

Daily Market Monitor

August 05, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	4-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24723	0.64	-2.90	10.73	0.02
BSE Sensex	81019	0.52	-2.89	10.00	0.05
BSE 100	25916	0.72	-2.88	11.26	-0.90
BSE 200	11226	0.80	-2.90	11.15	-2.00
BSE 500	35890	0.82	-2.91	12.00	-2.34
BSE SmallCap	52972	0.76	-3.39	22.72	-3.03
BSE MidCap	45658	1.11	-2.47	16.11	-4.23
BSE LargeCap	9525	0.74	-2.86	9.72	-1.76
Sectoral indices					
BSE IT	34651	1.38	-9.57	-2.79	-14.72
BSE Oil & Gas	26403	0.45	-6.89	-4.49	-18.29
BSE FMCG	20649	-0.04	2.35	6.89	-7.74
BSE Auto	53162	1.54	-0.85	8.18	-8.25
BSE Bankex	61795	-0.02	-2.93	15.47	5.66
BSE Teck	17127	1.46	-9.09	6.30	-8.42
BSE Capital Goods	68506	0.97	-5.28	12.41	-6.77
BSE Consumer Durable	59949	1.29	-1.92	14.68	-0.16

Turnover (Rs Cr)	4-Aug	1-Aug
BSE Cash	6400	7812
NSE Cash	83320	94819
NSE F&O	11592547	12657676

Rs. Cr (Equity)	FII Inv 1-Aug	MF Inv 31-July	DII Inv 4-Aug
Buy	12,007	24,431	13,723
Sell	13,453	22,811	9,466
Net	-1,445	1,619	4,257
Net (MTD)	-1,445	47,019	6,975
Net (YTD)	-97,888	282,652	408,170

	4-Aug	1Day	Month ago	Year ago
USD	87.50	87.35	85.39	83.74
GBP	116.24	115.34	116.78	106.69
Euro	101.27	99.88	100.60	90.62
100 Yen	59.29	58.04	59.18	56.24

Indian markets

- Indian equity benchmarks ended higher on Monday due to gains in IT and metal stocks, amid hopes of a rate cut by the US Federal Reserve following weak July US jobs data, weak dollar index and lower crude oil prices.
- The top gainers were Hero MotoCorp, Tata Steel, Bharat Elec, Adani Ports and JSW Steel, up 2.73-5.20%.
- The top losers were Power Grid Corporation, HDFC Bank, ONGC, Apollo Hospital and ICICI Bank, down 0.57-1.13%.

Indian debt

- The interbank call money rate ended lower at 4.95% on Monday compared to 5.35% on Friday.
- Government bond prices ended higher on Monday due to falling US treasury yields and rising hopes for dovish signals from the RBI's policy meeting ahead.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.32% on Monday compared to 6.37% on Friday.

Indian Rupee

- The rupee ended lower against the US dollar on Monday due to worries over the impact of US tariffs on Indian exports and sustained foreign fund outflows.

Regulatory

- Securities and Exchange Board of India (SEBI) has come up with revised Norms for appointment of an independent third-party reviewer/certifier for green debt security.
- SEBI proposed relaxing the threshold for which companies need to seek shareholder approval for related-party transactions though a system based on the firm's annual turnover.
- SEBI proposed broadening the definition of 'strategic investor' under REIT and InvIT norms to include Qualified Institutional Buyers (QIBs) and certain Foreign Portfolio Investors (FPIs) in order to attract more institutional capital to these asset classes..

Economy and Government

- Gross Goods and Services Tax (GST) collections rose 7.5% on year to Rs 1.96 lakh crore in July.
- The Indian Postal Department plans to discontinue its Registered Post service from September 1, 2025.
- The government of Tamil Nadu signed deals with multiple companies for investments totalling around Rs 32,554 crore, creating close to 50,000 jobs in the southern districts of the state.

Domestic Debt Market Indicators

Instrument	4-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.35%	4.75%	5.85%	6.24%	6.10%
3-Month T-Bill	5.38%	5.40%	5.32%	5.89%	6.93%	6.63%
6-Month T-Bill	5.48%	5.50%	5.48%	5.93%	7.04%	6.75%
1-year T-Bill	5.47%	5.52%	5.53%	5.89%	7.07%	6.78%
3-Month CD	5.73%	5.73%	5.78%	6.52%	7.55%	7.18%
6-Month CD	6.00%	6.03%	6.00%	6.66%	7.37%	7.44%
1-year CD	6.22%	6.25%	6.20%	6.75%	7.62%	7.60%
3-Month CP	6.18%	6.18%	6.20%	6.80%	8.15%	7.64%
6-Month CP	6.36%	6.36%	6.40%	6.99%	7.71%	7.75%
1-year CP	6.65%	6.65%	6.60%	7.09%	8.10%	7.91%
1-year Gilt	5.57%	5.56%	5.57%	5.96%	7.14%	6.77%
3-year Gilt	5.84%	5.87%	5.83%	6.04%	7.16%	6.81%
5-year Gilt	6.07%	6.11%	6.06%	6.09%	7.05%	6.80%
1-year AAA	6.48%	6.50%	6.45%	6.97%	7.70%	7.64%
3-year AAA	6.66%	6.68%	6.63%	6.98%	7.70%	7.58%
5-year AAA	6.70%	6.72%	6.67%	6.99%	7.70%	7.52%
10-year G-sec	6.32%	6.37%	6.30%	6.36%	7.05%	6.90%
Net LAF (Rs Cr)	409620	286388	404417	157877	-73145	255687
Forex reserves (\$ bn)	698.19	695.49	702.78	688.13	642.49	667.39

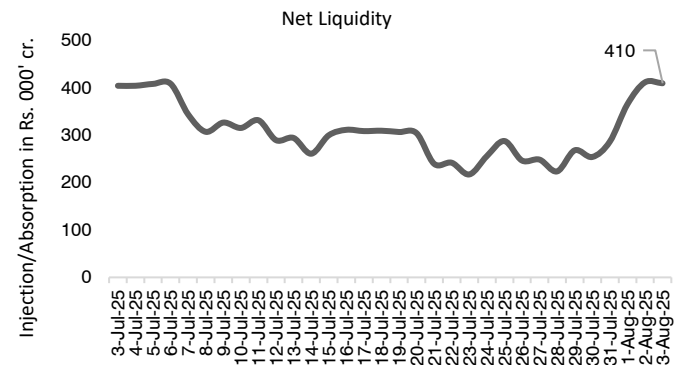
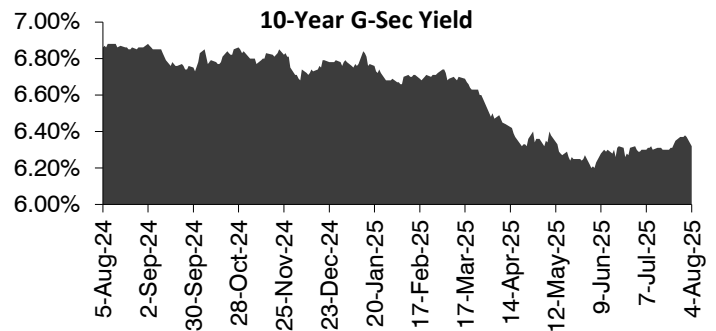
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.48	6.30	7.01	7.05	8.28	8.81
1 Year	5.57	6.48	7.19	7.23	8.46	8.99
3 Year	5.84	6.66	7.37	7.41	8.64	9.17
5 Year	6.07	6.70	7.51	7.54	8.78	9.31
10 Year	6.32	6.93	7.74	7.77	9.01	9.54

Rs. Cr (Debt)	FII Inv 1-Aug	MF Inv 31-July
Buy	2,476	6,596
Sell	522	9,902
Net	1,954	-3,306
Net (MTD)	74	-21,227
Net (YTD)	3,055	-348,162

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.10% (Jun-25)	3.34% (Mar-25)	5.08% (Jun-24)
WPI	-0.13% (Jun-25)	2.25% (Mar-25)	3.36% (Jun-24)
IIP	1.5% (Jun-25)	3.9% (Mar-25)	4.9% (Jun-24)
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)
India Manufacturing PMI	59.1 (Jul-25)	58.1 (Mar-25)	58.1 (Jul-24)
India Service PMI	59.2 (Jul-25)	58.5 (Mar-25)	60.3 (Jul-24)
Bank Credit Growth*	-0.44% (July 11, 2025)		1.54% (June 27, 2025)
Bank Deposit Growth*	-0.11% (July 11, 2025)		0.92% (June 27, 2025)

Capital markets

- JSW Cement has priced its Rs 3,600-crore initial public offering (IPO) between Rs 130 and Rs 147 per share.
- CleanMax raised Rs 400 crore from 360 One Asset Management to increase shareholding in the company in a pre-IPO funding completed last month.
- Jeh Aerospace raised \$11 million in a funding round led by venture-capital firm Elevation Capital, with existing backer General Catalyst participating.
- Mitigata raised \$5.9 million in Series A funding.



Global market indices	4-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44173.64	1.34	-0.72	10.97	11.16
Nikkei 225	40290.7	-1.25	1.21	0.31	12.20
FTSE	9128.3	0.66	3.46	14.78	11.67
Hang Seng	24733.45	0.92	3.42	49.52	45.96
Taiwan	23378.94	-0.24	3.69	16.04	8.05

Global debt	4-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.22	4.23	4.26	4.33	4.21	3.80
UK 10-Year (%)	4.51	4.52	4.55	4.50	3.98	3.83
German 10-Year (%)	2.63	2.68	2.57	2.52	2.29	2.16
Japan 10-Year (%)	1.51	1.56	1.44	1.27	0.71	0.93

Domestic	4-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100167	1.95	3.24	48.94	42.30
Silver (Rs / Kg)	111900	2.06	4.02	50.96	34.01
Aluminium (Rs / Kg)	253	0.98	1.36	21.68	18.74
Copper (Rs / kg)	889	0.65	-0.64	17.18	11.31
Lead (Rs / kg)	187	1.17	0.89	3.29	-2.71
Zinc (Rs /Kg)	267	0.96	2.65	22.53	4.66
Nickel (Rs / kg)	1340	0.75	0.50	-5.76	-2.44

Global	4-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3363.86	2.00	0.91	2.00	37.51
Silver (oz/\$)	3703.00	0.98	0.38	0.98	29.88
Brent (\$/bbl)	68.76	-1.31	0.67	-1.31	-10.48
NYMEX crude (\$/bbl)	66.29	-1.54	-1.06	-1.54	-9.83

Global markets

- Wall Street stocks closed higher on Monday on optimism over a possible rate cut in September following weak jobs data.
- 10-year US bond yield ended lower at 4.22% as investors assessed the impact of US tariff announcement on the economic growth.
- FTSE index closed higher on Monday, driven by gains in banking stocks as investors eyed a possible Bank of England rate cut.
- Asian markets were trading higher at 8.30 AM.
- US New orders manufactured goods fell 4.8% in June 2025 compared to a revised 8.3% surge in May 2025.
- China Caixin General Services PMI rose to 52.6 in July 2025 compared to 50.6 in June 2025 while the Composite PMI dipped to 50.8 from 51.3.
- Japan S&P Global Services PMI rose to 53.6 in July 2025, compared to 51.7 in June 2025 while Composite PMI edged up to 51.6 from 51.5.

Commodity

- Crude oil prices fell by \$1.04 to \$66.29 a barrel on the NYMEX as OPEC+ agreed to a major output hike for September and weak US fuel demand.
- Domestic gold prices ended higher due to weak dollar amid dismal jobs data.

Forthcoming results

Date	Company
5-Aug	Adani Ports and Special Economic Zone
5-Aug	Lupin
6-Aug	Bajaj Auto
6-Aug	Trent
6-Aug	Bajaj Holdings & Investment
6-Aug	Pidilite Industries

Upcoming market indicators

Date	Indicator	Previous
Aug 5	China Caixin Services PMI Jul	50.6
Aug 6	India RBI Interest Rate Decision	5.5%
Aug 7	US Nonfarm Productivity QoQ Prel Q2	-1.5%
Aug 9	China Inflation Rate, Jul	0.1%
Aug 12	US Inflation Rate, Jul	2.7%

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

*Note: Bank credit and deposit growth are calculated on fortnightly basis.

Indicators		June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24
Debt Indicators	Currency in circulation (Rs billion)	38427	38344	37762	36997	36444	35893	35643	35,589	35,103	34,994
	Repo rate	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%
	Call rate	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%
	Forex reserves (\$ billion; mthly. avg.)	698	689	682	656	638	629	648	666	694	688.744
	GDP	NA	NA	7.40%			6.40%			5.40%	
	Fiscal deficit (Rs billion)	NA	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7	2763.0	393.44
	IIP, %y/y	NA	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%	3.50%	3.10%
	Exports, \$ billion	NA	38.73	38.49	41.97	36.91	36.43	38.01	32.11	39.2	34.58
	Imports, \$ billion	NA	60.61	64.91	63.51	50.96	59.42	59.95	69.95	66.34	55.36
	Manufacturing PMI	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5	57.5	56.5
	Services PMI	60.7	58.8	58.7	58.5	59	56.5	59.3	58.4	58.5	57.7
	GST collections (Rs crore)	184597	201050	236716	196141	183646	195506	176857	182,269	187,346	173,240
	India crude oil import (mbpd)	NA	21.3	21.0	22.7	19.465	21.2	20.2	19.07	19.71	18.79
Sector update	Auto – Passenger vehicles	NA	-1.1%	5.9%	2.4%	2.4%	2.3%	9.8%	20.7%	14.9%	-1.0%
	Auto – Two-wheelers	NA	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%
	Auto – Commercial vehicles	NA	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%
	Auto – Tractors	NA	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%
	Infra – Coal	10.04%	10.00%	10.20%	10.60%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%
	Infra – Electricity	9.60%	9.80%	10.30%	11.80%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%
	Infra – Steel	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%
	Infra – Cement	-2.80%	-4.7%	1.7%	7.5%	3.6%	2.4%	6.2%	4.40%	2.00%	-0.50%

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