INGENETUS

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AMFI REGISTERED MUTUAL FUND DISTRIBUTOR & SIF DISTRIBUTOR
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MONTHLY MARKET UPDATE

1st Oct, 2026 to 31st Oct, 2026

MARKET OVERVIEW

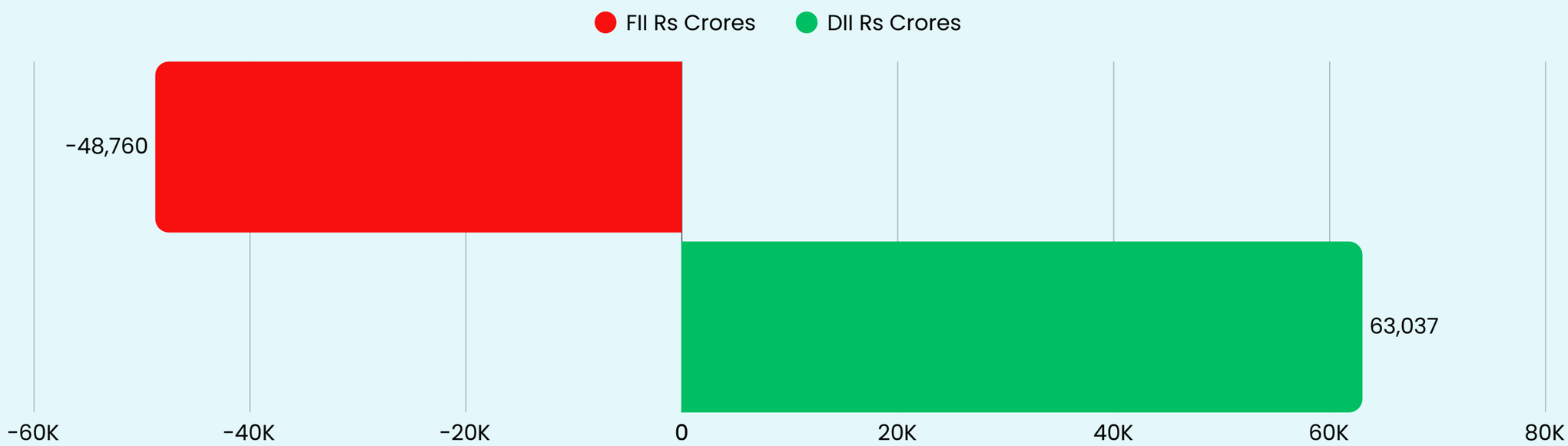
October Reprieve: IT Rally, RBI Action and Crude Pullback Offer Dalal Street a Breather

- Indian equities staged a meaningful recovery in October, with the Nifty 50 gaining ~1.91% and the Sensex rising over 1.5%, snapping a two-month losing streak as IT and banking heavyweights led the charge back into positive territory.
- The RBI delivered its first rate hike in nearly four years in October, while aggressive forex intervention helped the rupee post its best monthly gain since February, closing at 94.95 per dollar.
- The US Fed held rates steady at 3.75%–4%, but two dissents and rising odds of a December hike kept global sentiment cautious.
- The Jio Platforms IPO dominated October sentiment, with strong dollar inflows supporting the rupee and broader equity confidence even as Brent crude remained sticky above $100.

INDEX	MONTHLY RETURN	CLOSING PRICE
Nifty 50	1.91%	23,053
BSE Sensex	2.73%	74,459
Nifty 500	-0.80%	21,895
Nifty Midcap 150	-3.75%	21,047
Nifty Smallcap 250	-5.81%	16,764

INSTITUTIONAL INVESTMENT TRENDS

- FIIs pulled out ₹48,760 crore in October, reflecting sustained risk-off sentiment amid global headwinds.
- DIIs stepped up strongly with ₹63,037 crore in buying, more than offsetting FII outflows and cushioning the broader market.



SECTORAL HIGHLIGHTS

- Telecom Services (+17.41%) and Software & Services (+14.50%) were the only major outperformers, with the rest of the market broadly in the red.
- Commercial Services (-10.58%), Metals & Mining (-8.77%), and Fertilizers (-8.32%) led the decline, reflecting broad sectoral weakness across industrials and commodities.

Telecom Services +17.41%	Software & Services +14.50%	Media +5.60%	Hotels & Restaurants +3.54%	Pharma -1.09%	Banking & Finance -1.18%
Cement & Construction -1.40%	Hardware Technology -1.48%	Oil & Gas -2.02%	Retailing -2.17%	Transportation -2.58%	Utilities -2.66%
Realty -2.70%	Food, Bev. & Tobacco -3.18%	Automobiles & Auto Comp. -3.40%	FMCG -3.85%	Telecom-munication -3.89%	Textiles & Apparel -4.12%
Diversified -4.65%	Others -4.71%	Diversified Consumer -5.66%	General Industrials -5.70%	Consumer Durables -6.32%	Chemicals & Petrochem. -6.52%
Healthcare -6.80%	Forest Materials -7.10%	Fertilizers -8.32%	Metals & Mining -8.77%	Commercial Services -10.58%	

KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Oct- 2026	5.54%
INTEREST RATE	Daily	07 - Oct	5.50%
UNEMPLOYMENT RATE	Monthly	Sep-2026	5.00%
GDP	Yearly	2025	$3.8 Trillion
GDP Annual GROWTH RATE	Quarterly	June-2026	7.80%
GDP PER CAPITA	Yearly	2025	$2523
10-YEAR GOVERNMENT BOND YIELD	Daily	Oct- 2026	7.39%

GLOBAL EQUITY MARKET OVERVIEW

- Dow Jones (+1.93%) and DAX (+2.53%) led global gains, with Western markets showing resilience driven by positive investor sentiment.
- SSE Composite (-6.04%) and Hang Seng (-5.01%) were the biggest laggards, reflecting continued pressure on Chinese and Hong Kong equities.

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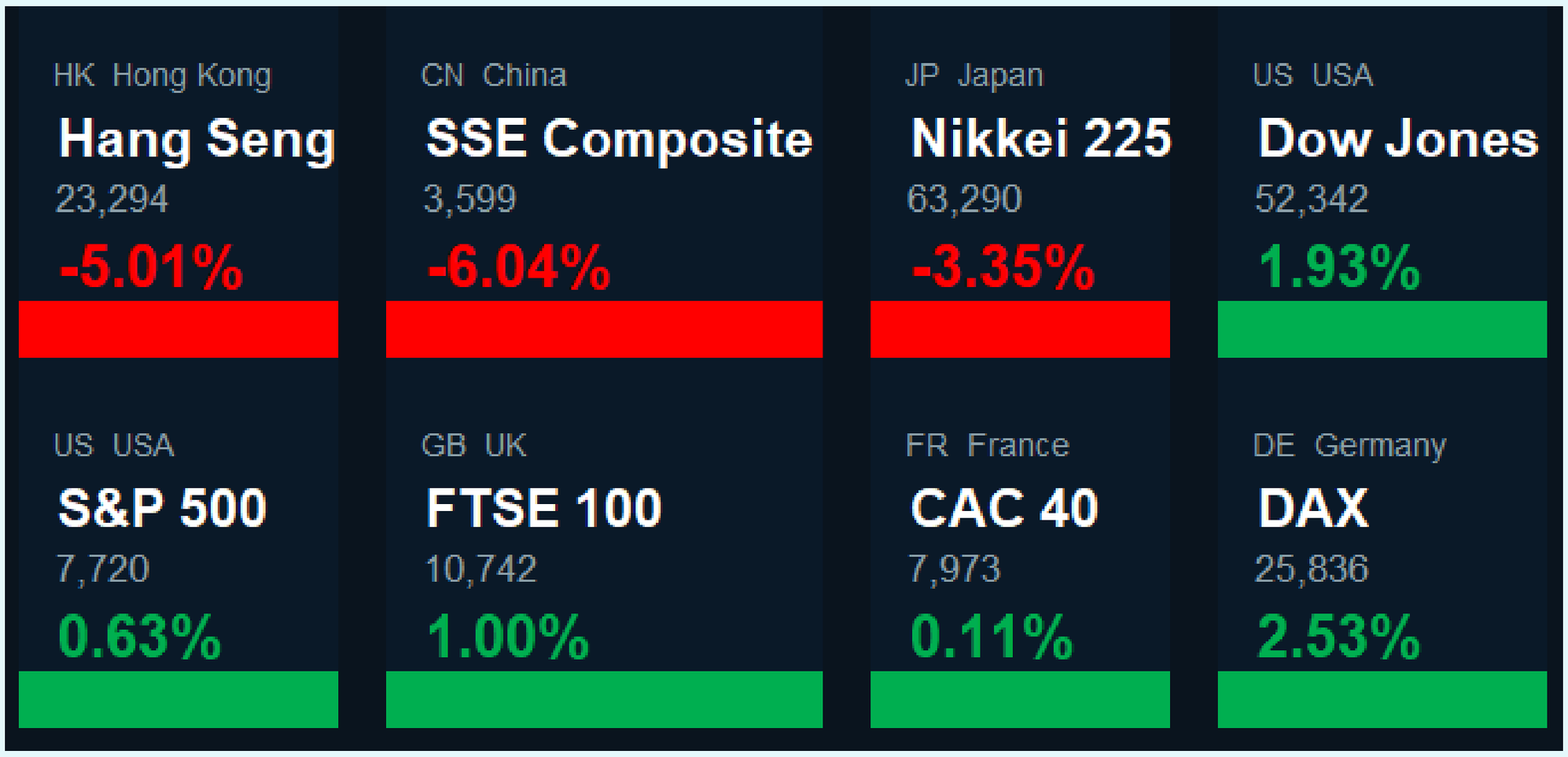

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