

Domestic Market Performance

Indian market indices	08- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25013	0.88	0.65	44.09	27.27
BSE Sensex	81635	0.72	0.56	38.38	23.70
BSE 100	26500	1.18	0.47	50.55	31.62
BSE 200	11564	1.32	0.33	56.51	34.40
BSE 500	37066	1.41	0.03	60.04	35.27
BSE SmallCap	55440	2.44	-0.96	105.66	46.43
BSE MidCap	47892	1.86	-1.26	99.00	49.30
BSE LargeCap	9777	1.23	0.52	48.49	30.93
Sectoral indices					
BSE IT	42733	0.56	-0.26	50.05	30.91
BSE Oil & Gas	30158	1.26	-4.88	73.49	61.24
BSE FMCG	23007	0.71	-0.39	39.54	23.19
BSE Auto	59296	1.68	2.84	109.92	63.65
BSE Bankex	57805	1.11	0.90	25.58	15.95
BSE Teck	19731	0.47	0.98	52.03	34.44
BSE Capital Goods	70731	2.82	-0.58	105.80	46.73
BSE Consumer Durable	65071	0.71	1.87	72.93	39.85

Turnover (Rs Cr)	08- Oct	07- Oct
BSE Cash	6529	9511
NSE Cash	113420	127522
NSE F&O	45423019	34086630

Rs. Cr (Equity)	FII Inv 03-Oct	MF Inv 04- Oct	DII Inv 08- Oct
Buy	14,937	16,694	19,495
Sell	23,063	8,976	12,494
Net	-8,127	7,718	7,001
Net (MTD)	-38,487	23,320	46,674
Net (YTD)	53,600	295,213	388,737

	08- Oct	1Day	Month ago	Year ago
USD	83.96	83.97	83.94	83.25
GBP	109.96	110.10	110.60	101.56
Euro	92.30	92.19	93.30	87.84
100 Yen	56.80	56.69	58.81	55.86

Indian markets

- Indian equities increased on Tuesday, as a state's election results brought optimism in the domestic market.
- Meanwhile, investors were awaiting the RBI's policy decision, due tomorrow.
- The top gainers were Trent, Bharat Electronics Ltd, Adani Enterprises, Adani Ports and Mahindra & Mahindra, up 3.45-7.95%.
- The top losers were SBI Life Insurance, Tata Steel, Titan Company, Bajaj Finserv and JSW Steel, down 2.02-3.35%.

Indian debt

- The interbank call money rate ended higher at 6.40% on Tuesday compared to 5.75% on Monday.
- Government bond prices ended higher on Tuesday on reports of inclusion of domestic bond in FTSE Russell's emerging market debt index.
- Meanwhile, investors also look forward to RBI's interest rate decision due on Wednesday.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended lower at 6.81% on Tuesday compared to 6.83% on Monday.

Indian Rupee

- The rupee ended marginally higher against the US dollar on Tuesday due to weak dollar index.
- However, these gains were capped due to rise in oil prices and increased foreign fund outflows.

Regulatory

- Sebi proposed that stock exchanges and other market infrastructure institutions frame their own policy for sharing data for the purpose of research to promote data democratisation, data privacy and data accountability.
- Sebi directed Alternative Investment Funds (AIFs) and their managers to exercise specific due diligence with respect to investors and investments in a bid to prevent circumvention of various laws and ensure compliance with regulatory frameworks.
- Sebi proposed a new data-sharing framework for intermediaries and other data sources.

Economy and Government

- India aims to enhance bilateral ties Maldives by providing significant financial support, launching the Rupay card, and strengthening defence cooperation.
- The Asian Development Bank approved a \$42 million loan for coastal and riverbank protection in Maharashtra.
- The government will set up 10 new ESIC medical colleges and extend the unemployment allowance scheme for ESI Corporation members until June 2026.
- The Centre set up a panel to address air pollution in Indo-Gangetic Plain.
- Finance Minister Nirmala Sitharaman asked the scheduled commercial banks to avoid engaging in long-term, high-risk funding and instead concentrate on mobilising deposits, retail lending, and supporting medium-term projects to prevent a recurrence of the non-performing assets (NPA) crisis caused by asset-liability mismatches.

Domestic Debt Market Indicators

Instrument	08- Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.40%	5.75%	6.25%	5.75%	5.50%	6.20%
3-Month T-Bill	6.44%	6.46%	6.66%	6.73%	6.83%	6.84%
6-Month T-Bill	6.52%	6.52%	6.70%	6.86%	7.13%	7.08%
1-year T-Bill	6.55%	6.55%	6.75%	6.92%	7.18%	7.11%
3-Month CD	7.10%	7.24%	7.26%	7.12%	7.00%	7.10%
6-Month CD	7.44%	7.43%	7.51%	7.40%	7.37%	7.40%
1-year CD	7.54%	7.58%	7.66%	7.62%	7.60%	7.50%
3-Month CP	7.55%	7.52%	7.64%	7.75%	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	6.58%	6.59%	6.73%	6.91%	7.14%	7.15%
3-year Gilt	6.68%	6.71%	6.73%	6.95%	7.16%	7.36%
5-year Gilt	6.73%	6.76%	6.75%	6.99%	7.19%	7.39%
1-year AAA	7.67%	7.67%	7.65%	7.68%	7.70%	7.50%
3-year AAA	7.49%	7.49%	7.58%	7.62%	7.70%	7.62%
5-year AAA	7.34%	7.34%	7.48%	7.55%	7.70%	7.62%
10-year G-sec	6.81%	6.85%	6.85%	6.99%	7.31%	7.34%
Net LAF (Rs Cr)	157431	202222	235315	77263	104121	2761
Forex reserves (\$ bn)	704.89	692.30	683.99	652.00	578.78	586.91

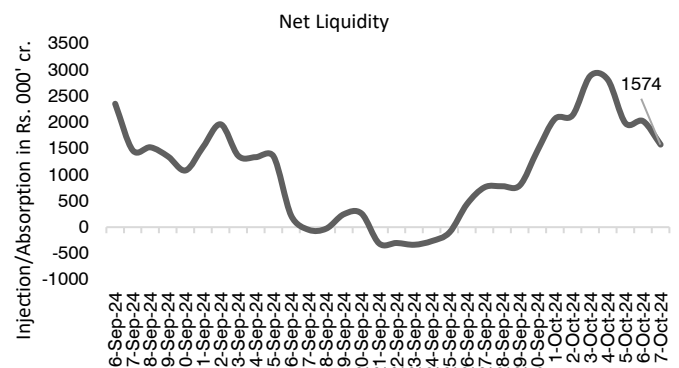
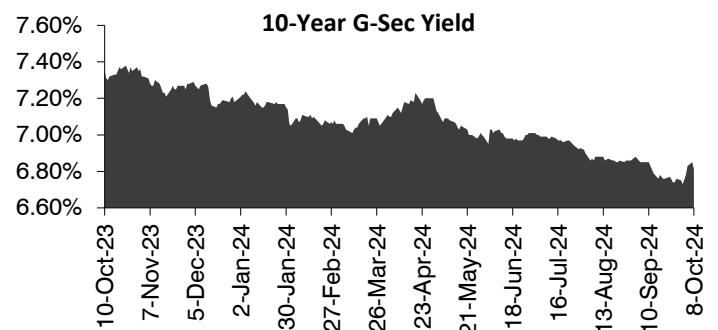
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.52	7.61	8.35	8.40	9.69	10.09
1 Year	6.58	7.67	8.41	8.46	9.75	10.15
3 Year	6.68	7.49	8.23	8.28	9.57	9.97
5 Year	6.73	7.34	8.19	8.24	9.53	9.93
10 Year	6.81	7.21	8.06	8.11	9.40	9.80

Rs. Cr (Debt)	FII Inv 03-Oct	MF Inv 04-Oct
Buy	82	10,949
Sell	1,224	7,911
Net	-1,142	3,038
Net (MTD)	-2,124	8,168
Net (YTD)	104,355	-247,515

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

- FTSE Russell to include India's sovereign bonds in its Emerging Markets Government Bond Index (EMGBI) from September 2025.
- Hyundai Motors India to raise Rs 8,315 crore via anchor bidding on October 14.
- Embassy REIT raised Rs 2,000 crore debt at a 7.95% interest rate
- Indian Railway Finance Corporation received board's approval for financing up to Rs 700 crore under the finance lease for 20 BOBR rakes procured under the General-Purpose Wagon Investment Scheme (GPWIS) of the Ministry of Railways for NTPC.
- Zinka Logistics Solutions has received final observation from SEBI to raise funds worth Rs 550 cr through an initial public offering (IPO).
- Edelweiss Financial Services announced a public issue of Rs 200 crore in Secured Redeemable Non-Convertible Debentures (NCDs).



Global market indices	08- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42080.37	0.30	4.30	26.47	25.96
Nikkei 225	38937.54	-1.00	7.00	38.86	25.63
FTSE	8190.61	-1.36	0.11	7.32	9.29
Hang Seng	20926.79	-9.41	19.96	2.58	19.68
Taiwan	22611.39	-0.40	5.49	42.50	36.87

Global debt	08- Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.04	4.03	3.72	4.28	3.49	4.04
UK 10-Year (%)	4.19	4.21	3.89	4.12	3.49	4.19
German 10-Year (%)	2.25	2.25	2.17	2.52	2.30	2.25
Japan 10-Year (%)	0.93	0.93	0.86	1.09	0.33	0.93

Domestic	08- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	75726	-0.27	5.28	26.74	33.94
Silver (Rs / Kg)	90412	-1.66	8.49	26.31	34.75
Aluminium (Rs / Kg)	239	-1.59	7.52	12.37	15.86
Copper (Rs / kg)	847	-0.85	7.12	8.87	21.03
Lead (Rs / kg)	195	1.48	0.90	2.57	0.00
Zinc (Rs /Kg)	286	-2.14	8.68	10.21	26.94
Nickel (Rs / kg)	1488	-1.88	9.48	-25.62	-6.12

Global	08- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2643.30	-0.33	5.00	-0.33	44.19
Silver (oz/\$)	3165.00	-1.65	9.71	-1.65	46.46
Brent (\$/bbl)	77.18	-4.63	8.61	-4.63	-8.75
NYMEX crude (\$/bbl)	73.57	-4.63	8.72	-4.63	-11.14

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 ended higher on Tuesday, led by gains in tech stocks while investors waiting for inflation data and the third quarter earnings results.
- 10-year US bond yield ended almost flat at 4.04%.
- FTSE index ended lower on Tuesday led by losses in miner stocks after China held off on economic stimulus measures.
- Asian markets were trading mixed at 8.30 AM.
- US NFIB Business Optimism Index increased to 91.5 in September, from 91.2 in August.
- US trade deficit narrowed to \$70.4 bn in August, the lowest in five months, from an upwardly revised \$78.9 bn in July.

Commodity

- Crude oil prices fell \$3.57 to \$73.57 a barrel on the NYMEX amid supply concerns following escalated tensions in the Middle East.
- Domestic gold prices ended lower tracking weak global cues as employment data lowers expectations of rate cut.

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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