

Broad Indices	Oct 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	71925	-0.76	-7.28	-12.82	19.07
Nifty 50	22363	-0.70	-7.62	-11.56	19.12
BSE Mid cap	45393	0.43	-6.21	-2.09	NA
Nifty Midcap 100	58835	0.08	-1.15	0.23	27.75

Sectoral Indices	Oct 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	55562	0.75	-6.48	-6.82
BSE Bankex	61861	-0.48	-5.83	-3.15
BSE CD	57113	-0.07	-7.89	-4.14
BSE CG	74254	1.31	-6.13	6.76
BSE FMCG	16828	-1.34	-8.59	-16.82
BSE Healthcare	48854	0.05	-2.18	9.32
BSE IT	27220	-0.68	0.03	-22.20
BSE Metal	37831	-0.39	-7.31	11.30
BSE Oil & Gas	24077	-0.33	-8.53	-12.01
BSE Power	7024	0.54	-10.31	3.36
BSE Realty	6330	0.80	-13.58	-9.12

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Dr. Reddys Lab	2.71	Apollo Hospitals	-3.15
Bajaj Auto	2.62	ITC	-3.05
Tata Motors	1.63	Tech Mahindra	-2.85
BEL	1.56	L&T	-2.05
BSE	1.31	Max Health	-2.02

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 9	MF Inv Oct 9	DII Inv Oct 12
Buy	10907	11957	15507
Sell	14158	7535	12462
Net	-3251	4421	3045
Net (YTD)	-305456	458697	675383

Policy rates	Oct 12	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 12	1W Ago	M Ago	3M Ago
Call (%)	5.24	4.80	5.10	5.35
10 Yr Gilt(%)^	7.39	7.21	7.02	6.71
TREP (%)	5.10	5.00	4.99	5.50
Short-term debt	Oct 12	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.10	7.25	6.75	7.00
6-month CPs (%)	7.70	7.60	7.05	7.27
3-month CDs (%)	6.50	6.50	6.03	6.70
6-month CDs (%)	7.26	7.16	6.60	6.87
182-day T-bill (%)^	6.09	5.94	5.60	5.45
364-day T-bill (%)^	6.25	6.12	5.87	5.61
Long-term debt	Oct 12	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.87	6.75	6.38	6.16
5-Y G-sec (%)	7.17	7.07	6.75	6.38
10-Y G-sec (%)	7.39	7.21	7.02	6.71

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Monday, as concerns over inflation—driven by higher crude oil prices and a weaker monsoon—outweighed the RBI's latest measures to support the currency, keeping investor sentiment subdued.
- The top gainers were Dr. Reddy's Laboratories, Bajaj Auto, Tata Motors Passenger Vehicles, Bharat Electronics and BSE, up 1.31-2.71%.
- The top losers were Apollo Hospitals Enterprise, ITC, Tech Mahindra, Larsen & Toubro and Max Healthcare Institute, down 2.02-3.15%.

Indian Debt

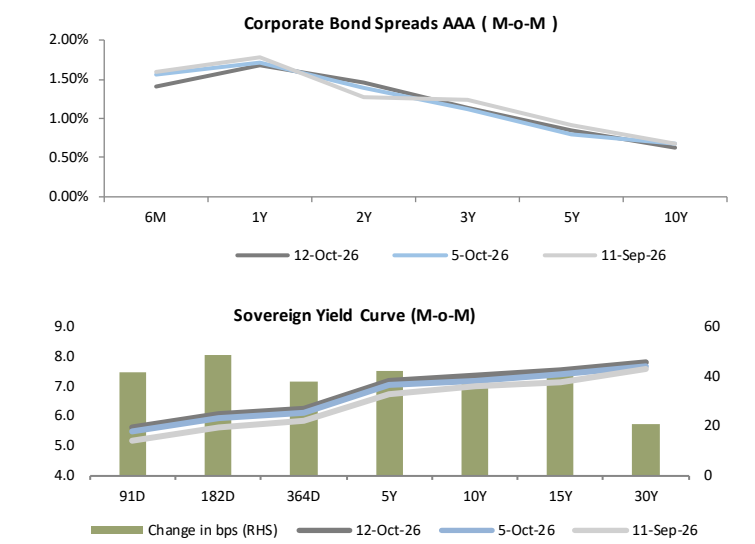
- The interbank call-money rate ended higher at 5.24% on Monday compared to 5.00% on Friday.
- Government bond prices ended lower on Monday as the RBI's liquidity-tightening measures and higher-than-expected inflation reinforced expectations of further rate hikes.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.39% on Monday compared to 7.30% on Friday.

Economy and Government

- India's retail inflation accelerated to 5.54% in September 2026 compared to 4.83% in August 2026, due to higher food and fuel prices.
- The International Monetary Fund (IMF) raised India's FY27 GDP growth forecast to 7.0%, citing resilient domestic demand and continued strength in economic activity, while warning that higher global oil prices remain a key downside risk to the outlook.
- The Central Government directed all states and Union Territories to ensure health service charges are prominently displayed at clinics and healthcare facilities to improve transparency.
- The government approved an investment of Rs 440 crore to upgrade nine ITIs across locations including Surat and Visakhapatnam, strengthening vocational training infrastructure.
- The government proposed capping trade margins on anti-cancer drugs at 30% of MRP, aiming to improve affordability and accessibility.
- Commerce Minister Piyush Goyal said European automakers are likely to increasingly favour India as a global manufacturing hub, supported by the country's growing automotive ecosystem.
- Commerce Minister Piyush Goyal said India's proposed trade agreements with the European Union and the United Kingdom are expected to encourage global automakers to establish manufacturing facilities in India.
- SEBI notified a common advertising code for market intermediaries, while permitting celebrity endorsements for brands under specified guidelines.
- SEBI urged brokerage firms to join its return verification platform, aimed at improving the authenticity and transparency of performance claims.
- SEBI urged brokerage firms to join its return verification platform to enhance transparency and improve the credibility of performance-related claims.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.29	7.87	8.59	8.67	9.90
3-Yr	6.87	8.13	8.85	8.93	10.16
5-Yr	7.17	8.15	8.97	9.05	10.28
10-Yr	7.39	8.16	8.98	9.06	10.29

* Weighted average yields



Global Indices	Oct 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	51851	0.38	-1.49	14.01
Nasdaq	27246	-0.44	3.67	22.70
FTSE 100	10656	0.99	1.51	13.03
DAX	25278	0.76	0.84	4.27
Nikkei 225	Closed	NA	NA	NA
Hang Seng	24271	0.25	0.40	-7.68
KOSPI	6384	-8.03	-14.60	76.82

Global 10 yr Sov. Yields (%)	Oct 12	1D Ago	3M Ago	1Y Ago
US	5.231	5.24	4.56	4.05
UK	5.44	5.44	4.89	4.67
German	3.48	3.49	3.03	2.63
Japan	3.00	3.02	2.77	1.69

Commodity Prices	Oct 12	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	106.65	104.72	76.01	62.73
NYMEX Crude Oil (\$/bbl)	93.74	91.85	71.41	58.9
Gold (Rs / 10 gm)#	148061	149430	143368	121525

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Currencies Vs INR	Oct 12	1D Ago	M Ago	3M Ago
USD	95.75	96.61	95.72	95.31
GBP	126.92	127.89	129.45	128.03
Euro	107.30	108.47	111.15	109.08
100 Yen	60.46	61.08	62.14	59.02
Forex Reserve (\$ bn)*	734.61	747.56	785.71	674.19

* 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

- Emcure Pharmaceuticals approved the merger of its wholly owned subsidiaries, Zuventus Healthcare and Emcutix Biopharmaceuticals, into the parent company as part of its corporate restructuring and operational streamlining strategy.
- CreditAccess Grameen raised \$175 million through a syndicated social loan, supporting its lending and financial inclusion initiatives.
- HCLTech signed a partnership with Anthropic to establish a dedicated AI business unit, expanding its artificial intelligence capabilities and offerings.
- L&T Technology Services (LTTS) launched an AI-native Engineering Intelligence (EI) Lab focused on digital manufacturing and physical AI applications.
- Tata Motors and Stellantis partnered to develop vehicles in India for more than 50 global markets, strengthening India's role in global automotive manufacturing.

Global Equity

- Wall Street stocks ended mixed on Monday, with Nasdaq declining due to higher oil prices and losses in technology shares, while Dow Jones advanced on gains in energy and defensive sectors ahead of the earnings season and key inflation data releases.
- US 10yr yield ended marginally lower at 5.23% influenced by reports that the US Treasury may use its General Account to fund extended long-end debt buybacks.
- FTSE index closed higher on Monday, supported by gains in financial and healthcare stocks ahead of key US inflation and UK GDP data releases.
- Asian markets were trading lower at 8.30 AM.

International

- Japan's producer prices rose 6.8% year-on-year in September 2026, compared to 7.6% in August 2026.
- Japan's bank lending grew by 5.3% year-on-year in September 2026 unchanged from the previous month.

Upcoming market indicators

- India Inflation Rate, Sep (Oct 12)
- Japan PPI, Sep (Oct 13)
- US Inflation Rate, Sep (Oct 14)
- US CPI, Sep (Oct 14)