



Domestic Market Performance

Indian market indices	29- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24467	0.52	-6.54	40.94	28.45
BSE Sensex	80369	0.45	-6.08	36.24	26.00
BSE 100	25788	0.55	-6.86	46.51	32.16
BSE 200	11226	0.61	-6.98	51.93	34.69
BSE 500	35922	0.63	-6.98	55.10	35.31
BSE SmallCap	53290	0.71	-6.66	97.68	44.46
BSE MidCap	46104	0.74	-6.84	91.58	48.18
BSE LargeCap	9497	0.58	-7.08	44.24	31.34
Sectoral indices					
BSE IT	41766	-0.50	-2.40	46.66	34.43
BSE Oil & Gas	27631	0.18	-13.37	58.95	53.03
BSE FMCG	21578	0.09	-9.68	30.88	16.26
BSE Auto	53728	-1.52	-13.67	90.21	46.33
BSE Bankex	59669	2.20	-2.42	29.63	23.42
BSE Teck	19227	-0.81	-3.43	48.15	37.75
BSE Capital Goods	67272	1.28	-8.73	95.73	46.99
BSE Consumer Durable	61977	0.95	-8.78	64.71	40.70

Turnover (Rs Cr)	29- Oct	28- Oct
BSE Cash	6062	7444
NSE Cash	103953	104980
NSE F&O	46843704	24747567

Rs. Cr (Equity)	FII Inv 28-Oct	MF Inv 25- Oct	DII Inv 29- Oct
Buy	14,100	12,037	12,824
Sell	16,209	8,784	12,094
Net	-2,109	3,253	730
Net (MTD)	-84,500	83,176	99,222
Net (YTD)	7,587	355,070	441,284

	29- Oct	1Day	Month ago	Year ago
USD	84.07	84.07	83.70	83.24
GBP	109.13	109.07	112.02	101.03
Euro	90.96	90.91	93.41	87.95
100 Yen	54.80	55.00	58.47	55.49

Indian markets

- Indian equities ended higher on Tuesday supported by gains in banking and financial stocks.
- The top gainers were SBI, Bharat Electricals, Eicher Motors, SBI Life Insurance and HDFC Life, up 3.36-5.13%.
- The top losers were Tata Motors, Maruti Suzuki, Hero MotoCorp, Dr Reddy's Labs and Cipla, down 1.70-4.06%.

Indian debt

- The interbank call money rate ended higher at 6.50% on Tuesday compared to 6.25% on Monday.
- Government bond prices closed marginally higher on Tuesday due to a short covering at a lower level.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed lower at 6.86% on Tuesday compared to 6.87% on Monday.

Indian Rupee

- The rupee closed almost flat against the US dollar on Tuesday, as gains due to ease in crude oil prices were cut short due to persistent foreign fund outflows.

Regulatory

- The Telecom Regulatory Authority of India (Trai) extended the deadline for implementing a traceability requirement on commercial messages, including one-time passwords (OTPs), to December 1, 2024.

Economy and Government

- According to the latest data released by the Reserve Bank of India (RBI), the domestic holding of gold reserves increased to 60% of total holdings as of September 30, up from 50% at the end of March.
- Prime Minister Narendra Modi virtually inaugurated and laid foundation stones for several health projects in Madhya Pradesh including medical colleges and AIIM'S' new administrative block in Bhopal.
- Prime Minister Narendra Modi asserted that the government is working to create a system that gives opportunity to every youngster and allows the youth to fulfil their aspirations.
- Prime Minister Narendra Modi extended the Ayushman Bharat health insurance scheme (AB PM-JAY) to all senior citizens aged 70 years and above, aiming to bolster India's healthcare infrastructure.
- Prime Minster Narendra Modi will visit Gujarat on October 30-31 during which he will inaugurate and lay the foundation stone of various development projects worth over Rs 280 crore.
- The government urged the companies to reduce prices of three anti-cancer drugs to pass on the benefit of customs duty exemption and GST reduction to the consumers.

Domestic Debt Market Indicators

Instrument	29- Oct	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.50%	6.25%	6.50%	6.25%	5.50%	6.45%
3-Month T-Bill	6.53%	6.51%	6.51%	6.62%	6.83%	6.92%
6-Month T-Bill	6.59%	6.59%	6.56%	6.79%	7.13%	7.12%
1-year T-Bill	6.59%	6.59%	6.57%	6.79%	7.18%	7.14%
3-Month CD	7.20%	7.22%	7.24%	7.14%	7.00%	7.22%
6-Month CD	7.40%	7.40%	7.47%	7.47%	7.37%	7.47%
1-year CD	7.50%	7.50%	7.62%	7.60%	7.60%	7.70%
3-Month CP	7.52%	7.50%	7.56%	7.70%	7.35%	7.70%
6-Month CP	7.75%	7.75%	7.85%	7.88%	7.71%	7.88%
1-year CP	7.85%	7.85%	7.90%	7.91%	7.90%	7.95%
1-year Gilt	6.64%	6.66%	6.67%	6.81%	7.14%	7.16%
3-year Gilt	6.75%	6.76%	6.69%	6.83%	7.16%	7.34%
5-year Gilt	6.77%	6.78%	6.67%	6.84%	7.19%	7.35%
1-year AAA	7.57%	7.57%	7.62%	7.64%	7.70%	7.65%
3-year AAA	7.37%	7.37%	7.44%	7.58%	7.70%	7.72%
5-year AAA	7.32%	7.32%	7.33%	7.52%	7.70%	7.72%
10-year G-sec	6.85%	6.86%	6.76%	6.92%	7.31%	7.35%
Net LAF (Rs Cr)	84983	63977	76155	114206	104121	-94479
Forex reserves (\$ bn)	688.27	690.43	692.30	670.86	578.78	583.53

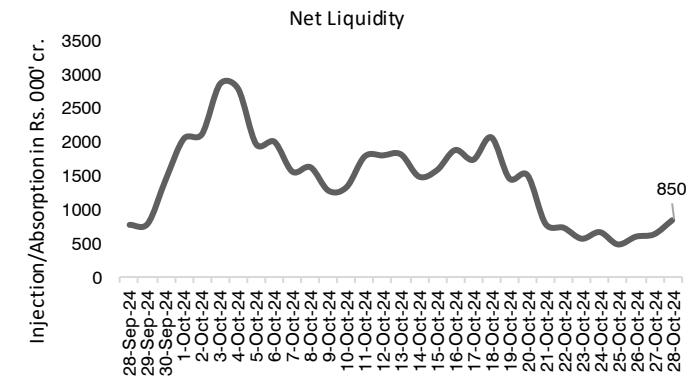
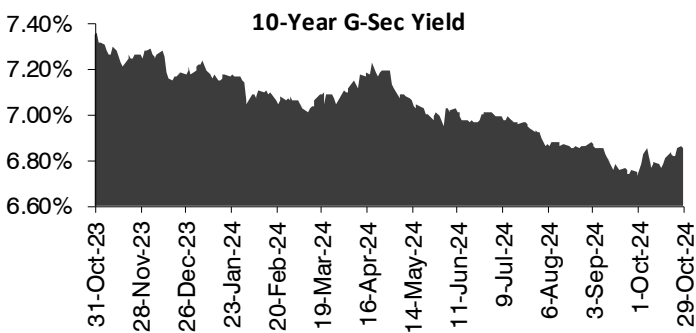
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.59	7.53	8.27	8.32	9.61	10.01
1 Year	6.64	7.57	8.31	8.36	9.65	10.05
3 Year	6.75	7.37	8.11	8.16	9.45	9.85
5 Year	6.77	7.32	8.17	8.22	9.51	9.91
10 Year	6.85	7.22	8.07	8.12	9.41	9.81

Rs. Cr (Debt)	FII Inv 28-Oct	MF Inv 25-Oct
Buy	188	11,581
Sell	333	14,846
Net	-145	-3,266
Net (MTD)	-5,043	-16,337
Net (YTD)	101,437	-272,020

Economic Indicators	Latest	Quarter	Year Ago
CPI	5.49% (Sep-24)	5.08% (Jun-24)	5.02% (Sep-23)
WPI	1.84% (Sep-24)	3.36% (Jun-24)	-0.26% (Sep-23)
IIP	-0.1% (Aug-24)	5.9% (May-24)	10.9% (Aug-23)
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)
India Manufacturing PMI	57.4 (Oct-24)	58.1 (Jul-24)	55.5 (Oct-23)
India Service PMI	57.9 (Oct-24)	60.3 (Jul-24)	58.4 (Oct-23)

Capital markets

- Swiggy filed for an Rs 11,300 crore Initial Public Offering (IPO) with India's Securities and Exchange Board of India (Sebi).
- Aegis Vopak Terminals' (AVTL) board approved a preferential issue up to an amount aggregating to Rs 800 crore on a private placement basis, as well as an initial public offering (IPO) worth around Rs 4,000 crore.
- Zinc raised \$25.5 million in seed funding, led by Nexus Venture Partners, with participation from Quona Capital, EDBI, Global Ventures, and Saison Capital.
- Finova Capital, raised \$135 mn in a Series E funding round from investors including Avataar Venture Partners, Sofina, Madison India Capital, and Norwest Venture Partners.



Global market indices	29- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42233.05	-0.36	-0.19	26.92	30.28
Nikkei 225	38903.68	0.77	-2.32	38.74	25.53
FTSE	8219.61	-0.80	-1.22	7.70	12.73
Hang Seng	20701.14	0.49	0.33	1.48	18.98
Taiwan	22926.59	-1.17	0.45	44.48	42.10

Global debt	29- Oct	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.28	4.28	3.75	4.17	3.49	4.85
UK 10-Year (%)	4.32	4.26	3.98	4.05	3.49	4.59
German 10-Year (%)	2.33	2.29	2.14	2.36	2.30	2.83
Japan 10-Year (%)	0.97	0.98	0.85	1.02	0.33	0.87

Domestic	29- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	78745	0.64	4.10	31.79	29.46
Silver (Rs / Kg)	97873	1.86	7.03	36.73	38.03
Aluminium (Rs / Kg)	244	1.16	1.88	14.56	18.95
Copper (Rs / kg)	830	0.42	-3.32	6.66	18.33
Lead (Rs / kg)	184	-0.38	-4.17	-3.41	-4.81
Zinc (Rs /Kg)	297	3.34	4.74	14.53	33.54
Nickel (Rs / kg)	1363	-0.42	-3.44	-31.85	-12.61

Global	29- Oct	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2742.88	0.03	3.18	0.03	38.22
Silver (oz/\$)	3379.00	0.48	6.83	0.48	47.94
Brent (\$/bbl)	71.12	-0.42	-1.19	-0.42	-21.40
NYMEX crude (\$/bbl)	67.21	-0.25	-1.42	-0.25	-21.43

Upcoming market indicators

Date	Indicator	Previous
October 30	US GDP Growth Rate QoQ Flash Q3	3%
October 30	US ADP Employment Changes, October	143,000
October 30	Eurozone GDP Growth Rate QoQ Flash Q3	0.2%
October 31	Eurozone Inflation Rate YoY Flash, October	1.7%
October 31	Japan BoJ Interest Rate Decision	0.25%

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 mixed on Tuesday as Nasdaq gained boosted by the technology sector while Dow Jones dipped as investors reviewed the earnings report and awaited Alphabet's post market results.
- 10-year US bond yield ended flat at 4.28%.
- FTSE index ended lower on Tuesday led by losses in the energy sector while investors awaited the upcoming budget announcement.
- Asian markets were trading lower at 8.30 AM.
- US JOLTs Job Openings fell by 418,000 to 7.443 mn in September, from a downwardly revised 7.861 mn in August.
- US Case Shiller Home Price Index increased 5.2% on year in August compared to a 5.9% rise in July.
- US House Price Index increased 4.2% in August compared to revised 4.7% in July.
- US CB Consumer Confidence rose to 108.7 in October, from a revised 99.2 in September.
- US Dallas Fed Services Index rose to 2 in October, from -2.6 in the previous month.

Commodity

- Crude oil prices fell 17 cents to \$67.21 a barrel on the NYMEX on easing supply concerns amid resolving geopolitical tensions.
- Domestic gold prices ended higher on festive buying in domestic market.

Forthcoming results

Date	Company
Oct 30	Larsen & Toubro Ltd.
Oct 30	Tata Power Company Ltd.
Oct 30	Dabur India Ltd.

	Indicators	Sep-24	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24	Dec-23
Debt Indicators	Currency in circulation (Rs billion)	34,994	35,231	35,600	35,814	35,792	35,455	34,849	34,342	33,902	33,636
	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	6.75%	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%	7.18%
	Call rate	6.24%	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%	6.25%
	Forex reserves (\$ billion; mthly. avg.)	689	674	662	653	644	644	633	618	619	609
Economy	GDP	NA	NA	NA	6.70%			7.80%			8.60%
	Fiscal deficit (Rs billion)	NA	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24	756.94
	IIP, %y/y	NA	NA	4.80%	4.20%	5.90%	5.00%	5.40%	5.60%	4.20%	4.40%
	Exports, \$ billion	34.58	34.71	33.98	35.2	38.13	34.99	41.68	41.4	36.92	38.45
	Imports, \$ billion	55.36	64.36	57.48	56.18	61.91	54.09	57.28	60.11	54.41	58.25
	Manufacturing PMI	56.5	57.5	58.1	58.3	57.5	58.8	59.1	56.9	56.5	54.9
	Services PMI	57.7	60.9	60.3	60.5	60.2	60.8	61.2	60.6	61.8	59
	GST collections (Rs crore)	173240	174,962	182,075	173,813	172,739	210,267	178,484	168,337	172,129	164,882
	India crude oil import (mbpd)		19.10	19.44	18.45	21.75	21.44	20.69	18.01	21.39	19.54
Sector update	Auto – Passenger vehicles	NA	-2.2%	-2.30%	4.30%	20.50%	35.40%	9.74%	-5.40%	-1.32%	3.70%
	Auto – Two-wheelers	NA	9.6%	12.45%	19.51%	1.09%	22.78%	15.27%	34.60%	26.20%	16.00%
	Auto – Commercial vehicles	NA	-11.63%	-12.29%	-8.30%	-0.10%	14.40%	-7.74%	-4.20%	-4.40%	-10.00%
	Auto – Tractors	NA	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%	-17.00%	-15.30%	-19.80%
	Banks – Deposit growth	11.60%	10.90%	11.30%	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%	13.10%
	Banks – Credit growth	13.00%	13.50%	13.90%	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%	20.30%
	Infra – Coal	NA	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%	10.70%
	Infra – Electricity	NA	-5.00%	7.00%	7.70%	12.80%	9.40%	8.00%	7.50%	5.20%	1.20%
	Infra – Steel	NA	4.50%	7.20%	2.70%	7.60%	7.10%	5.50%	9.10%	7.00%	7.60%
	Infra – Cement	NA	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%	3.80%

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