



Domestic Market Performance

Indian market indices	06- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24484	1.12	-2.12	41.04	26.13
BSE Sensex	80378	1.13	-1.60	36.25	23.74
BSE 100	25868	1.35	-2.35	46.96	29.71
BSE 200	11287	1.51	-2.35	52.76	32.44
BSE 500	36271	1.56	-2.21	56.61	33.50
BSE SmallCap	56008	1.96	0.11	107.77	47.53
BSE MidCap	46944	2.28	-2.01	95.07	46.60
BSE LargeCap	9530	1.37	-2.48	44.74	29.01
Sectoral indices					
BSE IT	42082	4.04	-0.66	47.76	33.21
BSE Oil & Gas	28065	2.81	-8.01	61.45	48.02
BSE FMCG	21591	0.58	-6.18	30.96	14.64
BSE Auto	54727	1.22	-6.51	93.75	49.15
BSE Bankex	59653	0.22	2.16	29.59	20.95
BSE Teck	19176	3.37	-1.91	47.76	34.86
BSE Capital Goods	70472	2.68	0.24	105.04	49.93
BSE Consumer Durable	61880	2.06	-6.04	64.45	37.12

Turnover (Rs Cr)	06- Nov	05- Nov
BSE Cash	8797	5944
NSE Cash	115422	99926
NSE F&O	59372288	46142367

Rs. Cr (Equity)	FII Inv 05- Nov	MF Inv 04- Nov	DII Inv 06- Nov
Buy	12,785	9,402	16,062
Sell	14,524	8,011	11,172
Net	-1,739	1,391	4,889
Net (MTD)	-10,645	990	10,479
Net (YTD)	-6,148	361,795	459,796

	06- Nov	1Day	Month ago	Year ago
USD	84.28	84.10	83.97	83.22
GBP	108.73	109.20	110.56	103.17
Euro	90.64	91.62	92.58	89.43
100 Yen	54.70	55.26	57.33	55.62

Indian markets

- Indian equities ended higher on Wednesday boosted by IT stocks after the US presidential election results.
- The top gainers were Bharat Electronics, Adani Enterprises, TCS, Infosys and Tech Mahindra, up 3.73-5.41%.
- The top losers were SBI Life Insurance, Titan Company, HDFC Life, IndusInd Bank and HUL, down 0.82-1.79%.

Indian debt

- The interbank call money rate closed higher at 6.35% on Wednesday compared to 5.95% on Tuesday.
- Government bond prices closed flat on Wednesday as investors remained on the sidelines ahead of the Fed policy meet.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed flat at 6.83% on Wednesday.
- Meanwhile, the new 10-year benchmark 06.79% GS 2034 paper closed at 6.79% on Wednesday.

Indian Rupee

- The rupee hit a record low against the US dollar on Wednesday ahead of the US Fed policy meet and persistent outflows of foreign fund.

Regulatory

- The Reserve Bank made changes to the Know Your Customer (KYC) norms to align them with recent amendments carried out in the Prevention of Money Laundering (Maintenance of Records) Rules and revised certain existing instructions.
- The Insolvency and Bankruptcy Board of India (IBBI) proposed a voluntary mediation mechanism for operational creditors before filing insolvency applications under the IBC norms.

Economy and Government

- India's HSBC final Services Purchasing Managers' Index rose to 58.5 in October from September's 57.7 while composite PMI rose 59.1 from September's 58.3.
- The government launched the PM-Vidyalaxmi scheme to provide financial assistance to meritorious students pursuing higher education.
- Government of India and the Asian Development Bank signed a \$ 200 million loan to help upgrade water supply, sanitation, mobility, and other urban services in Uttarakhand.
- Science and Technology Minister Jitendra Singh said India will launch the European Space Agency's Proba-3 mission early next month from the spaceport at Sriharikota.
- Niti Aayog member VK Paul said that the government is working towards strengthening India's primary healthcare system and taking it to the next level as a robust health system will form the basis of a Viksit Bharat.
- The Ministry of Environment, Forest, and Climate Change (MoEFCC) introduced new rules for conducting inquiries and imposing penalties on polluters.

Domestic Debt Market Indicators

Instrument	06- Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.35%	5.95%	6.25%	5.75%	5.50%	5.50%
3-Month T-Bill	6.45%	6.46%	6.47%	6.61%	6.83%	6.91%
6-Month T-Bill	6.59%	6.58%	6.54%	6.72%	7.13%	7.05%
1-year T-Bill	6.58%	6.56%	6.54%	6.71%	7.18%	7.13%
3-Month CD	7.18%	7.14%	7.20%	7.16%	7.00%	7.23%
6-Month CD	7.40%	7.38%	7.43%	7.48%	7.37%	7.48%
1-year CD	7.50%	7.50%	7.58%	7.60%	7.60%	7.70%
3-Month CP	7.51%	7.55%	7.60%	7.60%	7.35%	7.68%
6-Month CP	7.80%	7.80%	7.75%	7.93%	7.71%	7.93%
1-year CP	7.85%	7.85%	7.80%	7.91%	7.90%	8.00%
1-year Gilt	6.72%	6.72%	6.59%	6.72%	7.14%	7.18%
3-year Gilt	6.73%	6.73%	6.70%	6.79%	7.16%	7.26%
5-year Gilt	6.77%	6.76%	6.74%	6.79%	7.19%	7.32%
1-year AAA	7.59%	7.59%	7.66%	7.63%	7.70%	7.62%
3-year AAA	7.37%	7.37%	7.48%	7.57%	7.70%	7.69%
5-year AAA	7.32%	7.32%	7.33%	7.51%	7.70%	7.69%
10-year G-sec	6.80%	6.80%	6.83%	6.87%	7.31%	7.31%
Net LAF (Rs Cr)	283861	275989	281101	278760	104121	-4686
Forex reserves (\$ bn)	684.81	688.27	704.89	667.39	578.78	586.11

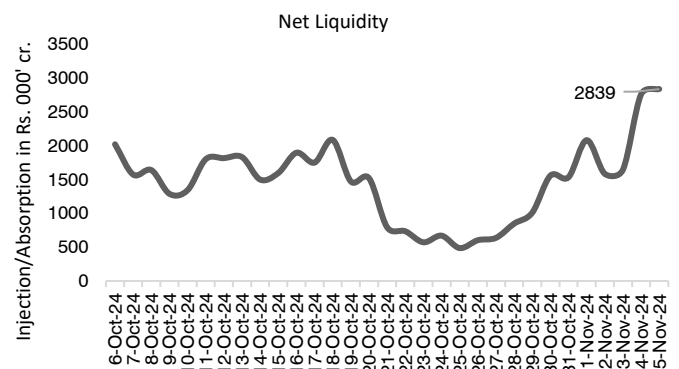
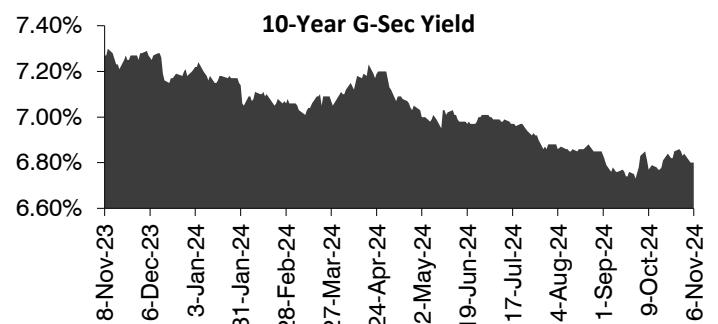
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.59	7.53	8.27	8.32	9.61	10.01
1 Year	6.72	7.59	8.33	8.38	9.67	10.07
3 Year	6.73	7.37	8.11	8.16	9.45	9.85
5 Year	6.77	7.32	8.17	8.22	9.51	9.91
10 Year	6.80	7.19	8.04	8.09	9.38	9.78

Rs. Cr (Debt)	FII Inv 05- Nov	MF Inv 04- Nov
Buy	1,652	8,184
Sell	613	7,991
Net	1,039	193
Net (MTD)	982	193
Net (YTD)	102,908	-277,018

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	57.5 (Oct-24)	58.1 (Jul-24)	55.5 (Oct-23)
India Service PMI	58.5 (Oct-24)	60.3 (Jul-24)	58.4 (Oct-23)

Capital markets

- Rail Vikas Nigam (RVNL) emerged as the lowest bidder in two projects worth around Rs 5,608 crore (Rs 5,008 crore and Rs 613 crore respectively).
- Polycab emerged as the lowest bidder (L1) for the work worth Rs 4,099 for developing the middle mile network of Bharat Net.
- Rubicon Research, Sai Life Sciences, Sanathan Textiles and Metalman Auto have received Sebi's go-ahead to raise at least Rs 3,000 crore collectively through Initial Public Offerings (IPOs)
- Inflexor announced the first close of its targeted Rs 350-crore Opportunities Fund at Rs 280 crore.



Global market indices	06- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43729.93	3.57	3.25	31.42	28.26
Nikkei 225	39480.67	2.61	2.19	40.79	20.70
FTSE	8166.68	-0.07	-1.38	7.01	10.10
Hang Seng	20538.38	-2.23	-9.67	0.68	14.31
Taiwan	23217.38	0.48	4.10	46.32	39.45

Global debt	06-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.42	4.26	3.98	3.90	3.49	4.66
UK 10-Year (%)	4.56	4.53	4.13	3.92	3.49	4.41
German 10-Year (%)	2.39	2.43	2.21	2.18	2.30	2.74
Japan 10-Year (%)	0.99	0.93	0.90	0.89	0.33	0.87

Domestic	06- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	78136	-0.55	2.86	30.77	27.98
Silver (Rs / Kg)	92901	-1.44	0.76	29.78	28.96
Aluminium (Rs / Kg)	244	0.72	0.10	14.61	15.72
Copper (Rs / kg)	828	-1.84	-3.25	6.34	15.71
Lead (Rs / kg)	185	0.08	-5.85	-2.81	-2.89
Zinc (Rs /Kg)	286	-1.19	-1.55	10.33	25.38
Nickel (Rs / kg)	1360	-0.46	-9.83	-32.02	-11.79

Global	06- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2740.24	0.09	3.18	0.09	37.51
Silver (oz/\$)	3264.00	0.43	1.87	0.43	40.63
Brent (\$/bbl)	74.92	-0.81	-4.01	-0.81	-12.05
NYMEX crude (\$/bbl)	71.69	-0.42	-3.62	-0.42	-11.30

Upcoming market indicators

Date	Indicator	Previous
November 07	US Fed Interest Rate Decision	5%
November 07	UK BoE Interest Rate Decision	5%
November 09	China Inflation, October	0.4%
November 12	UK Unemployment Rate, September	4%
November 12	Eurozone Industrial Production, September	0.1%

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 Wednesday after the US presidential election and anticipated Federal Reserve rate cut.
- 10-year US bond yield ended higher at 4.42% following US presidential election results.
- FTSE index ended lower on Wednesday as declines in homebuilders and precious metal miners offset the response to the US elections results.
- Asian markets were trading higher at 8.30 AM.
- Eurozone HCOB Services PMI edged higher to 51.6 in October 2024 compared to 51.4 in September, while HCOB Composite PMI rose to 50 from 49.6.
- Eurozone PPI fell 3.4% on-year in August, following a 2.3% drop in July.
- UK S&P Global Construction PMI fell to 54.3 in October from 57.2 in September.

Commodity

- Crude oil prices fell 30 cents to \$71.69 a barrel on the NYMEX as a strong US dollar outweighed supply concerns.
- Domestic gold prices ended lower on profit booking at higher level.

Forthcoming results

Date	Company
7 Nov	Mahindra & Mahindra Ltd.
7 Nov	Trent Ltd.
8 Nov	State Bank of India
8 Nov	Life Insurance Corporation of India
8 Nov	Tata Motors Ltd.

	Indicators	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24
Debt Indicators	Currency in circulation (Rs billion)	35,042	34,994	35,231	35,600	35,814	35,792	35,455	34,849	34,342	33,902
	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	6.85%	6.75%	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%
	Call rate	5.75%	6.24%	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%
	Forex reserves (\$ billion; mthly. avg.)	NA	689	674	662	653	644	644	633	618	619
Economy	GDP	NA	NA	NA	NA	6.70%			7.80%		
	Fiscal deficit (Rs billion)	NA	NA	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24
	IIP, %y/y	NA	NA	NA	4.80%	4.20%	5.90%	5.00%	5.40%	5.60%	4.20%
	Exports, \$ billion	NA	34.58	34.71	33.98	35.2	38.13	34.99	41.68	41.4	36.92
	Imports, \$ billion	NA	55.36	64.36	57.48	56.18	61.91	54.09	57.28	60.11	54.41
	Manufacturing PMI	NA	56.5	57.5	58.1	58.3	57.5	58.8	59.1	56.9	56.5
	Services PMI	NA	57.7	60.9	60.3	60.5	60.2	60.8	61.2	60.6	61.8
	GST collections (Rs crore)	NA	173240	174,962	182,075	173,813	172,739	210,267	178,484	168,337	172,129
	India crude oil import (mbpd)	NA		19.10	19.44	18.45	21.75	21.44	20.69	18.01	21.39
Sector update	Auto – Passenger vehicles	NA	-3.1%	-2.8%	-1.74%	4.30%	20.50%	35.40%	9.74%	-5.40%	-1.32%
	Auto – Two-wheelers	NA	15.8%	9.6%	12.45%	21.30%	1.09%	22.78%	15.27%	34.60%	26.20%
	Auto – Commercial vehicles	NA	-22.02%	-	11.63%	-8.30%	-0.10%	14.40%	-7.74%	-4.20%	-4.40%
	Auto – Tractors	NA	3.7%	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%	-17.00%	-15.30%
	Banks – Deposit growth	NA	11.60%	10.90%	11.30%	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%
	Banks – Credit growth	NA	13.00%	13.50%	13.90%	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%
	Infra – Coal	NA	NA	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%
	Infra – Electricity	NA	NA	-5.00%	7.00%	7.70%	12.80%	9.40%	8.00%	7.50%	5.20%
	Infra – Steel	NA	NA	4.50%	7.20%	2.70%	7.60%	7.10%	5.50%	9.10%	7.00%
	Infra – Cement	NA	NA	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully