

Indian Indices	Oct 29	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80369	0.45	-1.21	26.00	23.40
Nifty 50	24467	0.52	-1.49	28.45	23.02
BSE Mid cap	46104	0.74	-4.13	48.18	40.13
Nifty Midcap	56251	0.92	-3.62	45.35	42.86
Nifty Smallcap	18199	0.76	-4.43	43.99	34.60
BSE SmallCap	53290	0.71	-2.98	44.46	32.26

Source: BSE, NSE

Indian Indices	Oct 29	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53728	-1.52	-9.84	46.33
BSE Bankex	59669	2.20	1.71	23.42
BSE CD	61977	0.95	3.32	40.70
BSE CG	67272	1.28	-10.78	46.99
BSE FMCG	21578	0.09	-4.67	16.26
BSE Healthcare	43211	-0.47	7.32	58.40
BSE IT	41766	-0.50	0.14	34.43
BSE Metal	31375	0.45	-2.91	40.67
BSE Oil & Gas	27631	0.18	-14.28	53.03
BSE Power	7852	1.08	-4.22	78.25
BSE Realty	7832	1.46	-8.29	69.46

Source: BSE, NSE

Global Indices	Oct 29	1D % Chg	3M % Chg	1Y % Chg
DJIA	42233	-0.36	4.18	30.28
Nasdaq	18713	0.78	7.73	48.01
FTSE 100	8220	-0.80	-0.88	12.73
Nikkei 225	38904	0.77	1.13	25.53
Hang Seng	20701	0.49	20.09	18.98

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Oct 28	MF Inv Oct 28	DII Inv Oct 29
Buy	14100	12037	12824
Sell	16209	8784	12094
Net	-2109	3253	730
Net (YTD)	7587	355070	441284

Source: NSDL, NSE

Debt Market Indicators	Oct 29	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.50%	6.25%
10 Yr Gilt^	6.85%	6.86%
91-day T-bill^	6.53%	6.51%
182-day T Bill^	6.59%	6.59%
364-day T Bill^	6.59%	6.59%
3-mth CP rate	7.52%	7.50%
6-mth CP rate	7.75%	7.75%
1-yr CP rate	7.85%	7.85%
3-mth CD rate	7.20%	7.22%
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)*	-95328	-75192
M3 supply (Rs lakh Cr)**	262.94	258.79
G-sec Volume (Rs Cr)	42215	39985
SDF*	103800	83664
1 Year OIS	6.54%	6.59%
US 10-year Treasury Yield	4.28%	4.28%

\*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 Tuesday supported by gains in banking and financial stocks.
- The top gainers were SBI, Bharat Electricals, Eicher Motors, SBI Life Insurance and HDFC Life, up 3.36-5.13%.
- The top losers were Tata Motors, Maruti Suzuki, Hero MotoCorp, Dr Reddy's Labs and Cipla, down 1.70-4.06%.

## Global Equity

- Wall Street stocks ended mixed on Tuesday as Nasdaq gained boosted by the technology sector while Dow Jones dipped as investors reviewed the earnings report and awaited Alphabet's post market results.
- FTSE index ended lower on Tuesday led by losses in the energy sector while investors awaited the upcoming budget announcement.
- Strait Times Index ended higher on Tuesday as investors awaited key data releases from the United States.
- Nikkei Index closed higher on Tuesday on optimism about strong corporate earnings and potential fiscal stimulus.
- Hang Seng Index ended higher on Tuesday as strong earnings from HSBC Holdings and Wuxi AppTec boosted confidence in corporate outlook.
- At 8.30 AM in the morning, Asian Markets were trading lower.

## Indian Debt

- The interbank call money rate ended higher at 6.50% on Tuesday compared to 6.25% on Monday.
- Government bond prices closed marginally higher on Tuesday due to a short covering at a lower level.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed lower at 6.86% on Tuesday compared to 6.87% on Monday.

## Capital Market

- Swiggy filed for an Rs 11,300 crore Initial Public Offering (IPO) with India's Securities and Exchange Board of India (Sebi).
- Aegis Vopak Terminals (AVTL) approved a preferential issue up to an amount aggregating to Rs 800 crore on a private placement basis, as well as an initial public offering (IPO) worth around Rs 4,000 crore.
- Zinc raised \$25.5 million in seed funding, led by Nexus Venture Partners, with participation from Quona Capital, EDBI, Global Ventures, and Saison Capital.
- Finova Capital, raised \$135 mn in a Series E funding round from investors including Avataar Venture Partners, Sofina, Madison India Capital, and Norwest Venture Partners.

## Regulatory

- The Telecom Regulatory Authority of India (Trai) extended the deadline for implementing a traceability requirement on commercial messages, including one-time passwords (OTPs), to December 1, 2024.

## Economy and Government

- According to the latest data released by the Reserve Bank of India (RBI), the domestic holding of gold reserves increased to 60% of total holdings as of September 30, up from 50% at the end of March.
- Prime Minister Narendra Modi virtually inaugurated and laid foundation stones for several health projects in Madhya Pradesh including medical colleges and AIIMS' new administrative block in Bhopal.
- Prime Minister Narendra Modi asserted that the government is working to create a system that gives opportunity to every youngster and allows the youth to fulfil their aspirations.
- Prime Minister Narendra Modi extended the Ayushman Bharat health insurance scheme (AB PM-JAY) to all senior citizens aged 70 years and above, aiming to bolster India's healthcare infrastructure.

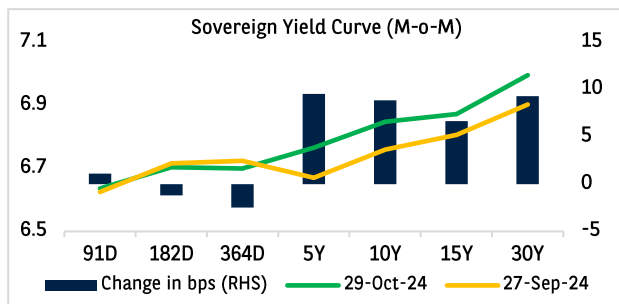
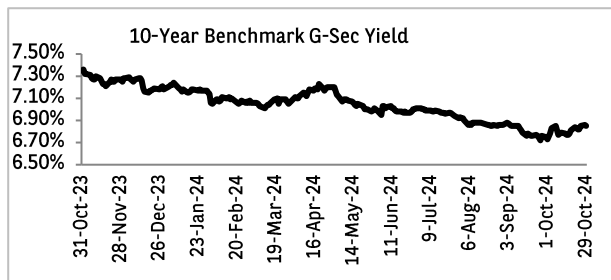
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	1,55,000	5,06,000

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	6.64	7.57	8.31	8.36	9.65	10.05
3-Yr	6.75	7.37	8.11	8.16	9.45	9.85
5-Yr	6.77	7.32	8.17	8.22	9.51	9.91
10-Yr	6.85	7.22	8.07	8.12	9.41	9.81

G-sec and corporate bonds data as of Oct 29

\* Weighted average yields; Source: CRISIL



## International

- US JOLTs Job Openings fell by 418,000 to 7.443 mn in September, from a downwardly revised 7.861 mn in August.
- US Case Shiller Home Price Index increased 5.2% on year in August compared to a 5.9% rise in July.
- US House Price Index increased 4.2% in August compared to revised 4.7% in July.
- US CB Consumer Confidence rose to 108.7 in October, from a revised 99.2 in September.
- US Dallas Fed Services Index rose to 2 in October, from -2.6 in the previous month.

## Commodities

- Crude oil prices fell 17 cents to \$67.21 a barrel on the NYMEX on easing supply concerns amid resolving geopolitical tensions.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Oct 29	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Oct 29	Oct 28
Monthly Inflation (CPI)	5.49% (Sep-24)	5.08% (Jun-24)	5.02% (Sep-23)	London Brent	71.12	71.42	79.78	90.48	USD	84.07	84.07
IIP	-0.1% (Aug-24)	5.9% (May-24)	10.9% (Aug-23)	Crude Oil (\$/bbl)	67.21	67.38	75.81	85.54	GBP	109.13	109.07
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	67.21	67.38	75.81	85.54	Euro	90.96	90.91
GST Collection (in Rs cr)	173,240 (Sep-24)	173,813 (Jun-24)	162,712 (Sep-23)	Gold (Rs / 10 gm)#	78745	78245	68800	60825	100 Yen	54.80	55.00
				# ibjarates spot prices					Forex Reserve (\$ bn)*	688.27	690.43
				Source: Financial Websites, IBJA					Dollar Index	104.23	104.32

Source: CRISIL, Mospi, Financial Websites

\*Data pertains to Oct 18 and to Oct 11 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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