

Indian Indices	Oct 30	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84404	-0.70	3.59	5.58	23.19
Nifty 50	25878	-0.68	4.12	6.31	22.77
BSE Mid cap	47306	0.00	2.61	2.57	33.03
Nifty Midcap	60096	-0.09	3.72	6.67	35.09
Nifty Smallcap	18470	-0.10	1.72	0.43	31.93
BSE SmallCap	54092	-0.06	0.39	-0.03	34.51

Source: BSE, NSE

Indian Indices	Oct 30	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59921	-0.41	12.87	11.61
BSE Bankex	65298	-0.72	4.93	10.58
BSE CD	60992	-0.17	1.76	-0.39
BSE CG	70120	0.14	2.08	3.64
BSE FMCG	20710	-0.48	1.85	-4.93
BSE Healthcare	44868	-0.45	-2.17	4.07
BSE IT	35169	-0.52	0.39	-15.23
BSE Metal	35537	-0.48	13.70	13.65
BSE Oil & Gas	28572	0.17	5.06	4.04
BSE Power	6998	-0.19	3.83	-10.46
BSE Realty	7387	0.04	3.80	-5.61

Source: BSE, NSE

Global Indices	Oct 30	1D % Chg	3M % Chg	1Y % Chg
DJIA	47522	-0.23	6.88	12.77
Nasdaq	23581	-1.57	11.60	26.73
FTSE 100	9760	0.04	6.82	19.61
Nikkei 225	51326	0.04	26.25	30.67
Hang Seng	26283	-0.24	4.39	28.96

Source: Financial websites

Rs. Cr (Equity)	FII Inv Oct 29	MF Inv Oct 27	DII Inv Oct 30
Buy	12595	7695	13847
Sell	13375	5715	11269
Net	-780	1980	2578
Net (YTD)	-134845	419824	601716

Source: NSDL, NSE

Debt Market Indicators	Oct 30	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.45%	5.40%
10 Yr Gilt^	6.57%	6.53%
91-day T-bill^	5.46%	5.46%
182-day T Bill^	5.57%	5.58%
364-day T Bill^	5.56%	5.57%
3-mth CP rate	6.55%	6.58%
6-mth CP rate	6.79%	6.79%
1-yr CP rate	6.94%	6.94%
3-mth CD rate	6.04%	6.02%
6-mth CD rate	6.23%	6.23%
12-mth CD rate	6.44%	6.40%
5 yr Corp Bond	6.90%	6.90%
Net LAF o/s (Rs Cr)*	-26723	-3903
M3 supply (Rs lakh Cr)**	288.95	283.49
G-sec Volume (Rs Cr)	42640	34155
SDF*	85235	129424
1 Year OIS	5.48%	5.47%
US 10-year Treasury Yield	4.11%	4.08%

*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 Thursday, on US-China trade tensions and concerns over the Fed pausing further rate cuts after the expected cut.
- The top losers were Dr Reddy's Labs, Cipla, HDFC Life, Bharti Airtel and Interglobe Aviation, down 1.51-3.89%.
- The top gainers were, Coal India, Larsen & Toubro, Bharat Electronics, Hindalco Industries and Nestle, up 0.54-1.49%.

Global Equity

- Wall Street stocks declined on Thursday after Fed Chair Jerome Powell, in his post-policy remarks said that a cut in December is not a foregone conclusion and weak earnings results from tech companies.
- FTSE index ended flat on Thursday due to mixed set of earning results.
- Strait Times Index closed lower on Thursday, as investors turned cautious after Powell's hawkish statement.
- Nikkei Index closed higher on Thursday, boosted by gains in technology stocks.
- Hang Seng Index closed lower on Thursday, dragged down by concerns over the outcome of the US-China meeting and Powell's hawkish comment.
- At 8.30 AM, Asian Markets were mostly trading mixed.

Indian Debt

- The interbank call money rate ended higher at 5.45% on Thursday compared to 5.40% on Wednesday.
- Government bond prices ended lower on Thursday after hawkish by US Fed comments dampening rate cut hopes and on tight banking system liquidity concerns in domestic market.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.57% on Thursday compared to 6.54% on Wednesday.

Capital Market

- IntrCity SmartBus raised Rs 250 crore in a Series D round led by venture capital firm A91 Partners.
- Snabbit raised \$30 mn Series C to expand into child, elder and cooking care.
- Fambo raised Rs 21.55 crore from AgriSURE Fund and EV2 Ventures to grow its business.
- Bending Spoons raised \$710 million in a funding round which gave the company a pre-money valuation of \$11 billion.
- MEIL Energy Private Limited announced the acquisition of 100% stake in TAQA Neyveli Power Company Private Ltd from Abu Dhabi National Energy Company PJSC.

Regulatory

- Deputy Governor T Rabi Sankar said the Reserve Bank of India (RBI) will continue to take a measured approach in developing its Central Bank Digital Currency (CBDC), prioritising careful assessment over speed, even as it maintains a firm position against private cryptocurrencies.
- Sebi decided to extend the timeline for Qualified Stock Brokers (QSBs) for putting in place the necessary systems for implementation of optional T+0 settlement cycle.

Economy and Government

- The government plans to introduce a new Seed Law during the upcoming budget session of Parliament in early 2026.
- Commerce and Industry Minister Piyush Goyal reiterated the need to focus on diversification of the export market, considering the current volatile geopolitical environment and the higher tariffs imposed by Washington on several Indian products.
- Uttar Pradesh (UP) approved 38 private logistics and warehousing projects worth Rs 2,600 crore in multiple cities.

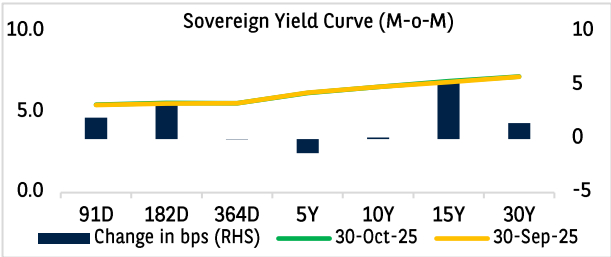
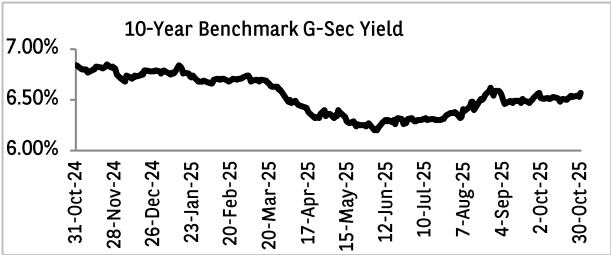
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,77,000	90,000	5,87,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.57	6.50	7.21	7.25	8.48	9.01
1-Yr	5.65	6.67	7.38	7.42	8.65	9.18
3-Yr	5.78	6.86	7.57	7.61	8.84	9.37
5-Yr	6.19	6.90	7.71	7.74	8.98	9.51
10-Yr	6.57	7.14	7.95	7.98	9.22	9.75

G-sec and corporate bonds data as of Oct 30

* 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)	1,89,017 (Sep-25)	1,84,597 (Jun-25)	1,73,240 (Sep-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Oct 30	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65	64.92	73.24	72.55
NYMEX Crude Oil (\$/bbl)	60.57	60.48	70	68.61
Gold (Rs / 10 gm)#	119619	120628	99017	78745

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Oct 30	Oct 29
USD	88.60	88.28
GBP	116.98	116.87
Euro	102.98	102.68
100 Yen	57.76	57.99
Forex Reserve (\$ bn)*	702.28	697.78
Dollar Index	99.53	99.22

*Data pertains to Oct 17 and to Oct 10 respectively

Source: RBI, Financial Websites

International

- The Eurozone economy grew 1.3% year-over-year in Q3 2025, compared to 1.5% in Q2 2025.
- The European Central Bank left interest rates unchanged for a third consecutive meeting in October, signaling confidence in a resilient eurozone economy and easing inflation pressures. The main refinancing rate remained at 2.15%, while the deposit facility rate stayed at 2.0%.
- Eurozone Economic Sentiment Indicator rose to 96.8 in October 2025, compared to 95.6 in September 2025 while the Industrial Sentiment rose to -8.2 compared to -10.1 and services sentiment rose to 4.0 from the upwardly revised 3.7.
- Eurozone Consumer Inflation Expectations decreased to 21.9 points in October compared to 24 points in September 2025.
- Eurozone consumer confidence rose to -14.2 in October 2025, compared to -14.9 in September.
- Eurozone unemployment rate stood at 6.3% in September 2025 unchanged from August 2025.
- China's official NBS Manufacturing PMI eased to 49.0 in October 2025, down from 49.8 in September while non-manufacturing PMI rose to 50.1 from 50 and composite PMI eased to 50 from 50.6.
- The Bank of Japan kept its benchmark short-term rate unchanged at 0.5% in October 2025, maintaining borrowing costs at their highest level since 2008.
- Japan's retail sales unexpectedly rose 0.5% year-on-year in September 2025, rebounding from a downwardly revised 0.9% decline in the previous month.
- Japan's industrial production increased 3.40% on year in September of 2025 from -1.6% in the previous month.

Commodities

- Crude oil prices rose by 9 cents to \$60.57 a barrel on the NYMEX on demand hopes amid potential trade agreement between US-China.

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