

Broad Indices	Oct 9	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	72472	1.23	-5.56	-11.80	19.22
Nifty 50	22520	1.30	-6.02	-10.57	19.27
BSE Mid cap	45197	1.07	-5.06	-2.17	NA
Nifty Midcap 100	58787	1.56	-1.23	0.61	27.73

Sectoral Indices	Oct 9	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	55146	0.84	-6.48	-7.06
BSE Bankex	62159	1.00	-4.06	-1.74
BSE CD	57153	0.80	-7.11	-3.39
BSE CG	73292	0.46	-5.99	5.87
BSE FMCG	17056	2.02	-7.26	-15.29
BSE Healthcare	48828	0.66	-1.95	10.34
BSE IT	27407	2.91	2.74	-21.66
BSE Metal	37979	0.94	-5.51	10.77
BSE Oil & Gas	24158	0.24	-7.14	-11.83
BSE Power	6986	0.65	-9.81	3.52
BSE Realty	6280	0.77	-11.36	-8.29

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Apollo Hospitals	4.72	BSE	-1.43
ITC	4.31	RIL	-0.65
Eicher Motors	4.17	JSW STEEL	-0.61
TCS	3.85	CIPLA	-0.44
HCL Tech	3.38	NA	NA

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 8	MF Inv Oct 6	DII Inv Oct 9
Buy	16107	4340	15627
Sell	28991	2859	10883
Net	-12884	1481	4743
Net (YTD)	-302205	439450	672338

Policy rates	Oct 9	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.25	5.25	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00
Overnight rates	Oct 9	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.20	5.10	5.34
10 Yr Gilt(%)^	7.30	7.20	6.96	6.75
TREP (%)	5.95	5.04	4.39	4.99
Short-term debt	Oct 9	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.10	7.00	6.70	7.00
6-month CPs (%)	7.70	7.60	6.86	7.27
3-month CDs (%)	6.40	6.10	5.90	6.70
6-month CDs (%)	7.15	7.16	6.45	6.85
182-day T-bill (%)^	6.08	5.94	5.57	5.46
364-day T-bill (%)^	6.17	6.11	5.87	5.61
Long-term debt	Oct 9	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.82	6.74	6.31	6.20
5-Y G-sec (%)	7.11	7.03	6.63	6.43
10-Y G-sec (%)	7.30	7.20	6.96	6.75

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Friday, helped by easing geopolitical concerns after United States President Trump ruled out immediate strikes on Iran.
- The top gainers were Apollo Hospital, ITC, Eicher Motors, TCS and HCL Technologies, up 3.38-4.72%.
- The top losers were BSE, Reliance, JSW Steel and Cipla, down 0.44-1.43%.

Indian Debt

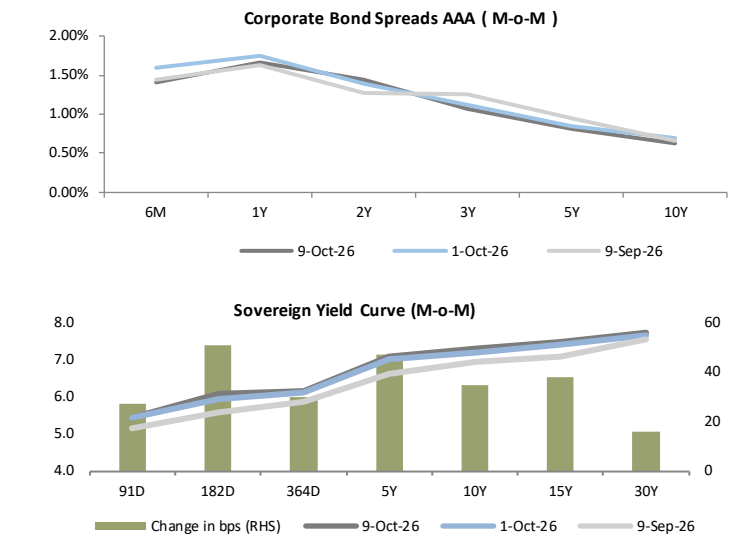
- The interbank call-money rate ended lower at 5.00% on Friday compared to 5.45% on Thursday.
- Government bond prices ended lower on Friday as volatile crude oil prices and expectations of further RBI policy tightening pressured the market.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.30% on Friday compared to 7.29% on Thursday.

Economy and Government

- RBI data showed India's foreign exchange reserves declined by \$12.95 billion to reach \$734.6 billion during the week ended October 2
- Prime Minister Narendra Modi inaugurated and laid the foundation stone for projects worth over Rs 13,000 crore in Tamil Nadu, reaffirming support for the state's economic development.
- Commerce Minister Piyush Goyal said changing global circumstances will influence the final contours of the proposed India-US trade agreement.
- Ministry of Finance retained the interest rate on the General Provident Fund (GPF) and other government provident funds at 7.1% for the October-December 2026 quarter.
- GST Council proposes 5% GST rate for EV-based transport and rental services.
- According to data from the Goods and Services Tax Network (GSTN) E-way bill generation in September grew 7.21% year-on-year (Y-o-Y) hitting a record 141.53 million.
- The Goods and Services Tax (GST) Council has approved a series of changes to input tax credit (ITC) rules, widening the range of business expenses eligible for credit and allowing refunds of accumulated credit on input services and plant and machinery.
- The Union Ministry of Health and Family Welfare proposed stricter rules for advertising prescription medicines, extending existing restrictions to pharmacies, wholesalers and other licensed drug sellers.
- The Reserve Bank of India (RBI) introduced a special dollar window for oil marketing companies and eased certain forex derivatives norms to support currency market stability.
- The RBI tightened liquidity conditions by raising the daily CRR maintenance requirement to 99% following its recent policy rate hike.
- SEBI Chairman Tuhin Kanta Pandey said the regulator will issue closing auction guidelines within a week to strengthen market efficiency and price discovery.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.22	7.78	8.50	8.58	9.81
3-Yr	6.82	8.02	8.74	8.82	10.05
5-Yr	7.11	8.05	8.87	8.95	10.18
10-Yr	7.30	8.07	8.89	8.97	10.20

* Weighted average yields



Global Indices	Oct 9	1D % Chg	3M % Chg	1Y % Chg
DJIA	51655	0.83	-1.59	11.43
Nasdaq	27366	0.64	4.42	18.86
FTSE 100	10552	1.06	0.76	10.96
DAX	25087	1.13	-0.12	1.93
Nikkei 225	69031	-0.02	1.90	42.10
Hang Seng	24211	1.79	0.75	-9.50
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Oct 9	1D Ago	3M Ago	1Y Ago
US	5.24	5.22	4.54	4.14
UK	5.43	5.43	4.90	4.75
German	3.48	3.49	3.05	2.70
Japan	3.02	3.09	2.88	1.69

Commodity Prices	Oct 9	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	104.72	104.28	76.3	65.22
NYMEX Crude Oil (\$/bbl)	91.85	91.49	72.08	61.51
Gold (Rs / 10 gm)#	149430	147646	143656	122629

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Currencies Vs INR	Oct 9	1D Ago	M Ago	3M Ago
USD	96.61	96.77	95.15	95.37
GBP	127.89	127.74	129.02	128.03
Euro	108.47	108.38	110.78	109.14
100 Yen	61.08	61.19	62.17	58.77
Forex Reserve (\$ bn)*	734.61	747.56	740.80	666.93

* Data pertains to Oct 9 and Oct 2 respectively Source: CRISIL

Key Macro Indicators	
CPI	4.82% (Aug'-2026)
WPI	9.92% (Aug'-2026)
IIP	6.70% (Jul' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

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Capital Market

- Cochin Shipyard plans to invest around Rs 6,000 crore in two projects pertaining to shipbuilding and repair work.
- NCC secured Rs 1,286 crore road project order in Telangana.
- JM Frictech India Ltd (JMI) invested around Rs 50 crore in setting up its fourth manufacturing facility in Chandigarh
- NTPC invited Expressions of Interest (EoI) for up to 26% equity participation in its co-generation power projects.
- Suzlon Energy plans to invest Rs 550 crore to establish three AI-powered wind turbine blade manufacturing facilities by 2027.
- The Airports Authority of India (AAI) launched a Rs 165 crore project to automate security tray movement systems at airports and improve passenger processing efficiency.

Global Equity

- Wall Street stocks closed higher on Friday, as investors turned their focus on the upcoming Q3 earnings season and key inflation data releases, which are expected to provide further clues on the Federal Reserve's future policy path.
- US 10yr yield ended higher at 5.24% as high oil prices fuel inflation concerns and worries over the country's growing public debt.
- FTSE index closed higher on Friday, as retreating gilt yields improved investor sentiment.
- Asian markets were trading higher at 8.30 AM.

International

- US inflation rate accelerated for the second consecutive month to 2.7% US Michigan 1-Year Inflation Expectations remained at 4.7% in October 2026 for the second consecutive month, maintaining the highest level since May.
- US Michigan Consumer Expectations improved to 47.3 in October 2026 from 46.3 in September.
- US consumer sentiment index declined to 46.3 in early October 2026 according to preliminary estimates, reaching its lowest level since May's record low and falling below market expectations of 47.6.
- US Michigan 5-Year Inflation Expectations increased for the second consecutive month to 3.5% in October 2026, reaching its highest level since May, up from 3.4% in September.

Upcoming market indicators

- Eurozone ECB Monetary Policy Meeting Accounts (Oct 08)
- Japan Current Account, Aug (Oct 08)
- India Inflation Rate, Sep (Oct 12)
- Japan PPI, Sep (Oct 13)
- US Inflation Rate, Sep (Oct 14)
- US CPI, Sep (Oct 14)