

Daily Market Monitor

August 11, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	8-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24363	-0.95	-4.54	9.12	1.02
BSE Sensex	79858	-0.95	-4.60	8.43	1.23
BSE 100	25505	-1.06	-4.66	9.49	-0.17
BSE 200	11031	-1.13	-4.75	9.23	-1.37
BSE 500	35229	-1.14	-4.78	9.94	-1.79
BSE SmallCap	51597	-1.03	-5.43	19.53	-3.00
BSE MidCap	44571	-1.56	-4.66	13.35	-4.41
BSE LargeCap	9371	-1.04	-4.65	7.94	-0.98
Sectoral indices					
BSE IT	33816	-0.99	-11.42	-5.13	-13.78
BSE Oil & Gas	26029	-0.11	-8.84	-5.84	-17.44
BSE FMCG	20200	-0.74	-1.10	4.56	-10.08
BSE Auto	52473	-1.40	-1.63	6.78	-6.94
BSE Bankex	61127	-1.04	-4.54	14.22	7.18
BSE Teck	16685	-1.53	-11.17	3.56	-7.82
BSE Capital Goods	66751	-1.62	-7.49	9.53	-6.70
BSE Consumer Durable	59029	-1.68	-1.65	12.92	1.99

Turnover (Rs Cr)	8-Aug	7-Aug
BSE Cash	15522	11915
NSE Cash	100445	98041
NSE F&O	12187218	61369371

Rs. Cr (Equity)	FII Inv 7-Aug	MF Inv 6-Aug	DII Inv 8-Aug
Buy	10,489	12,964	15,970
Sell	16,008	7,254	8,533
Net	-5,520	5,710	7,437
Net (MTD)	-11,770	12,558	33,916
Net (YTD)	-108,213	295,210	435,111

	8-Aug	1Day	Month ago	Year ago
USD	87.62	87.69	85.72	83.96
GBP	117.66	117.27	116.82	106.40
Euro	102.05	102.38	100.61	91.75
100 Yen	59.48	59.59	58.65	57.47

Indian markets

- Indian equity benchmarks ended lower on Friday, weighed down by financial stocks amid weak global cues, stalled US-India trade talks and persistent foreign fund outflows.
- The top losers were Bajaj Finance, IndusInd Bank, Shriram Finance, Bajaj Auto and Tech Mahindra, down 2.45-4.71%.
- The top gainers were Cipla, SBI Life Insurance, Apollo Hospital, Dr Reddys Labs and HDFC Life, up 0.67-3.00%.

Indian debt

- The interbank call money rate ended lower at 5.00% on Friday compared to 5.80% on Thursday.
- Government bond prices ended lower on Friday as the sentiment was cautious after the RBI held rates and signalled higher inflation.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.41% on Friday compared to 6.39% on Thursday.

Indian Rupee

- The rupee closed lower against the United States (US) dollar on Friday, tracking the weak trend in domestic equities and foreign portfolio investment (FPI) outflows.

Regulatory

- The RBI plans to standardise forms to process claims on deceased customers' bank accounts and lockers within a 15-day timeframe and provide compensation to nominees for any settlement delays.
- Securities and Exchange Board of India (Sebi) proposed a single-window gateway for trusted foreign investors called SWAGAT-FI.
- Sebi chief urged redefining role of independent directors as stewards of accountability.
- Sebi has proposed a separate category of Alternative Investment Fund (AIF) schemes, consisting of accredited investors, which will enjoy a lighter-touch regulatory framework compared to regular AIFs.
- Sebi has modified the framework governing the transformation of private listed Infrastructure Investment Trusts (InvITs) to public InvITs, with updated sponsor holding requirements and harmonised disclosure norms.
- Sebi mandated all regulated entities under its ambit to ensure that their digital platforms are accessible to the differently-abled, in accordance with the Rights of Persons with Disabilities Act, 2016.

Economy and Government

- According to data published by the Reserve Bank of India (RBI), India's foreign exchange reserves registered a decrease of \$9.32 billion, reaching a total of \$688.87 billion for the week ending August 1.
- Moody's Ratings said India's GDP growth is likely to slow down by about 30 basis points to 6% in the current fiscal if the US implements 50% tariffs from August 27.
- Government reopened the portal for inviting fresh applications under the performance-linked incentive scheme for textiles sector.
- The Union Cabinet approved significant proposals, including the MERITE scheme with a Rs 4,200 crore outlay to enhance technical education across 275 institutions.
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Domestic Debt Market Indicators

Instrument	8-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.80%	4.90%	5.85%	6.24%	6.75%
3-Month T-Bill	5.43%	5.41%	5.31%	5.87%	6.93%	6.61%
6-Month T-Bill	5.50%	5.51%	5.43%	5.87%	7.04%	6.71%
1-year T-Bill	5.54%	5.51%	5.52%	5.86%	7.07%	6.71%
3-Month CD	5.78%	5.77%	5.72%	6.56%	7.55%	7.16%
6-Month CD	6.03%	6.03%	6.00%	6.67%	7.37%	7.43%
1-year CD	6.30%	6.26%	6.16%	6.78%	7.62%	7.60%
3-Month CP	6.18%	6.18%	6.20%	6.80%	8.15%	7.63%
6-Month CP	6.36%	6.36%	6.40%	7.00%	7.71%	7.83%
1-year CP	6.70%	6.70%	6.65%	7.10%	8.10%	7.91%
1-year Gilt	5.62%	5.64%	5.57%	5.92%	7.14%	6.73%
3-year Gilt	5.90%	5.92%	5.82%	6.08%	7.16%	6.78%
5-year Gilt	6.15%	6.14%	6.06%	6.12%	7.05%	6.79%
1-year AAA	6.51%	6.53%	6.45%	7.07%	7.70%	7.64%
3-year AAA	6.69%	6.71%	6.63%	7.08%	7.70%	7.58%
5-year AAA	6.73%	6.75%	6.67%	7.09%	7.70%	7.51%
10-year G-sec	6.40%	6.39%	6.31%	6.40%	7.05%	6.88%
Net LAF (Rs Cr)	354932	390651	307212	132548	-73145	165608
Forex reserves (\$ bn)	688.87	698.19	702.78	688.13	642.49	667.39

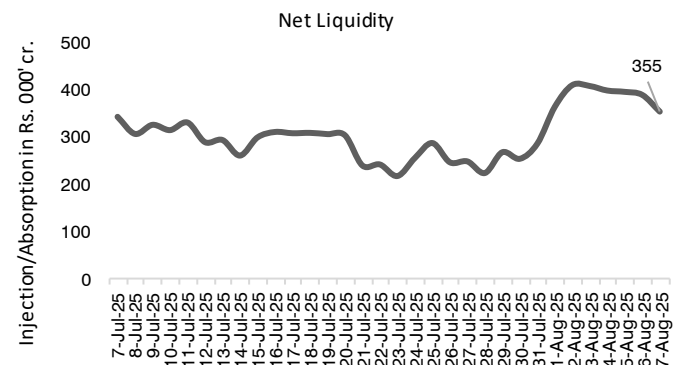
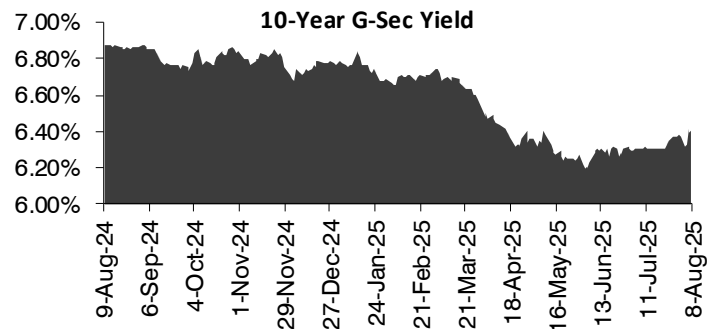
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	6.30	7.01	7.05	8.28	8.81
1 Year	5.62	6.51	7.22	7.26	8.49	9.02
3 Year	5.90	6.69	7.40	7.44	8.67	9.20
5 Year	6.15	6.73	7.54	7.57	8.81	9.34
10 Year	6.40	6.98	7.79	7.82	9.06	9.59

Rs. Cr (Debt)	FII Inv 7-Aug	MF Inv 6-Aug
Buy	1,389	13,167
Sell	784	20,326
Net	606	-7,158
Net (MTD)	1,648	-45,557
Net (YTD)	4,629	-372,492

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*	0.10% (July 25, 2025)		-0.44% (July 11, 2025)
Bank Deposit Growth*	0.21% (July 25, 2025)		-0.11% (July 11, 2025)

Capital markets

- Silver Consumer Electricals Ltd (SCEL) filed preliminary papers with markets regulator Sebi, seeking its approval to raise Rs 1,400 crore through an Initial Public Offering (IPO).
- Technology solutions provider Transline Technologies filed its Draft Red Herring Prospectus (DRHP) with the capital markets regulator, the Securities and Exchange Board of India (Sebi), for its initial public offering (IPO).
- T&T Group plans to transform Raj Nagar Extension's housing market with a Rs 700 crore high-end residential project.
- DLF plans to invest Rs 23,500 cr in ongoing housing projects in NCR, Mumbai.
- DRA Group signed a pact with Philippines-based Balajadia Family office to jointly develop a commercial project with an estimated investment of \$100 million.
- Coromandel International announced the successful closure of the share purchase agreement (SPA) for the acquisition of 53% promoter shareholding in NACL Industries (NACLIND) for Rs 820 crore.



Global market indices	8-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44175.61	0.47	-0.15	10.97	11.99
Nikkei 225	41820.48	1.85	5.37	4.11	20.07
FTSE	9095.73	-0.06	2.73	14.37	11.67
Hang Seng	24858.82	-0.89	2.94	50.28	47.16
Taiwan	24021.26	0.07	7.42	19.23	15.10

Global debt	8-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.27	4.23	4.42	4.37	4.21	3.99
UK 10-Year (%)	4.60	4.56	4.63	4.55	3.98	3.98
German 10-Year (%)	2.69	2.64	2.64	2.52	2.29	2.27
Japan 10-Year (%)	1.49	1.47	1.49	1.37	0.71	0.87

Domestic	8-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100942	0.24	4.09	50.10	45.86
Silver (Rs / Kg)	114732	-0.45	6.73	54.78	45.45
Aluminium (Rs / Kg)	255	-0.20	2.62	22.60	20.62
Copper (Rs / kg)	887	-0.22	-1.28	16.86	14.97
Lead (Rs / kg)	184	-0.33	0.49	1.69	-4.97
Zinc (Rs /Kg)	271	-0.42	5.34	24.39	8.15
Nickel (Rs / kg)	1343	-0.10	1.45	-5.58	-1.41

Global	8-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3387.43	0.46	1.63	0.46	42.04
Silver (oz/\$)	3818.00	0.87	3.95	0.87	43.26
Brent (\$/bbl)	66.59	0.24	-5.07	0.24	-15.88
NYMEX crude (\$/bbl)	63.88	0.00	-6.51	0.00	-16.16

Global markets

- Wall Street stocks ended higher on Friday driven by tech gains and optimism over potential rate cuts.
- 10-year US bond yield ended higher at 4.27% as investors weighed the effect of higher tariffs on the outlook for US economic growth and inflation.
- FTSE index closed lower on Friday as investors assessed the Bank of England's rate decision.
- Asian markets were trading higher at 8.30 AM.
- China's consumer price inflation came in flat at 0.0% in July following 0.1% growth in the previous month.
- China's producer prices fell 3.6% year-on-year in July 2025 unchanged from the June month.
- Japan household spending rose 1.3% in June 2025, compared to a 4.7% increase in May 2025.
- Japan Economy Watchers Survey edged up to 45.2 in July 2025 compared to 45.0 in June 2025 while the Economy Watchers Survey Outlook increased to 47.30 from 45.90.

Commodity

- Crude oil prices were unchanged at \$63.88 a barrel on the NYMEX on tariff driven economic concerns.
- Domestic gold prices ended higher due to safe haven appeal following uncertainty around US tariffs.

Forthcoming results

Date	Company
12-Aug	Hindalco Industries
12-Aug	Apollo Hospitals Enterprises
13-Aug	Samvardhana Motherson International

Upcoming market indicators

Date	Indicator	Previous
Aug 12	US Inflation Rate, Jul	2.7%
Aug 13	Japan PPI, July	2.9%
Aug 14	US PPI, Jul	148.236
Aug 15	US Industrial Production, Jul	0.7%
Aug 18	Eurozone Balance of Trade, Jun	€16.2B

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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