# Daily Market Monitor

August 07, 2025

TATA mutual fund

## Domestic Market Performance

| Indian market indices | 6-Aug | 1D % Chg | 1M % Chg | FYTD % Chg | 1Yr % Chg |
|---|---|---|---|---|---|
| Nifty 50 | 24574 | -0.31 | -3.48 | 10.07 | 2.42 |
| BSE Sensex | 80544 | -0.21 | -3.46 | 9.36 | 2.48 |
| BSE 100 | 25734 | -0.38 | -3.57 | 10.47 | 1.62 |
| BSE 200 | 11140 | -0.49 | -3.65 | 10.30 | 0.64 |
| BSE 500 | 35588 | -0.57 | -3.73 | 11.06 | 0.35 |
| BSE SmallCap | 52228 | -1.14 | -4.75 | 20.99 | 0.37 |
| BSE MidCap | 45142 | -1.00 | -3.57 | 14.80 | -1.07 |
| BSE LargeCap | 9458 | -0.39 | -3.55 | 8.94 | 0.69 |
| **Sectoral indices** | | | | | |
| BSE IT | 33907 | -1.64 | -11.51 | -4.88 | -13.72 |
| BSE Oil & Gas | 26102 | -0.18 | -7.95 | -5.58 | -15.36 |
| BSE FMCG | 20360 | -0.80 | 0.91 | 5.39 | -8.46 |
| BSE Auto | 53082 | -0.52 | -1.00 | 8.02 | -4.43 |
| BSE Bankex | 61684 | 0.10 | -3.11 | 15.27 | 9.16 |
| BSE Teck | 16875 | -1.20 | -10.43 | 4.74 | -6.73 |
| BSE Capital Goods | 68131 | -0.83 | -5.79 | 11.80 | -2.89 |
| BSE Consumer Durable | 59930 | -0.14 | -1.96 | 14.64 | 3.67 |

| Turnover (Rs Cr) | 6-Aug | 5-Aug |
|---|---|---|
| BSE Cash | 10373 | 10463 |
| NSE Cash | 89123 | 88655 |
| NSE F&O | 20009728 | 10951811 |

| Rs. Cr (Equity) | FII Inv 5-Aug | MF Inv 4-Aug | DII Inv 6-Aug |
|---|---|---|---|
| Buy | 16,759 | 10,405 | 15,289 |
| Sell | 15,197 | 7,140 | 9,335 |
| Net | 1,561 | 3,265 | 5,955 |
| Net (MTD) | -1,852 | 4,747 | 15,718 |
| Net (YTD) | -98,295 | 287,399 | 416,913 |

| | 6-Aug | 1Day | Month ago | Year ago |
|---|---|---|---|---|
| USD | 87.70 | 87.79 | 85.39 | 83.97 |
| GBP | 116.69 | 116.62 | 116.78 | 106.72 |
| Euro | 101.60 | 101.42 | 100.60 | 91.63 |
| 100 Yen | 59.47 | 59.68 | 59.18 | 57.99 |

## Indian markets

- Indian equity benchmarks ended lower on Wednesday due to persistent worries over US trade tariffs and after the RBI kept its policy repo rate and stance unchanged, dampening hopes for a more dovish signal amid global trade headwinds.
- The top losers were, Wipro, Sun Pharma, IndusInd Bank, Jio Financial Services and Tech Mahindra, down 1.78-2.42%.
- The top gainers were, Asian Paints, HDFC Life, Bharat Electronics, Trent and Adani Ports, up 0.66-2.23%.

## Indian debt

- The interbank call money rate ended flat at 4.90% on Wednesday.
- Government bond prices ended lower on Wednesday after the RBI held rates steady and trimmed FY26 inflation forecast to 3.1%, defying rate cut hopes.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.41% on Wednesday compared to 6.33% on Tuesday.

## Indian Rupee

- The rupee ended higher against the US dollar on Wednesday as the Reserve Bank of India's (RBI) Monetary Policy Committee kept the repo rate unchanged.

## Regulatory

- RBI Governor Sanjay Malhotra announced, that the process for legal heirs to access bank accounts and lockers of deceased individuals will soon be simplified.
- The Reserve Bank of India has introduced three customer-centric measures, including simplified KYC procedures via panchayat-level camps, streamlined claims for deceased account holders, and enhanced features on the Retail Direct platform for government securities.
- Reserve Bank of India (RBI) Governor Sanjay Malhotra clarified that the Unified Payments Interface (UPI), though free for users, comes with a cost and someone in the system must absorb it.
- Reserve Bank of India (RBI) Governor Sanjay Malhotra said the Indian economy is contributing more to global growth than the United States.
- The Reserve Bank of India (RBI) issued revised guidelines to strengthen the co-lending framework between banks and non-bank financial companies (NBFCs).

## Economy and Government

- The Monetary Policy Committee (MPC) of the Reserve Bank of India (RBI) voted unanimously to hold the policy repo rate at 5.50%
- Accordingly, the standing deposit facility, marginal standing facility and bank rates remained unchanged at 5.25%, 5.27% and 6.75%, respectively. The MPC wants to assess the full impact of past actions on inflation and growth by maintaining a neutral policy stance, signalling policy continuity and stability
- According to provisional estimates released by the National Statistical Office, India's real gross domestic product (GDP) is expected to grow 6.5% this fiscal (6.5% in Q1, 6.7% in Q2, 6.6% in Q3 and 6.3% in Q4), supported by strong domestic demand, policy support and a good monsoon.
- The apex bank cut Consumer Price Index (CPI) inflation forecast for this fiscal to 3.1% from 3.7% earlier.

## Domestic Debt Market Indicators

| Instrument | 6-Aug | 1D ago | 1M ago | 3 M ago | FYTD ago | Year ago |
|---|---|---|---|---|---|---|
| Call rate | 4.90% | 4.90% | 4.75% | 5.85% | 6.24% | 5.75% |
| 3-Month T-Bill | 5.42% | 5.38% | 5.32% | 5.89% | 6.93% | 6.61% |
| 6-Month T-Bill | 5.50% | 5.46% | 5.48% | 5.90% | 7.04% | 6.72% |
| 1-year T-Bill | 5.55% | 5.47% | 5.53% | 5.88% | 7.07% | 6.71% |
| 3-Month CD | 5.80% | 5.73% | 5.78% | 6.50% | 7.55% | 7.16% |
| 6-Month CD | 6.03% | 5.99% | 6.00% | 6.64% | 7.37% | 7.45% |
| 1-year CD | 6.26% | 6.22% | 6.20% | 6.73% | 7.62% | 7.60% |
| 3-Month CP | 6.18% | 6.18% | 6.20% | 6.74% | 8.15% | 7.60% |
| 6-Month CP | 6.36% | 6.36% | 6.40% | 6.96% | 7.71% | 7.81% |
| 1-year CP | 6.70% | 6.65% | 6.60% | 7.07% | 8.10% | 7.91% |
| 1-year Gilt | 5.64% | 5.56% | 5.57% | 5.95% | 7.14% | 6.72% |
| 3-year Gilt | 5.90% | 5.81% | 5.83% | 6.02% | 7.16% | 6.79% |
| 5-year Gilt | 6.15% | 6.08% | 6.06% | 6.08% | 7.05% | 6.79% |
| 1-year AAA | 6.55% | 6.48% | 6.45% | 6.97% | 7.70% | 7.63% |
| 3-year AAA | 6.73% | 6.66% | 6.63% | 6.98% | 7.70% | 7.57% |
| 5-year AAA | 6.77% | 6.70% | 6.67% | 6.99% | 7.70% | 7.51% |
| 10-year G-sec | 6.41% | 6.33% | 6.30% | 6.35% | 7.05% | 6.87% |
| Net LAF (Rs Cr) | 397133 | 399965 | 404417 | 137383 | -73145 | 278760 |
| Forex reserves ($ bn) | 698.19 | 695.49 | 702.78 | 688.13 | 642.49 | 667.39 |

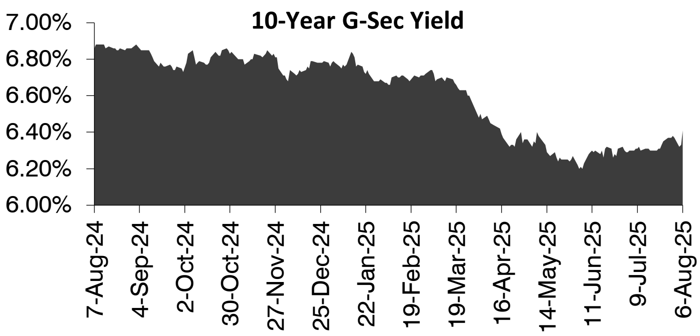
| Yields (%) | G-sec | AAA | AA+ | AA | AA- | A+ |
|---|---|---|---|---|---|---|
| 6 months | 5.50 | 6.33 | 7.04 | 7.08 | 8.31 | 8.84 |
| 1 Year | 5.63 | 6.55 | 7.26 | 7.30 | 8.53 | 9.06 |
| 3 Year | 5.90 | 6.73 | 7.44 | 7.48 | 8.71 | 9.24 |
| 5 Year | 6.15 | 6.77 | 7.58 | 7.61 | 8.85 | 9.38 |
| 10 Year | 6.41 | 7.00 | 7.81 | 7.84 | 9.08 | 9.61 |

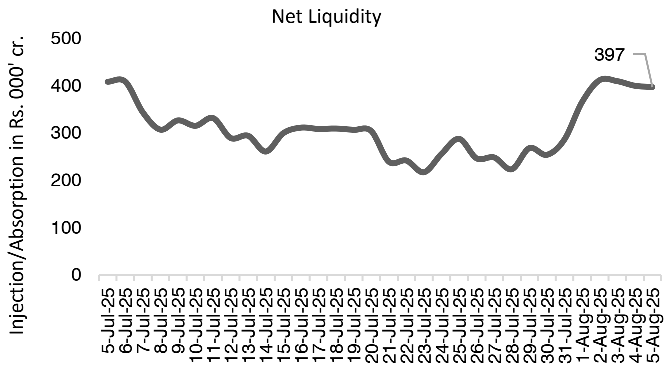
| Rs. Cr (Debt) | FII Inv 5-Aug | MF Inv 4-Aug |
|---|---|---|
| Buy | 386 | 14,781 |
| Sell | 152 | 25,113 |
| Net | 234 | -10,332 |
| Net (MTD) | 709 | -33,043 |
| Net (YTD) | 3,690 | -359,978 |

| 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 Manufactung 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

- NHPC and NTPC Green Energy plan to raise a combined Rs 4,500 crore through short-term bond sales this month.
- Prestige Hospitality Ventures Limited secured regulatory approval from the Securities and Exchange Board of India (SEBI) for its proposed Rs 2,700 crore initial public offering (IPO).
- Core Energy Systems announced a Rs 200 crore fund raise from a clutch of investors.
- All Time Plastics garnered Rs 120 crore from anchor investors ahead of its initial share-sale opening for public subscription.
- Rillet raised $70 million in a fundraise co-led by venture capital firms Andreessen Horowitz and Iconiq in a bid to disrupt an industry dominated by tools from Oracle and Microsoft.
- SuperGaming raised $15 million in funding round led by Skycatcher, Steadview Capital at $100 million valuation.
- DPDzero raised $7 million in a Series A funding round led by GMO Venture Partners, a Japanese fintech-focused venture capital firm, SMBC Asia Rising Fund, and Blume Ventures.
- CodeKarma raised $2.5 million from Prosus and Accel.



| Global market indices | 6-Aug | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|---|---|---|---|---|---|
| DJIA | 44193.12 | 0.18 | -0.68 | 11.02 | 13.32 |
| Nikkei 225 | 40794.86 | 0.60 | 2.47 | 1.56 | 17.65 |
| FTSE | 9164.31 | 0.24 | 3.87 | 15.24 | 14.17 |
| Hang Seng | 24910.63 | 0.03 | 4.16 | 50.60 | 49.64 |
| Taiwan | 23447.36 | -0.90 | 3.99 | 16.38 | 14.37 |

| Global debt | 6-Aug | 1D ago | 1M ago | 3M ago | FYTD | 1Y ago |
|---|---|---|---|---|---|---|
| US 10-Year (%) | 4.22 | 4.22 | 4.26 | 4.30 | 4.21 | 3.90 |
| UK 10-Year (%) | 4.52 | 4.52 | 4.55 | 4.51 | 3.98 | 3.92 |
| German 10-Year (%) | 2.64 | 2.62 | 2.57 | 2.53 | 2.29 | 2.18 |
| Japan 10-Year (%) | 1.50 | 1.47 | 1.44 | 1.29 | 0.71 | 0.89 |

| Domestic | 6-Aug | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|---|---|---|---|---|---|
| Gold (Rs / 10 gm) | 100452 | 0.38 | 3.54 | 49.37 | 45.20 |
| Silver (Rs / Kg) | 113485 | 0.95 | 5.49 | 53.10 | 43.37 |
| Aluminium (Rs / Kg) | 252 | -0.18 | 0.98 | 21.23 | 19.42 |
| Copper (Rs / kg) | 885 | -0.19 | -1.17 | 16.56 | 13.82 |
| Lead (Rs / kg) | 185 | -0.05 | 0.00 | 2.38 | -1.88 |
| Zinc (Rs /Kg) | 270 | -0.39 | 3.69 | 23.77 | 8.06 |
| Nickel (Rs / kg) | 1341 | 1.15 | 0.60 | -5.67 | -1.56 |

| Global | 6-Aug | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|---|---|---|---|---|---|
| Gold (oz/$) | 3380.24 | 0.21 | 1.40 | 0.21 | 40.58 |
| Silver (oz/$) | 3783.00 | 1.45 | 2.55 | 1.45 | 38.83 |
| Brent ($/bbl) | 66.89 | -1.11 | -2.06 | -1.11 | -12.54 |
| NYMEX crude ($/bbl) | 64.35 | -1.24 | -3.96 | -1.24 | -12.09 |

## Upcoming market indicators

| Date | Indicator | Previous |
|---|---|---|
| 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% |
| Aug 14 | US PPI, Jul | 148.236 |

## Global markets

- Wall Street stocks closed higher on Wednesday boosted by upbeat corporate earnings and gains in Apple stocks on domestic manufacturing plans.
- 10-year US bond yield ended flat at 4.22% as investors remained on the edge due to tariff uncertainty.
- FTSE index closed higher on Wednesday as investors assessed corporate earnings and awaited a potential Bank of England rate cut.
- Asian markets were trading higher at 8.30 AM.
- Eurozone HCOB Construction PMI edged down to 44.7 in July 2025 compared to 45.2 in June 2025.
- Eurozone Retail Sales increased 3.1% in June 2025 compared to a 1.9% gain in May 2025.
- UK S&P Global Construction PMI fell to 44.3 in July 2025 compared to 48.8 in June 2025.

## Commodity

- Crude oil prices fell by 81 cents to $64.35 a barrel on the NYMEX as US President's comments on Russia talks raised doubts over new sanctions.
- Domestic gold prices ended higher due to safe haven appeal following US tariff announcements.

## Forthcoming results

| | |
|---|---|
| 7-Aug | Life Insurance Corporation of India |
| 7-Aug | Titan Company |
| 8-Aug | State Bank of India |
| 8-Aug | Tata Motors |
| 8-Aug | Info Edge India |

***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% |