

Daily Market Monitor

August 13, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	12-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24487	-0.40	-2.63	9.68	0.58
BSE Sensex	80236	-0.46	-2.75	8.94	0.74
BSE 100	25660	-0.37	-2.64	10.16	-0.53
BSE 200	11096	-0.35	-2.82	9.87	-1.72
BSE 500	35437	-0.29	-3.03	10.59	-2.11
BSE SmallCap	51797	0.04	-4.93	19.99	-3.88
BSE MidCap	44810	-0.25	-3.20	13.96	-5.08
BSE LargeCap	9429	-0.35	-2.71	8.61	-1.15
Sectoral indices					
BSE IT	34036	0.28	-8.08	-4.51	-14.89
BSE Oil & Gas	26342	0.60	-5.25	-4.71	-17.86
BSE FMCG	20264	-0.44	-1.50	4.89	-9.49
BSE Auto	53321	0.58	1.44	8.50	-6.65
BSE Bankex	61308	-0.83	-3.60	14.56	6.34
BSE Teck	16750	0.05	-7.42	3.96	-8.93
BSE Capital Goods	66461	-0.76	-6.35	9.05	-8.41
BSE Consumer Durable	58461	-0.51	-1.73	11.83	-0.78

Turnover (Rs Cr)	12-Aug	11-Aug
BSE Cash	8035	11677
NSE Cash	79109	81194
NSE F&O	16850728	12606483

Rs. Cr (Equity)	FII Inv 11-Aug	MF Inv 8-Aug	DII Inv 12-Aug
Buy	10,237	13,101	11,514
Sell	11,202	7,011	7,988
Net	-965	6,090	3,526
Net (MTD)	-9,909	27,751	43,393
Net (YTD)	-106,352	310,404	444,588

	12-Aug	1Day	Month ago	Year ago
USD	87.67	87.58	85.85	83.97
GBP	117.79	117.96	116.29	107.15
Euro	101.81	102.17	100.29	91.75
100 Yen	59.13	59.35	58.45	57.01

Indian markets

- Indian equity benchmarks ended lower on Tuesday, owing to a decline in banking sector stocks and as investors were cautious ahead of July's domestic and US inflation data.
- The top losers were Bajaj Finance, Trent, HUL, HDFC Bank and Nestle, down 1.26-2.83%.
- The top gainers were Maruti Suzuki, Tech Mahindra, Hero MotoCorp, Mahindra & Mahindra and NTPC, up 1.18-1.93%.

Indian debt

- The interbank call money rate ended higher at 5.05% on Tuesday compared to 5.00% on Monday.
- Government bond prices ended lower on Tuesday as weaker direct tax receipts and previously announced oil subsidies triggered fiscal concerns.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.49% on Tuesday compared to 6.44% on Monday.

Indian Rupee

- The rupee ended lower against the dollar on Tuesday owing to a strong dollar index and with investors waiting for the latest inflation data, which will impact the Reserve Bank of India's monetary policy decisions.

Regulatory

- As per RBI data, In June 2025, Indian companies, including non-banking financial companies (NBFCs), filed proposals with the Reserve Bank of India (RBI) to raise \$3.48 billion through External Commercial Borrowings (ECBs).
- Sebi plans to simplify the offer document preparation process by introducing a template-based approach for relevant sections as it aims to reduce repetitive information and streamline disclosures.

Economy and Government

- India's retail inflation eased to an over 8-year low of 1.55% in July from 2.1% in June.
- Finance and corporate affairs minister Nirmala Sitharaman on Tuesday introduced a bill in the Lok Sabha for amendments to the Insolvency and Bankruptcy Code (IBC).
- Finance Minister Nirmala Sitharaman said the proposed raising of FDI limit in Indian insurance companies to 100% would bring more players into the market and generate employment opportunities.
- The finance ministry notified a corrigendum to the Income Tax Bill with regard to interest to be charged on short payment of advance tax by a taxpayer.
- The Union government approved an investment of Rs 8146.21 crore for the construction of a 700 MW Tato-II hydro-electric project in Shi Yomi District of Arunachal Pradesh.
- India's net direct tax collections declined 3.95% on year to Rs 6.64 trillion in the period from April 1 to August 11
- The Indian Ports Bill, 2025 was passed by Lok Sabha.
- The Union Cabinet has approved an 11-kilometre extension to the first phase of the Lucknow Metro, featuring 12 new stations, at a cost of Rs 5,801 crore
- The Union Cabinet approved four additional semiconductor manufacturing projects under the India Semiconductor Mission (ISM).

Domestic Debt Market Indicators

Instrument	12-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.05%	5.00%	5.00%	5.85%	6.24%	5.75%
3-Month T-Bill	5.45%	5.44%	5.38%	5.89%	6.93%	6.61%
6-Month T-Bill	5.51%	5.51%	5.52%	5.90%	7.04%	6.70%
1-year T-Bill	5.54%	5.51%	5.56%	5.86%	7.07%	6.72%
3-Month CD	5.82%	5.80%	5.75%	6.64%	7.55%	7.15%
6-Month CD	6.10%	6.04%	6.00%	6.80%	7.37%	7.46%
1-year CD	6.32%	6.30%	6.21%	6.85%	7.62%	7.61%
3-Month CP	6.25%	6.28%	6.20%	6.90%	8.15%	7.63%
6-Month CP	6.39%	6.39%	6.35%	7.16%	7.71%	7.83%
1-year CP	6.80%	6.72%	6.65%	7.20%	8.10%	7.91%
1-year Gilt	5.59%	5.62%	5.58%	6.06%	7.14%	6.75%
3-year Gilt	5.96%	5.95%	5.82%	6.04%	7.16%	6.76%
5-year Gilt	6.27%	6.21%	6.08%	6.08%	7.05%	6.79%
1-year AAA	6.59%	6.54%	6.46%	7.10%	7.70%	7.64%
3-year AAA	6.77%	6.72%	6.64%	7.10%	7.70%	7.58%
5-year AAA	6.81%	6.76%	6.68%	7.10%	7.70%	7.51%
10-year G-sec	6.48%	6.43%	6.30%	6.38%	7.05%	6.88%
Net LAF (Rs Cr)	277142	246780	331620	166884	-73145	112620
Forex reserves (\$ bn)	688.87	698.19	699.74	686.06	642.49	674.92

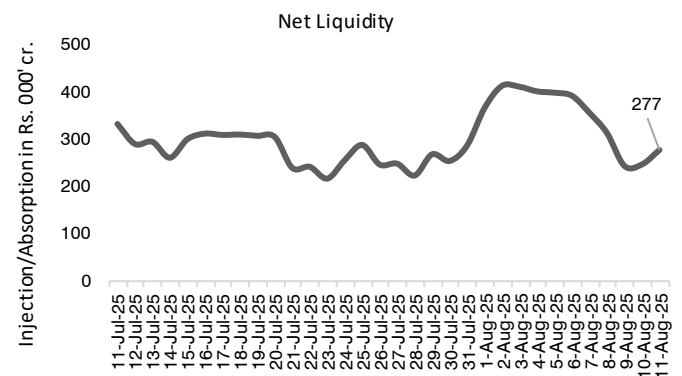
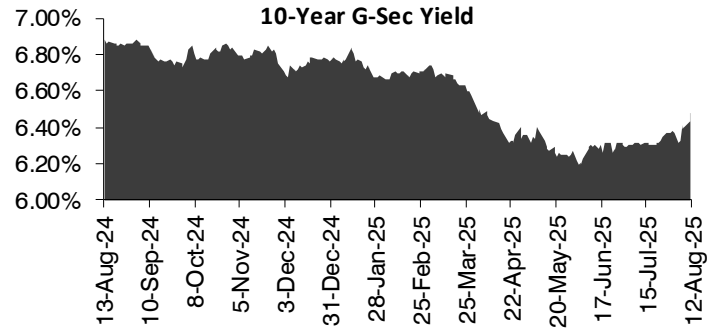
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.51	6.35	7.06	7.10	8.33	8.86
1 Year	5.59	6.59	7.30	7.34	8.57	9.10
3 Year	5.96	6.77	7.48	7.52	8.75	9.28
5 Year	6.27	6.81	7.62	7.65	8.89	9.42
10 Year	6.48	7.06	7.87	7.90	9.14	9.67

Rs. Cr (Debt)	FII Inv 11-Aug	MF Inv 8-Aug
Buy	264	11,103
Sell	397	18,628
Net	-133	-7,525
Net (MTD)	1,597	-57,378
Net (YTD)	4,578	-384,313

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.55% (Jul'25)	3.16% (Apr'25)	3.60% (Jul'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

- Fractal Analytics filed for an initial public offering for \$560 million IPO.
- Medi Assist Healthcare Services block deal worth Rs 578 crore.
- Dashverse raises \$13 million from Peak XV Partners, Z47.
- Fairdeal Market has raised \$3 million in a pre-series.



Global market indices	12-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44458.61	1.10	0.20	11.68	12.96
Nikkei 225	42718.17	2.15	7.96	6.35	21.96
FTSE	9147.81	0.20	2.31	15.03	11.42
Hang Seng	24969.68	0.25	3.44	50.95	45.92
Taiwan	24158.36	0.09	6.19	19.91	10.95

Global debt	12-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.27	4.43	4.45	4.21	3.90
UK 10-Year (%)	4.62	4.56	4.63	4.64	3.98	3.92
German 10-Year (%)	2.74	2.70	2.69	2.64	2.29	2.23
Japan 10-Year (%)	1.51	4.56	1.50	1.47	0.71	0.85

Domestic	12-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99670	-0.29	2.21	48.20	42.61
Silver (Rs / Kg)	113311	-0.17	2.74	52.86	39.68
Aluminium (Rs / Kg)	255	-0.16	1.74	22.36	18.07
Copper (Rs / kg)	889	0.04	0.66	17.18	13.30
Lead (Rs / kg)	188	1.46	2.79	4.07	-2.49
Zinc (Rs /Kg)	273	0.00	4.31	24.91	3.36
Nickel (Rs / kg)	1349	0.40	2.02	-5.11	-1.51

Global	12-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3344.11	-1.65	-0.23	-1.65	35.56
Silver (oz/\$)	3769.00	-1.67	-1.82	-1.67	37.25
Brent (\$/bbl)	66.12	-0.77	-6.03	-0.77	-19.66
NYMEX crude (\$/bbl)	63.17	-1.24	-7.71	-1.24	-21.10

Global markets

- Wall Street stocks closed higher on Tuesday as inflation reading for the July month boosted Fed rate cut hopes.
- 10-year US bond yield ended higher at 4.29% following the latest inflation figures.
- FTSE index rose on Tuesday buoyed by upbeat earnings reports of major companies and easing global trade tension after US extends its pause on higher tariffs for Chinese goods until November 10.
- Asian markets were trading higher at 8.30 AM.
- US annual inflation rate remained at 2.7% in in July 2025, the same as in June.
- The US budget deficit in July climbed 20% this fiscal year compared to the last despite the US taking in record income from President Donald Trump's tariffs.
- Eurozone ZEW Indicator of Economic Sentiment fell by 11 points from the prior month to 25.1 in August 2025.
- UK unemployment rate stood at 4.7% in the three months to June 2025, unchanged from the previous period as the market expected.
- Japan PPI rose 2.6% on year in July 2025, slowing from a 2.9% growth in the prior month

Commodity

- Crude oil prices fell by 79 cents to \$63.17 a barrel on the NYMEX ahead of an upcoming meeting between US and Russian presidents.
- Domestic gold prices ended lower due to strong dollar index.

Forthcoming results

Date	Company
13-Aug	Samvardhana Motherson International

Upcoming market indicators

Date	Indicator	Previous
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
Aug 19	US Building Permits Prel, Jul	1.393M

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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