

Daily Market Monitor

August 12, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	11-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24585	0.91	-2.25	10.11	0.89
BSE Sensex	80604	0.93	-2.30	9.44	1.13
BSE 100	25756	0.98	-2.27	10.57	-0.28
BSE 200	11135	0.94	-2.48	10.25	-1.44
BSE 500	35539	0.88	-2.75	10.91	-1.85
BSE SmallCap	51776	0.35	-4.97	19.95	-3.43
BSE MidCap	44921	0.79	-2.96	14.24	-4.81
BSE LargeCap	9462	0.97	-2.37	8.99	-0.95
Sectoral indices					
BSE IT	33939	0.36	-8.34	-4.78	-14.83
BSE Oil & Gas	26185	0.60	-5.82	-5.28	-17.62
BSE FMCG	20353	0.75	-1.06	5.35	-9.70
BSE Auto	53015	1.03	0.86	7.88	-7.38
BSE Bankex	61818	1.13	-2.80	15.52	7.59
BSE Teck	16742	0.34	-7.46	3.92	-8.79
BSE Capital Goods	66967	0.32	-5.64	9.88	-7.67
BSE Consumer Durable	58760	-0.46	-1.23	12.40	0.64

Turnover (Rs Cr)	11-Aug	8-Aug
BSE Cash	11677	15522
NSE Cash	81194	100445
NSE F&O	12606483	12187218

Rs. Cr (Equity)	FII Inv 8-Aug	MF Inv 7-Aug	DII Inv 11-Aug
Buy	18,514	15,766	14,700
Sell	15,687	6,663	8,748
Net	2,826	9,103	5,951
Net (MTD)	-8,944	21,661	39,867
Net (YTD)	-105,387	304,314	441,062

	11-Aug	1Day	Month ago	Year ago
USD	87.58	87.62	85.85	83.95
GBP	117.96	117.66	116.29	107.11
Euro	102.17	102.05	100.29	91.69
100 Yen	59.35	59.48	58.45	57.03

Indian markets

- Indian equity benchmarks ended higher on Monday, supported by strong earnings from banks and automobile companies, as well as short covering at lower levels on optimism with regard to the upcoming US-Russia talks.
- The top gainers were, Adani Enterprises, Tata Motors, Eternal, Grasim and Apollo Hospital, up 2.46-4.83%.
- The top losers were Hero MotoCorp, Bharat Electronics and Bharti Airtel, down 0.06-0.82%.

Indian debt

- The interbank call money rate ended flat at 5.00% on Monday.
- Government bond prices ended lower on Monday ahead of release of inflation numbers from India and US.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.44% on Monday compared to 6.41% on Friday.

Indian Rupee

- The rupee ended higher vs the dollar on Monday, owing to a weaker US Dollar Index and recovery in the non-deliverable forward market.

Regulatory

- Reserve Bank of India Governor Sanjay Malhotra said banks are free to decide the minimum balance for savings accounts and that it does not fall under the regulatory domain of the RBI.
- The IBBI has proposed making it mandatory for the committee of creditors (CoC) to formally record its deliberations on the eligibility of resolution applicants under Section 29A of the IBC Code aimed to enhance transparency in the corporate insolvency resolution process (CIRP).

Economy and Government

- The Central government will release Rs 3,200 crore installment of Pradhan Mantri Fasal Bima Yojana.
- The Lok Sabha approved the Taxation Laws (Amendment) Bill, 2025, by extending tax exemptions to subscribers of the Unified Pension Scheme.
- Parliament approved the Merchant Shipping Bill, 2025, which focus to broaden the criteria for owning merchant shipping vessels.
- The Lok Sabha approved the National Sports Governance Bill. The bill aims to make sports federations work fairly and openly.
- Finance Minister Nirmala Sitharaman said there is no proposal under consideration for the restoration of the Old Pension Scheme (OPS) in respect of central government employees covered under the National Pension System (NPS).
- The Union government is proposing to increase contributions from mining proceeds to bolster exploration and development of critical mineral supply chains.
- The Delhi Jal Board (DJB) approved administrative sanctions for sewage treatment plant augmentation and upgradation projects worth Rs 917.33 crore across the city
- The Uttar Pradesh government allocated over Rs 6,000 crore for greenfield township projects across the state..

Domestic Debt Market Indicators

Instrument	11-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.00%	5.00%	5.85%	6.24%	5.75%
3-Month T-Bill	5.44%	5.43%	5.38%	5.89%	6.93%	6.63%
6-Month T-Bill	5.51%	5.50%	5.52%	5.90%	7.04%	6.72%
1-year T-Bill	5.51%	5.54%	5.56%	5.86%	7.07%	6.72%
3-Month CD	5.80%	5.78%	5.75%	6.64%	7.55%	7.15%
6-Month CD	6.04%	6.03%	6.00%	6.80%	7.37%	7.43%
1-year CD	6.30%	6.30%	6.21%	6.85%	7.62%	7.60%
3-Month CP	6.28%	6.18%	6.20%	6.90%	8.15%	7.63%
6-Month CP	6.39%	6.36%	6.35%	7.16%	7.71%	7.83%
1-year CP	6.72%	6.70%	6.65%	7.20%	8.10%	7.91%
1-year Gilt	5.62%	5.62%	5.58%	6.06%	7.14%	6.76%
3-year Gilt	5.95%	5.90%	5.82%	6.04%	7.16%	6.77%
5-year Gilt	6.21%	6.15%	6.08%	6.08%	7.05%	6.79%
1-year AAA	6.54%	6.51%	6.46%	7.10%	7.70%	7.64%
3-year AAA	6.72%	6.69%	6.64%	7.10%	7.70%	7.58%
5-year AAA	6.76%	6.73%	6.68%	7.10%	7.70%	7.51%
10-year G-sec	6.43%	6.40%	6.30%	6.38%	7.05%	6.88%
Net LAF (Rs Cr)	246780	354932	331620	170742	-73145	146452
Forex reserves (\$ bn)	688.87	698.19	699.74	686.06	642.49	674.92

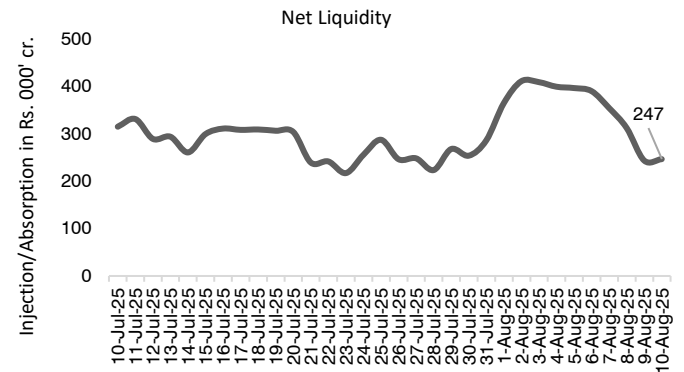
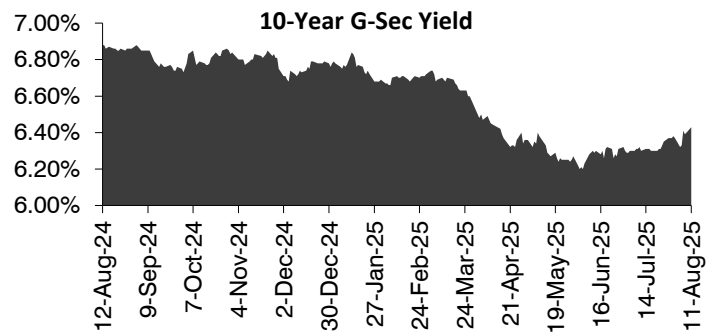
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.51	6.30	7.01	7.05	8.28	8.81
1 Year	5.62	6.54	7.25	7.29	8.52	9.05
3 Year	5.95	6.72	7.43	7.47	8.70	9.23
5 Year	6.21	6.76	7.57	7.60	8.84	9.37
10 Year	6.43	7.01	7.82	7.85	9.09	9.62

Rs. Cr (Debt)	FII Inv 8-Aug	MF Inv 7-Aug
Buy	164	13,576
Sell	83	17,871
Net	81	-4,296
Net (MTD)	1,729	-49,853
Net (YTD)	4,711	-376,788

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	59.2 (Jul-25)	58.1 (Mar-25)	58.1 (Jul-24)
India Service PMI	60.50 (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

- BSE raises bar for SME to mainboard migration with higher profit, shareholder requirements.
- Lodha Developers received board's approval for raising Rs 5,000 crore through the issuance of non-convertible debentures (NCDs).
- Speciale Invest has closed its third fund at Rs 600 crore to invest in expansion project.
- Shreeji Shipping Global Ltd announced a price band of Rs 240 to Rs 252 per share for its Rs 411-crore initial public offering (IPO).



Global market indices	11-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43975.09	-0.45	-0.89	10.47	11.34
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	9129.71	0.37	2.11	14.80	11.77
Hang Seng	24906.81	0.19	3.18	50.57	45.74
Taiwan	24135.5	0.48	6.09	19.80	12.42

Global debt	11-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.27	4.27	4.43	4.37	4.21	3.94
UK 10-Year (%)	4.56	4.60	4.63	4.56	3.98	3.94
German 10-Year (%)	2.70	2.69	2.69	2.55	2.29	2.22
Japan 10-Year (%)	4.56	1.49	1.50	1.37	0.71	0.85

Domestic	11-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99957	-0.98	2.51	48.63	43.49
Silver (Rs / Kg)	113501	-1.07	2.91	53.12	41.41
Aluminium (Rs / Kg)	255	-0.04	1.90	22.55	18.56
Copper (Rs / kg)	889	0.23	0.61	17.13	13.97
Lead (Rs / kg)	185	0.87	1.31	2.57	-3.71
Zinc (Rs /Kg)	273	0.42	4.31	24.91	5.19
Nickel (Rs / kg)	1344	0.10	1.61	-5.49	-2.64

Global	11-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3400.35	0.38	1.45	0.38	39.86
Silver (oz/\$)	3833.00	0.39	-0.16	0.39	39.58
Brent (\$/bbl)	66.63	0.06	-5.30	0.06	-16.36
NYMEX crude (\$/bbl)	63.96	0.13	-6.56	0.13	-16.76

Global markets

- Wall Street stocks ended lower on Monday as investors were caution ahead of the release of the US inflation data.
- 10-year US bond yield ended flat at 4.27% as investors remained on the side ways ahead of the release of the US inflation data.
- FTSE index ended higher on Monday due to stock specific buying.
- Asian markets were trading higher at 8.30 AM.
- China Total Vehicle Sales rose by 14.7% YoY in July 2025, compared to a 13.8% rise in June 2025.

Commodity

- Crude oil prices rose by 8 cents to \$63.96 a barrel on the NYMEX as investors remained caution ahead of Russia and US meeting outcome.
- Domestic gold prices ended lower due to profit booking and strong dollar index.

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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