

## Domestic Market Performance

Indian market indices	04- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25015	-0.93	-0.73	44.10	28.70
BSE Sensex	81688	-0.98	-0.81	38.47	25.24
BSE 100	26490	-0.99	-0.84	50.50	32.96
BSE 200	11559	-1.00	-0.99	56.44	35.66
BSE 500	37092	-0.96	-1.05	60.16	36.68
BSE SmallCap	55945	-0.80	-0.47	107.54	49.47
BSE MidCap	47907	-0.94	-2.36	99.07	50.29
BSE LargeCap	9773	-0.99	-0.83	48.43	32.28
<b>Sectoral indices</b>					
BSE IT	42361	0.41	-1.75	48.74	31.96
BSE Oil & Gas	30509	-0.99	-6.17	75.51	63.90
BSE FMCG	23013	-1.67	-1.15	39.58	23.70
BSE Auto	58540	-1.50	-0.17	107.24	63.57
BSE Bankex	58394	-0.62	0.02	26.86	18.35
BSE Teck	19549	-0.05	-0.94	50.63	35.06
BSE Capital Goods	70301	-0.64	-3.46	104.54	47.78
BSE Consumer Durable	65858	-1.35	3.11	75.02	44.94

Turnover (Rs Cr)	04- Oct	03- Oct
BSE Cash	9717	10255
NSE Cash	127530	137063
NSE F&O	17594001	54101355

Rs. Cr (Equity)	FII Inv 03-Oct	MF Inv 01- Oct	DII Inv 04- Oct
Buy	17,726	12,043	20,287
Sell	33,232	7,494	11,381
Net	-15,507	4,549	8,905
Net (MTD)	-20,715	4,549	26,429
Net (YTD)	71,372	276,443	368,491

	04- Oct	1Day	Month ago	Year ago
USD	83.97	83.97	83.97	83.24
GBP	110.56	110.14	110.15	100.96
Euro	92.58	92.69	92.83	87.38
100 Yen	57.33	57.17	57.89	55.81

## Indian markets

- Indian equities ended lower on Friday amid a volatile session, dragged down by geopolitical concerns. SEBI tightening F&O rules earlier this week also weighed down sentiment.
- The top losers were Mahindra & Mahindra, Bajaj Finance, Nestle, Hero Motocorp and BPCL, down 2.47-3.59%.
- The top gainers were Infosys, ONGC, HDFC Life, Tech Mahindra and Wipro, up 0.64-1.31%.

## Indian debt

- The interbank call money rate ended higher at 6.25% on Friday compared to 5.75% on Thursday.
- Government bond prices ended lower on Friday due to rise in the US treasury yields.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended higher at 6.83% on Friday compared to 6.75% on Thursday.

## Indian Rupee

- The rupee ended marginally lower against the US dollar on Friday due to significant equity outflows and rise in crude oil prices amid rising geopolitical tension in Middle East.

## Regulatory

- The Centre has offered to repurchase up to Rs 25,000 crore worth of government securities through a buyback auction that will be conducted by the Reserve Bank of India on October 10.
- The Reserve Bank of India said group entities of banks shall not be used to circumvent guidelines applicable to the parent for carrying on business activities that are not otherwise permitted.
- The Securities and Exchange Board of India (Sebi) increased the minimum contract size in index derivatives to Rs 15 lakh from the current Rs 5 lakh, making options trading costlier.
- SEBI proposed allowing registered stock brokers to participate in the G-Secs market through the Negotiated Dealing System-Order Matching (NDS-OM)—operated by the Reserve Bank of India (RBI).
- Sebi extended the relaxation given to listed companies from sending physical copies of financial statements to shareholders for annual general meetings (AGMs) by one more year till September 30, 2025.
- Securities and Exchange Board of India (Sebi) granted in-principle approval to Jio Financial Services and BlackRock Financial Management Inc to act as co-sponsors and set up proposed fund.

## Economy and Government

- India HSBC Services PMI slowed to 57.7 in September from 60.9 in August while composite PMI eased to 58.3 from 60.7.
- Prime Minister Narendra Modi while addressing the Kautilya Economic Conclave asserted that world's confidence in India remained high despite uncertainties.
- Prime Minister Narendra Modi launched Rs 23,300 crore initiatives related to agriculture and animal husbandry sectors at Washim in Maharashtra.
- Prime Minister Narendra Modi released Rs 20,000 crore as the 18th instalment of the PM-KISAN scheme.
- The Asian Development Bank (ADB) has approved a loan of \$162 million to support tourism development in Himachal Pradesh
- Finance Minister Nirmala Sitharaman said that India's per capita income is projected to increase by \$2000 in the next five years.

## Domestic Debt Market Indicators

Instrument	04- Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.25%	5.75%	5.75%	5.75%	5.50%	5.80%
3-Month T-Bill	6.47%	6.47%	6.64%	6.73%	6.83%	6.82%
6-Month T-Bill	6.54%	6.54%	6.71%	6.87%	7.13%	7.02%
1-year T-Bill	6.54%	6.54%	6.72%	6.92%	7.18%	7.06%
3-Month CD	7.20%	7.15%	7.21%	7.12%	7.00%	7.10%
6-Month CD	7.43%	7.43%	7.45%	7.40%	7.37%	7.40%
1-year CD	7.58%	7.58%	7.64%	7.62%	7.60%	7.50%
3-Month CP	7.60%	7.65%	7.64%	7.78%	7.35%	7.65%
6-Month CP	7.75%	7.80%	7.88%	7.80%	7.71%	7.80%
1-year CP	7.80%	7.85%	7.90%	7.95%	7.90%	7.85%
1-year Gilt	6.59%	6.61%	6.73%	6.91%	7.14%	7.11%
3-year Gilt	6.70%	6.69%	6.75%	6.96%	7.16%	7.29%
5-year Gilt	6.74%	6.69%	6.76%	7.00%	7.19%	7.26%
1-year AAA	7.66%	7.63%	7.65%	7.68%	7.70%	7.50%
3-year AAA	7.48%	7.45%	7.58%	7.62%	7.70%	7.63%
5-year AAA	7.33%	7.30%	7.48%	7.55%	7.70%	7.63%
10-year G-sec	6.83%	6.78%	6.86%	7.00%	7.31%	7.24%
Net LAF (Rs Cr)	288364	213430	245617	133220	104121	-47146
Forex reserves (\$ bn)	704.89	692.30	681.69	653.71	578.78	590.70

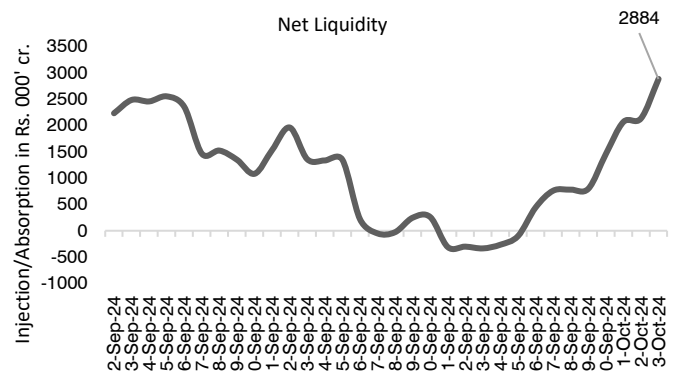
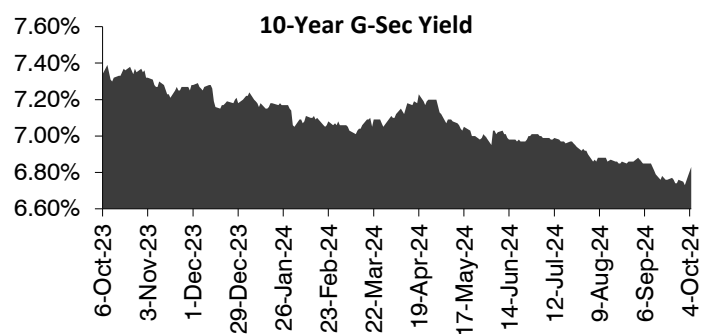
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.54	7.58	8.32	8.37	9.66	10.06
1 Year	6.59	7.66	8.40	8.45	9.74	10.14
3 Year	6.70	7.48	8.22	8.27	9.56	9.96
5 Year	6.74	7.33	8.18	8.23	9.52	9.92
10 Year	6.83	7.22	8.07	8.12	9.41	9.81

Rs. Cr (Debt)	FII Inv 03-Oct	MF Inv 01-Oct
Buy	634	9,485
Sell	1,543	4,935
Net	-908	4,550
Net (MTD)	-1,047	4,550
Net (YTD)	105,432	-251,133

Economic Indicators	Latest	Quarter	Year Ago
CPI	3.65% (Aug-24)	4.75% (May-24)	6.83% (Aug-23)
WPI	1.31% (Aug-24)	2.61% (May-24)	-0.52% (Aug-23)
IIP	4.8% (Jul-24)	4.83% (Apr-24)	6.2% (Jul-23)
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)
India Manufacturing PMI	56.5 (Sep-24)	58.3 (Jun-24)	57.5 (Sep-23)
India Service PMI	57.7 (Sep-24)	60.5 (Jun-24)	61 (Sep-23)

## Capital markets

- BSE's wholly-owned subsidiary, Asia Index Private Ltd, launched three indices namely BSE Sensex Sixty 65: 35, BSE Sensex Sixty and BSE Power and Energy Index.
- Gravita India received board's granted approval for raising up to Rs 1,000 crore through the issuance of equity shares.
- Piramal Capital and Housing Finance raised \$150 million through a global bond sale.
- Dev Accelerator has filed its draft red herring prospectus (DRHP) for an initial public offer (IPO) with SEBI to raise around Rs 125cr.
- SAMHI Hotels' board approved the 100% acquisition of Innmar Tourism and Hotels for an enterprise value of Rs 205 crore.



Global market indices	04- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42352.75	0.81	3.36	27.28	27.84
Nikkei 225	38635.62	0.22	4.29	37.78	26.56
FTSE	8280.63	-0.02	0.13	8.50	11.71
Hang Seng	22736.87	2.82	30.24	11.45	32.22
Taiwan	22302.71	-0.39	5.74	40.55	37.05

Global debt	04- Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	3.98	3.85	3.77	4.36	3.49	4.74
UK 10-Year (%)	4.13	4.02	3.99	4.20	3.49	4.66
German 10-Year (%)	2.21	2.14	2.27	2.59	2.30	2.94
Japan 10-Year (%)	0.90	0.87	0.90	1.08	0.33	0.80

Domestic	04- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	75964	0.46	6.55	27.13	34.09
Silver (Rs / Kg)	92200	1.69	13.36	28.80	36.66
Aluminium (Rs / Kg)	243	0.25	9.89	14.49	15.39
Copper (Rs / kg)	855	-0.37	8.79	9.91	21.49
Lead (Rs / kg)	197	3.86	2.61	3.23	0.69
Zinc (Rs /Kg)	291	-0.22	9.57	12.06	29.45
Nickel (Rs / kg)	1508	-0.88	8.73	-24.60	-5.44

Global	04- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2655.74	-0.17	6.53	-0.17	45.63
Silver (oz/\$)	3204.00	0.60	14.22	0.60	50.99
Brent (\$/bbl)	78.05	0.55	7.36	0.55	-9.04
NYMEX crude (\$/bbl)	74.38	0.91	7.49	0.91	-11.68

## Upcoming market indicators

Date	Indicator	Previous
October 10	US Inflation rate, September	2.5%
October 11	US PPI, September	1.7%
October 11	UK GDP, August	1.2%
October 13	China Inflation rate, September	0.6%
October 14	US Consumer Inflation Expectation, September	3.0%

**Source:** Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

**Abbreviations:** FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

## Global markets:

- Wall Street stocks ended higher on Friday driven by a stronger-than-expected jobs report which eased investor concerns about weakening economy.
- 10-year US bond yield ended higher at 3.98% following better than expected nonfarm payroll data.
- FTSE index ended flat on Friday as gains due to strong US jobs report were cut short due to escalating geopolitical concerns.
- Asian markets were trading higher at 8.30 AM.
- The US economy added 254,000 jobs in September much higher than an upwardly revised 159,000 in August while unemployment rate fell to 4.1% the lowest in three months, down from 4.2%.
- Eurozone HCOB Construction PMI rose to 42.1 in September compared to 41.4 in the previous month.
- UK S&P Global Construction PMI soared to 57.2 in September from 53.6 in August.

## Commodity

- Crude oil prices rose 67 cents to \$74.38 a barrel on the NYMEX due to rising fears of broader geopolitical issues.
- Domestic gold prices ended higher on escalating geopolitical tensions.

## Forthcoming results

Date	Company
NA	NA

	Indicators	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24	Dec-23	Nov-23
Debt Indicators	Currency in circulation (Rs billion)	35,231	35,600	35,814	35,792	35,455	34,849	34,342	33,902	33,636	33,335
	Repo rate	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%	7.18%	7.28%
	Call rate	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%	6.25%	6.65%
	Forex reserves (\$ billion; mthly. avg.)	674	662	653	644	644	633	618	619	609	591
Economy	GDP	NA	NA	6.70%			7.80%			8.60%	
	Fiscal deficit (Rs billion)	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24	756.94	1028.84
	IIP, %y/y	NA	4.80%	4.20%	5.90%	5.00%	5.40%	5.60%	4.20%	4.40%	2.50%
	Exports, \$ billion	NA	NA	35.2	38.13	34.99	41.68	41.4	36.92	38.45	33.9
	Imports, \$ billion	NA	NA	56.18	61.91	54.09	57.28	60.11	54.41	58.25	54.48
	Manufacturing PMI	57.5	58.1	58.3	57.5	58.8	59.1	56.9	56.5	54.9	56
	Services PMI	60.9	60.3	60.5	60.2	60.8	61.2	60.6	61.8	59	56.9
	GST collections (Rs crore)	174,962	182,075	173,813	172,739	210,267	178,484	168,337	172,129	164,882	167,929
	India crude oil import (mbpd)	NA	19.36	18.45	21.75	21.44	20.69	18.01	21.39	19.54	18.57
Sector update	Auto – Passenger vehicles	-2.2%	-2.30%	4.30%	20.50%	35.40%	9.74%	-5.40%	-1.32%	3.70%	-10.10%
	Auto – Two-wheelers	9.6%	12.45%	19.51%	1.09%	22.78%	15.27%	34.60%	26.20%	16.00%	31.30%
	Auto – Commercial vehicles	-11.63%	-12.29%	-8.30%	-0.10%	14.40%	-7.74%	-4.20%	-4.40%	-10.00%	3.30%
	Auto – Tractors	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%	-17.00%	-15.30%	-19.80%	6.40%
	Banks – Deposit growth	NA	11.30%	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%	13.10%	13.40%
	Banks – Credit growth	NA	13.90%	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%	20.30%	20.80%
	Infra – Coal	NA	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%	10.70%	10.90%
	Infra – Electricity	NA	7.00%	7.70%	12.80%	9.40%	8.00%	7.50%	5.20%	1.20%	5.70%
	Infra – Steel	NA	7.20%	2.70%	7.60%	7.10%	5.50%	9.10%	7.00%	7.60%	9.40%
	Infra – Cement	NA	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%	3.80%	-4.00%

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