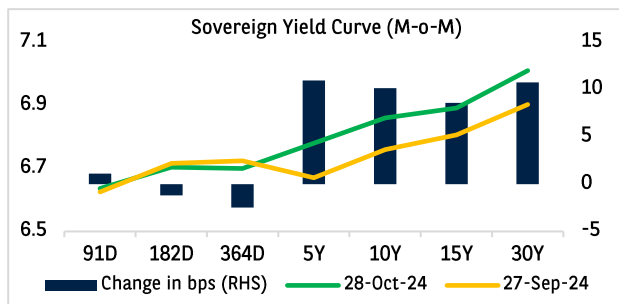
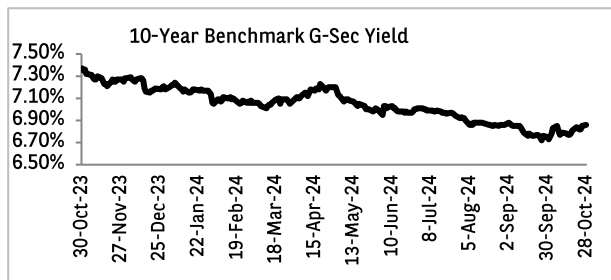
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	1,55,000	5,06,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.59	7.53	8.27	8.32	9.61	10.01
1-Yr	6.66	7.57	8.31	8.36	9.65	10.05
3-Yr	6.76	7.37	8.11	8.16	9.45	9.85
5-Yr	6.78	7.32	8.17	8.22	9.51	9.91
10-Yr	6.86	7.22	8.07	8.12	9.41	9.81

G-sec and corporate bonds data as of Oct 28

\* Weighted average yields; Source: CRISIL



## International

- US Dallas Fed Manufacturing Index came in at -3 in October 2024, up from -9 in the prior month.
- Japan unemployment rate fell to 2.4% in September, compared with August's reading of 2.5%.

## Commodities

- Crude oil prices fell \$4.40 cents to \$67.38 a barrel on the NYMEX after geopolitical tensions failed to affect oil supplies.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Oct 28	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Oct 28	Oct 25
Monthly Inflation (CPI)	5.49% (Sep-24)	5.08% (Jun-24)	5.02% (Sep-23)	London Brent	71.42	76.05	81.13	90.48	USD	84.07	84.08
IIP	-0.1% (Aug-24)	5.9% (May-24)	10.9% (Aug-23)	Crude Oil (\$/bbl)	67.38	71.78	77.16	85.54	GBP	109.07	109.14
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	67.38	71.78	77.16	85.54	Euro	90.91	91.01
GST Collection (in Rs cr)	173,240 (Sep-24)	173,813 (Jun-24)	162,712 (Sep-23)	Gold (Rs / 10 gm)#	78245	78015	68131	60825	100 Yen	55.00	55.31
				# ibjارات spot prices					Forex Reserve (\$ bn)*	688.27	690.43
				Source: Financial Websites, IBJA					Dollar Index	104.26	104.26

Source: CRISIL, Mospi, Financial Websites

\*Data pertains to Oct 18 and to Oct 11 respectively

Source: RBI, Financial Websites

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