



Domestic Market Performance

Indian market indices	07- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24796	-0.87	-0.23	42.83	26.16
BSE Sensex	81050	-0.78	-0.16	37.39	22.81
BSE 100	26192	-1.13	-0.70	48.80	30.09
BSE 200	11413	-1.26	-0.98	54.47	32.64
BSE 500	36550	-1.46	-1.36	57.82	33.39
BSE SmallCap	54118	-3.27	-3.32	100.76	42.94
BSE MidCap	47019	-1.85	-3.06	95.38	46.58
BSE LargeCap	9659	-1.17	-0.70	46.70	29.35
Sectoral indices					
BSE IT	42495	0.32	-0.82	49.21	30.18
BSE Oil & Gas	29783	-2.38	-6.07	71.33	59.23
BSE FMCG	22845	-0.73	-1.09	38.56	22.32
BSE Auto	58318	-0.38	1.14	106.46	60.95
BSE Bankex	57168	-2.10	-0.22	24.19	14.68
BSE Teck	19638	0.46	0.51	51.32	33.81
BSE Capital Goods	68792	-2.15	-3.30	100.15	42.71
BSE Consumer Durable	64612	-1.89	1.16	71.71	38.86

Turnover (Rs Cr)	07- Oct	04- Oct
BSE Cash	9511	9717
NSE Cash	127522	127530
NSE F&O	34086630	17594001

Rs. Cr (Equity)	FII Inv 03-Oct	MF Inv 03- Oct	DII Inv 07- Oct
Buy	14,962	20,818	23,924
Sell	24,607	9,765	10,679
Net	-9,645	11,053	13,245
Net (MTD)	-30,360	15,603	39,674
Net (YTD)	61,727	287,496	381,736

	07- Oct	1Day	Month ago	Year ago
USD	83.97	83.97	83.94	83.25
GBP	110.10	110.56	110.60	101.56
Euro	92.19	92.58	93.30	87.84
100 Yen	56.69	57.33	58.81	55.86

Indian markets

- Indian equities ended lower on Monday as China's aggressive fiscal measures raised concerns over foreign portfolio investments.
- The top losers were Adani Ports, Bharat Electronics Ltd, NTPC, Coal India and SBI, which were down 3.26-4.14%.
- The top gainers were Mahindra & Mahindra, ITC, Trent, Bharti Airtel and Infosys, which were up 0.84-1.42%.

Indian debt

- The interbank call money rate ended lower at 5.75% on Monday compared to 6.25% on Friday.
- Government bond prices ended flat on Monday as investors remained on the sidelines ahead of RBI's interest rate decision due this week.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 6.83% on Monday.

Indian Rupee

- The rupee ended marginally higher against the US dollar on Monday due to weakness in dollar index and decline in crude oil prices.

Regulatory

- The Reserve Bank of India (RBI) entered into a currency swap agreement with the Maldives Monetary Authority (MMA) under the SAARC Currency Swap Framework for 2024-2027.
- Sebi extended the timeline to January 2025 for social enterprises, which have registered or mobilised funds through social stock exchange, to submit annual disclosures and 'annual impact report' for the financial year 2023-24.

Economy and Government

- According to S&P Global Commodity Insights, India's clean energy capacity is expected to surge by 2030, driven by strategic government initiatives like the Production-Linked Incentive (PLI) scheme.
- India reduced the local remedies period for UAE investors from five years to three years under the new BIT.
- India and France signed MoU for bilateral coop to strengthen aerospace ties.
- The Gujarat government began 'Vikas Saptah' to mark the state's development under the chief ministership of Narendra Modi.
- Commerce and Industry Minister Piyush Goyal said India is poised to attract \$100 bn in investments from the United Arab Emirates in the coming years.
- Central Board of Direct Taxes (CBDT) launched a portal to invite suggestions from the public.
- The Income Tax department invited public inputs for review of the six-decade old I-T Act with regard to simplification of language, litigation reduction, compliance reduction, and obsolete provisions.

Domestic Debt Market Indicators

Instrument	07- Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	6.25%	6.25%	6.05%	5.50%	6.20%
3-Month T-Bill	6.46%	6.47%	6.66%	6.72%	6.83%	6.84%
6-Month T-Bill	6.52%	6.54%	6.70%	6.88%	7.13%	7.08%
1-year T-Bill	6.55%	6.54%	6.75%	6.92%	7.18%	7.11%
3-Month CD	7.24%	7.20%	7.26%	7.12%	7.00%	7.10%
6-Month CD	7.43%	7.43%	7.51%	7.40%	7.37%	7.40%
1-year CD	7.58%	7.58%	7.66%	7.62%	7.60%	7.50%
3-Month CP	7.52%	7.60%	7.64%	7.78%	7.35%	7.40%
6-Month CP	7.75%	7.75%	7.82%	7.75%	7.71%	7.75%
1-year CP	7.80%	7.80%	7.90%	7.95%	7.90%	7.85%
1-year Gilt	6.59%	6.59%	6.73%	6.93%	7.14%	7.15%
3-year Gilt	6.71%	6.70%	6.73%	6.95%	7.16%	7.36%
5-year Gilt	6.76%	6.74%	6.75%	6.99%	7.19%	7.39%
1-year AAA	7.67%	7.66%	7.65%	7.68%	7.70%	7.50%
3-year AAA	7.49%	7.48%	7.58%	7.62%	7.70%	7.62%
5-year AAA	7.34%	7.33%	7.48%	7.55%	7.70%	7.62%
10-year G-sec	6.85%	6.83%	6.85%	6.99%	7.31%	7.34%
Net LAF (Rs Cr)	202222	288364	235315	128610	104121	2761
Forex reserves (\$ bn)	704.89	692.30	683.99	652.00	578.78	586.91

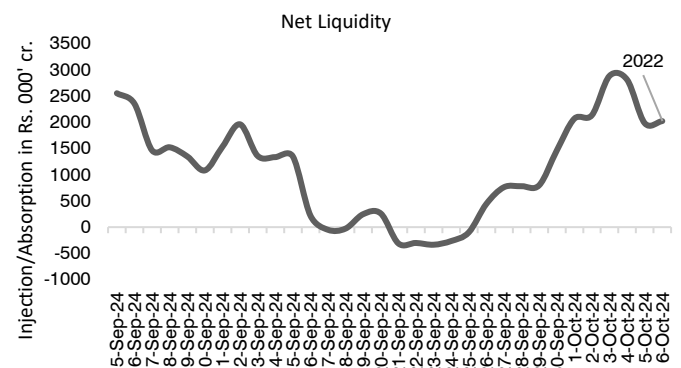
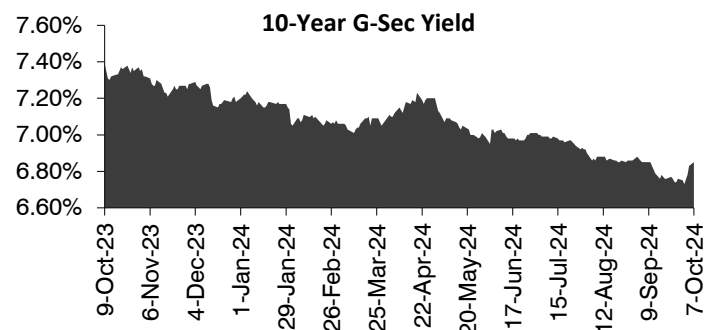
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.52	7.61	8.35	8.40	9.69	10.09
1 Year	6.59	7.67	8.41	8.46	9.75	10.15
3 Year	6.71	7.49	8.23	8.28	9.57	9.97
5 Year	6.76	7.34	8.19	8.24	9.53	9.93
10 Year	6.85	7.23	8.08	8.13	9.42	9.82

Rs. Cr (Debt)	FII Inv 03-Oct	MF Inv 01-Oct
Buy	772	11,357
Sell	707	10,777
Net	65	580
Net (MTD)	-982	5,130
Net (YTD)	105,497	-250,553

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

- HDFC Bank's board approved the sale of a 100% stake in HDFC Education and Development Services to Vama Sundari Investments (Delhi) for Rs 192 crore.
- Northern Arc launched a Category II AIF fund, Finserv Fund and plans to raise Rs 1,500 crore.
- XDLINX Space Labs raised \$7 million in a seed funding round.
- Suraksha Diagnostic Ltd received Sebi's go ahead to raise funds through an initial public offering (IPO).
- Nayan Tech raised \$2 million from investors led by Beenext.



Global market indices	07- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	41954.24	-0.94	3.99	26.09	25.58
Nikkei 225	39332.74	1.80	8.08	40.27	26.90
FTSE	8303.62	0.28	1.49	8.80	10.80
Hang Seng	23099.78	1.60	32.42	13.23	32.10
Taiwan	22702.56	1.79	5.91	43.07	37.42

Global debt	07- Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.03	3.98	3.72	4.28	3.49	4.78
UK 10-Year (%)	4.21	4.13	3.89	4.13	3.49	4.58
German 10-Year (%)	2.25	2.21	2.17	2.53	2.30	2.89
Japan 10-Year (%)	0.93	0.90	0.86	1.07	0.33	0.80

Domestic	07- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	75933	-0.04	5.56	27.08	34.30
Silver (Rs / Kg)	91940	-0.28	10.32	28.44	37.03
Aluminium (Rs / Kg)	243	-0.27	9.25	14.18	17.73
Copper (Rs / kg)	855	-0.09	8.04	9.80	22.07
Lead (Rs / kg)	192	-2.09	-0.57	1.08	-1.46
Zinc (Rs /Kg)	292	0.50	11.06	12.62	29.72
Nickel (Rs / kg)	1517	0.54	11.57	-24.19	-4.32

Global	07- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2651.99	-0.14	5.34	-0.14	44.66
Silver (oz/\$)	3218.00	0.44	11.54	0.44	48.91
Brent (\$/bbl)	80.93	3.69	13.89	3.69	-4.32
NYMEX crude (\$/bbl)	77.14	3.71	13.99	3.71	-6.82

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%

Global markets

- Wall Street stocks closed lower on Monday due to concerns over geopolitical tensions impacting oil prices.
- 10-year US bond yield ended higher at 4.03% amid diminishing hopes of aggressive Fed rate cuts and strong labor market data.
- FTSE index closed higher on Monday driven by energy stocks and a softer labour market report.
- Asian markets were trading higher at 8.30 AM.
- Eurozone retail sales increased 0.8% in August compared to a 0.1% decrease in July.
- UK Halifax House Price Index increased 4.7% on year in September, following an 4.3% rise in August.
- Japan Coincident Index fell to 113.5 in August from 117.3 in July, and the leading economic index decreased to 106.7 from a marginally revised 109.3.
- Japan Household spending declined by 1.9% in August compared to 0.1% rise in the previous month.
- Japan's current account surplus increased to 3,803.6 billion yen in August from 2,293.8 billion yen in the same month a year earlier.

Commodity

- Crude Oil prices rose \$2.76 to \$77.14 a barrel on the NYMEX due to persistent supply worries following ongoing geopolitical issues.
- Domestic gold prices ended marginally lower on profit booking at higher level.

Forthcoming results

Date	Company
Oct 10	Tata Consultancy Services Ltd.
Oct 15	HDFC Life Insurance Company Ltd.

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

	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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