

Domestic Market Performance

Indian market indices	5-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24650	-0.30	-3.19	10.40	2.47
BSE Sensex	80710	-0.38	-3.26	9.58	2.48
BSE 100	25833	-0.32	-3.20	10.90	1.59
BSE 200	11195	-0.28	-3.18	10.84	0.69
BSE 500	35793	-0.27	-3.18	11.70	0.50
BSE SmallCap	52831	-0.27	-3.65	22.39	0.96
BSE MidCap	45596	-0.14	-2.60	15.96	-0.78
BSE LargeCap	9495	-0.32	-3.17	9.37	0.72
Sectoral indices					
BSE IT	34471	-0.52	-10.04	-3.29	-12.07
BSE Oil & Gas	26150	-0.96	-7.78	-5.41	-15.80
BSE FMCG	20524	-0.61	1.73	6.24	-7.63
BSE Auto	53362	0.38	-0.48	8.59	-4.47
BSE Bankex	61620	-0.28	-3.21	15.15	8.22
BSE Teck	17080	-0.27	-9.34	6.02	-5.69
BSE Capital Goods	68701	0.29	-5.01	12.73	-2.47
BSE Consumer Durable	60017	0.11	-1.81	14.81	2.86

Turnover (Rs Cr)	5-Aug	4-Aug
BSE Cash	10463	6400
NSE Cash	88655	83320
NSE F&O	10951811	11592547

Rs. Cr (Equity)	FII Inv 4-Aug	MF Inv 31-July	DII Inv 5-Aug
Buy	9,879	24,431	12,915
Sell	11,847	22,811	10,126
Net	-1,968	1,619	2,789
Net (MTD)	-3,413	47,019	9,764
Net (YTD)	-99,856	282,652	410,959

	5-Aug	1Day	Month ago	Year ago
USD	87.79	87.50	85.39	83.85
GBP	116.62	116.24	116.78	106.85
Euro	101.42	101.27	100.60	91.83
100 Yen	59.68	59.29	59.18	58.92

Indian markets

- Indian equity benchmarks ended lower on Tuesday as fresh tariff warnings from the US president over India's ongoing oil trade with Russia and sustained foreign fund outflows weakened investor sentiment.
- The top losers were Adani Ports, Adani Enterprises, Reliance, Infosys and ICICI Bank, down 1.28-2.22%.
- The top gainers were, IndusInd Bank, Titan Company, Maruti Suzuki, SBI Life Insurance and Trent, up 1.31-1.88%.

Indian debt

- The interbank call money rate ended lower at 4.90% on Tuesday compared to 4.95% on Monday.
- Government bond prices ended marginally lower on Tuesday ahead of the RBI policy decision, with focus on rate guidance and economic forecasts.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.33% on Tuesday compared to 6.32% on Monday.

Indian Rupee

- The rupee weakened against the US dollar on Tuesday after the US president threatened to impose steeper tariffs on Indian goods due to its oil trade with Russia.

Regulatory

- The RBI tweaked norms and allowed banks to open Special Rupee Vostro Accounts (SRVAs) of correspondent banks without its prior approval.
- SEBI issued new guidelines for market infrastructure institutions (MIIs) -- stock exchanges, clearing corporations and depositories -- for handling requests to review or waive penalties related to regulatory actions
- The Competition Commission of India (CCI) approved the acquisition of Jaiprakash Associates Limited (JAL) by Dalmia Cement (Bharat) Limited.

Economy and Government

- India HSBC Services PMI edged higher to 60.5 in July 2025, compared to 60.4 in June 2025 and the HSBC Composite PMI came in at 61.0 in July 2025, unchanged from June 2025.
- Prime Minister Narendra Modi announced India will now offer free e-visas to tourists from the Philippines.

## Domestic Debt Market Indicators

Instrument	5-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.90%	4.95%	4.75%	5.75%	6.24%	5.75%
3-Month T-Bill	5.38%	5.38%	5.32%	5.87%	6.93%	6.62%
6-Month T-Bill	5.46%	5.48%	5.48%	5.90%	7.04%	6.72%
1-year T-Bill	5.47%	5.47%	5.53%	5.89%	7.07%	6.75%
3-Month CD	5.73%	5.73%	5.78%	6.52%	7.55%	7.18%
6-Month CD	5.99%	6.00%	6.00%	6.62%	7.37%	7.44%
1-year CD	6.22%	6.22%	6.20%	6.75%	7.62%	7.60%
3-Month CP	6.18%	6.18%	6.20%	6.74%	8.15%	7.64%
6-Month CP	6.36%	6.36%	6.40%	7.03%	7.71%	7.81%
1-year CP	6.65%	6.65%	6.60%	7.07%	8.10%	7.91%
1-year Gilt	5.56%	5.57%	5.57%	5.96%	7.14%	6.70%
3-year Gilt	5.81%	5.84%	5.83%	6.02%	7.16%	6.77%
5-year Gilt	6.08%	6.07%	6.06%	6.07%	7.05%	6.78%
1-year AAA	6.48%	6.48%	6.45%	6.97%	7.70%	7.63%
3-year AAA	6.66%	6.66%	6.63%	6.98%	7.70%	7.57%
5-year AAA	6.70%	6.70%	6.67%	6.99%	7.70%	7.51%
10-year G-sec	6.33%	6.32%	6.30%	6.32%	7.05%	6.86%
Net LAF (Rs Cr)	399965	409620	404417	121216	-73145	286196
Forex reserves (\$ bn)	698.19	695.49	702.78	688.13	642.49	667.39

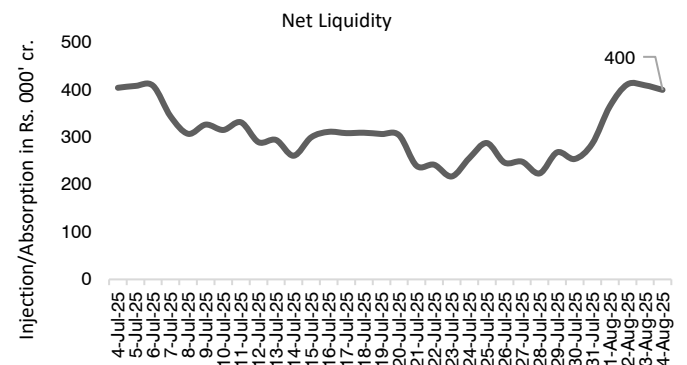
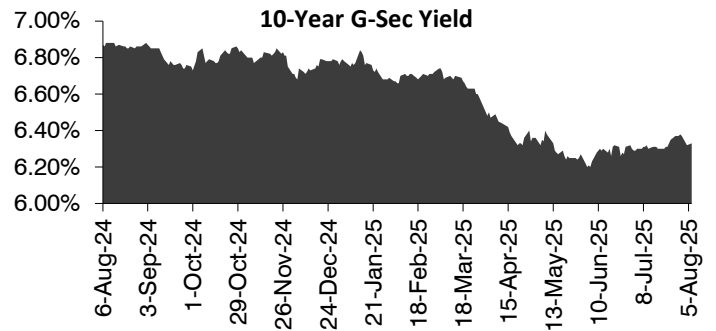
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.46	6.29	7.00	7.04	8.27	8.80
1 Year	5.56	6.48	7.19	7.23	8.46	8.99
3 Year	5.81	6.66	7.37	7.41	8.64	9.17
5 Year	6.08	6.70	7.51	7.54	8.78	9.31
10 Year	6.33	6.93	7.74	7.77	9.01	9.54

Rs. Cr (Debt)	FII Inv 4-Aug	MF Inv 31-July
Buy	841	6,596
Sell	439	9,902
Net	401	-3,306
Net (MTD)	475	-21,227
Net (YTD)	3,456	-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

- GameRamp raised \$5.4 million funding in round led by Bitkraft Ventures.
- Tryo raised Rs 3 crore in pre-seed funding round led by Zeropearl VC.
- TurboHire raised \$6 million in Series A funding, led by homegrown venture capital firm IvyCap Ventures.
- Assetz raised Rs 125 crore from Motilal Alternates to acquire and develop a 11.5-acre land parcel on the Old Madras Road (OMR)/Hoskote Highway in East Bengaluru.
- Nimbus Projects Ltd raised Rs 150 crore from Bajaj Finance to revive a stuck housing project in Sector 168, Noida.



Global market indices	5-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44111.74	-0.14	-0.86	10.81	13.97
Nikkei 225	40549.54	0.64	1.86	0.95	28.90
FTSE	9142.73	0.16	3.62	14.97	14.17
Hang Seng	24902.53	0.68	4.12	50.55	49.13
Taiwan	23660.59	1.20	4.94	17.44	19.31

Global debt	5-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.22	4.22	4.26	4.36	4.21	3.78
UK 10-Year (%)	4.52	4.51	4.55	4.50	3.98	3.87
German 10-Year (%)	2.62	2.63	2.57	2.52	2.29	2.18
Japan 10-Year (%)	1.47	1.51	1.44	1.27	0.71	0.90

Domestic	5-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100076	-0.09	3.15	48.81	44.79
Silver (Rs / Kg)	112422	0.47	4.50	51.66	42.40
Aluminium (Rs / Kg)	253	-0.20	1.16	21.44	19.91
Copper (Rs / kg)	886	-0.34	-0.98	16.79	13.21
Lead (Rs / kg)	185	-0.83	0.05	2.43	-2.68
Zinc (Rs /Kg)	271	1.40	4.09	24.25	7.99
Nickel (Rs / kg)	1326	-1.04	-0.55	-6.74	-3.61

Global	5-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3373.05	0.27	1.19	0.27	38.07
Silver (oz/\$)	3729.00	0.70	1.08	0.70	30.43
Brent (\$/bbl)	67.64	-1.63	-0.97	-1.63	-11.35
NYMEX crude (\$/bbl)	65.16	-1.70	-2.75	-1.70	-10.67

## Upcoming market indicators

Date	Indicator	Previous
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%
Aug 13	Japan PPI, July	2.9%

## Global markets

- Wall Street stocks ended lower on Tuesday weighed down by tariff concerns and trade data showed a sharp drop in consumer good imports.
- 10-year US bond yield ended flat at 4.22% due to uncertainty around US tariffs.
- FTSE index closed marginally higher on Tuesday supported by strong corporate earnings ahead of the Bank of England's rate decision.
- Asian markets were trading higher at 8.30 AM.
- The US trade deficit narrowed to \$60.2 billion in June 2025, compared to a revised \$71.7 billion gap in May 2025.
- US S&P Global US Services PMI rose to 55.7 in July 2025 compared to 52.9 in June 2025 while the S&P Global Composite PMI rose to 55.1 from 52.9.
- US ISM Services PMI unexpectedly fell to 50.1 in July 2025 compared to 50.8 in June 2025.
- Eurozone HCOB Services PMI edged up to 51.0 in July 2025 compared to 50.5 in June 2025 while the HCOB Composite PMI rose to 50.9 from 50.6.
- Eurozone producer price inflation accelerated to 0.6% in June 2025, compared to 0.3% in May 2025.
- UK S&P Global Services PMI edged down to 51.8 in July 2025 compared to 52.8 in June 2025 while the S&P Global Composite PMI eased to 51.5 from 52.

## Commodity

- Crude oil prices fell by \$1.13 to \$65.16 a barrel on the NYMEX as rising OPEC+ supply and global demand growth concerns.
- The Organization of the Petroleum Exporting Countries and its allies, together known as OPEC+, agreed to raise oil production by 547,000 barrels per day for September.
- Domestic gold prices ended flat as gains due to safe haven appeal were capped owing to profit booking at higher level.

## Forthcoming results

6-Aug	Bajaj Auto
6-Aug	Trent
6-Aug	Bajaj Holdings & Investment
6-Aug	Pidilite Industries
7-Aug	Life Insurance Corporation of India
7-Aug	Titan Company

**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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