Daily Market Monitor

August 14, 2025

TATA mutual fund

Domestic Market Performance

Indian market indices	13-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24619	0.54	-2.11	10.27	1.99
BSE Sensex	80540	0.38	-2.38	9.35	2.01
BSE 100	25796	0.53	-2.12	10.74	0.91
BSE 200	11155	0.53	-2.31	10.45	-0.30
BSE 500	35632	0.55	-2.50	11.20	-0.64
BSE SmallCap	52096	0.58	-4.38	20.69	-2.19
BSE MidCap	45060	0.56	-2.66	14.59	-3.61
BSE LargeCap	9478	0.53	-2.20	9.18	0.31
Sectoral indices					
BSE IT	34048	0.04	-8.05	-4.48	-14.64
BSE Oil & Gas	26335	-0.03	-5.28	-4.74	-16.81
BSE FMCG	20258	-0.03	-1.52	4.86	-9.22
BSE Auto	53948	1.18	2.64	9.78	-4.89
BSE Bankex	61484	0.29	-3.33	14.89	8.22
BSE Teck	16793	0.26	-7.18	4.23	-8.51
BSE Capital Goods	67133	1.01	-5.40	10.16	-6.70
BSE Consumer Durable	58579	0.20	-1.53	12.06	-2.00

Turnover (Rs Cr)	13-Aug	12-Aug
BSE Cash	8394	8035
NSE Cash	87454	79109
NSE F&O	22879594	16850728

Rs. Cr (Equity)	FII Inv 12-Aug	MF Inv 11-Aug	DII Inv 13-Aug
Buy	9,976	11,909	13,465
Sell	12,625	6,437	7,783
Net	-2,649	5,472	5,682
Net (MTD)	-12,557	33,223	49,075
Net (YTD)	-109,000	315,875	450,270

	13-Aug	1Day	Month ago	Year ago
USD	87.70	87.67	85.85	83.97
GBP	118.48	117.79	116.29	107.41
Euro	102.48	101.81	100.29	91.69
100 Yen	59.33	59.13	58.45	56.81

Indian markets

- Indian equity benchmarks closed higher on Wednesday, led by gains in auto and realty stocks as better-than-expected inflation data raised hopes of a rate cut by the Reserve Bank of India's Monetary Policy Committee. Markets also gained after the US inflation data raised expectations of a rate cut by the Federal Reserve (Fed).
- The top gainers were Apollo Hospital, Hindalco, Dr Reddy's Laboratories, Hero MotoCorp and Cipla, which were up 2.59-7.90%.
- The top losers were IndusInd Bank, Adani Ports, Titan Company, ITC and UltraTech Cement, which were down 0.39-1.23%.

Indian debt

- The interbank call money rate ended lower at 5.00% on Wednesday compared to 5.05% on Tuesday.
- Government bond prices ended higher on Wednesday due to short covering at lower level.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.48% on Wednesday compared to 6.49% on Tuesday.

Indian Rupee

- The rupee closed lower against the US dollar on Wednesday due to uncertainties over trade tariffs and foreign fund outflows.

Regulatory

- The Reserve Bank of India's panel submitted its report on framework for Responsible and Ethical Enablement of Artificial Intelligence (FREE-AI) in the financial sector.
- SEBI proposed to include new market practises such as algorithmic trading and proprietary trading in its master regulations.
- The IBBI has proposed imposing a cap on the number of assignments that insolvency professionals (IPs) can handle across key roles, in a bid to improve efficiency and ensure equitable distribution of work.
- The Insolvency and Bankruptcy Board of India (IBBI) urged Committees of Creditors (CoCs) to thoroughly discuss the information memorandum (IM) — a key document containing complete details of a company undergoing insolvency.

Economy and Government

- Chief Economic Advisor V Anantha Nageswaran said that the momentum of the Indian economy has not slowed down after the United States imposed 50% tariff on India. He also said that it was too early to assess the impact of US tariffs on the Gross Domestic Product (GDP).
- The commerce and industry ministry has firmed up support schemes worth about Rs 25,000 crore under the Export Promotion Mission for a six-year period, amid continuing uncertainties from higher tariffs imposed by the US.

Domestic Debt Market Indicators

Instrument	13-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.05%	5.00%	5.45%	6.24%	5.75%
3-Month T-Bill	5.46%	5.45%	5.38%	5.85%	6.93%	6.60%
6-Month T-Bill	5.55%	5.51%	5.52%	5.87%	7.04%	6.69%
1-year T-Bill	5.55%	5.54%	5.56%	5.86%	7.07%	6.71%
3-Month CD	5.83%	5.82%	5.75%	6.53%	7.55%	7.15%
6-Month CD	6.11%	6.10%	6.00%	6.73%	7.37%	7.50%
1-year CD	6.29%	6.32%	6.21%	6.75%	7.62%	7.61%
3-Month CP	6.25%	6.25%	6.20%	6.80%	8.15%	7.63%
6-Month CP	6.39%	6.39%	6.35%	7.04%	7.71%	7.83%
1-year CP	6.80%	6.80%	6.65%	7.10%	8.10%	7.91%
1-year Gilt	5.58%	5.59%	5.58%	5.90%	7.14%	6.74%
3-year Gilt	5.98%	5.96%	5.82%	5.99%	7.16%	6.76%
5-year Gilt	6.29%	6.27%	6.08%	6.02%	7.05%	6.79%
1-year AAA	6.62%	6.59%	6.46%	6.95%	7.70%	7.64%
3-year AAA	6.80%	6.77%	6.64%	6.98%	7.70%	7.58%
5-year AAA	6.84%	6.81%	6.68%	6.98%	7.70%	7.51%
10-year G-sec	6.48%	6.48%	6.30%	6.33%	7.05%	6.88%
Net LAF (Rs Cr)	262981	277142	331620	154326	-73145	125502
Forex reserves ($ bn)	688.87	698.19	699.74	686.06	642.49	674.92

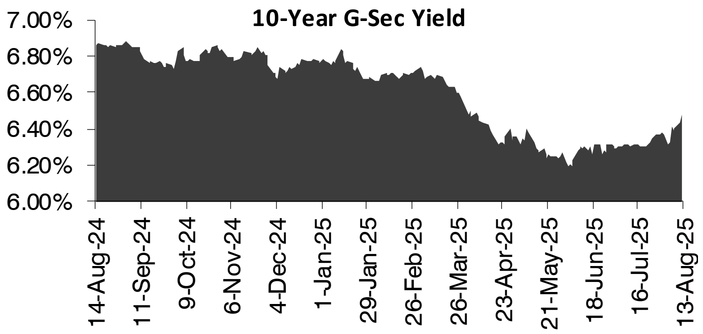
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.33	7.04	7.08	8.31	8.84
1 Year	5.58	6.62	7.33	7.37	8.60	9.13
3 Year	5.98	6.80	7.51	7.55	8.78	9.31
5 Year	6.29	6.84	7.65	7.68	8.92	9.45
10 Year	6.48	7.08	7.89	7.92	9.16	9.69

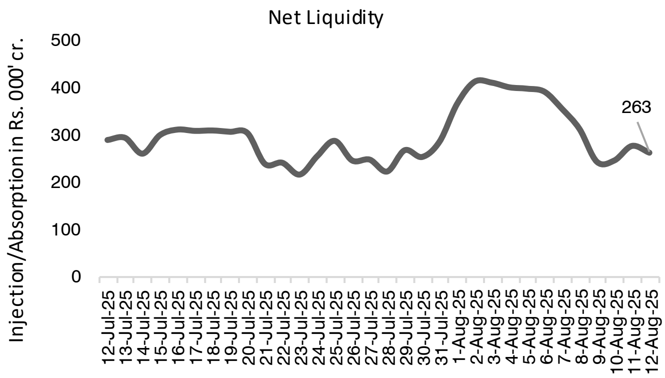
Rs. Cr (Debt)	FII Inv 12-Aug	MF Inv 11-Aug
Buy	219	11,103
Sell	890	18,628
Net	-671	-7,525
Net (MTD)	926	-57,378
Net (YTD)	3,907	-384,313

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 Manufactung PMI	59.2 (Jul-25)	58.1 (Mar-25)	58.1 (Jul-24)
India Service PMI	60.5 (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 Index Services, an arm of stock exchange BSE, announced the launch of defence index to track the performance of those stocks representing the theme.
- State Bank of India to issue Tier-II bonds to raise Rs 15,000 cr to replace maturing paper and fresh issuance.
- Fractal files filed its Draft Red Herring Prospectus (DRHP) with SEBI for Rs 4,900 crore IPO.
- Deeptech startup Comminent raises $2 million from Transition VC.
- Refold AI raised $6.5 million in seed funding.
- Arintra raised $21 million in Series A funding.





Global market indices	13-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44922.27	1.04	1.24	12.85	12.97
Nikkei 225	43274.67	1.30	9.36	7.73	19.44
FTSE	9165.23	0.19	2.51	15.25	11.29
Hang Seng	25613.67	2.58	6.11	54.85	49.14
Taiwan	24370.02	0.88	7.12	20.96	11.81

Global debt	13-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.24	4.29	4.43	4.49	4.21	3.85
UK 10-Year (%)	4.59	4.62	4.63	4.67	3.98	3.89
German 10-Year (%)	2.68	2.74	2.69	2.68	2.29	2.18
Japan 10-Year (%)	1.51	1.51	1.50	1.45	0.71	0.83

Domestic	13-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100097	0.43	2.65	48.84	42.09
Silver (Rs / Kg)	115275	1.73	4.52	55.51	42.84
Aluminium (Rs / Kg)	255	0.26	2.00	22.67	18.65
Copper (Rs / kg)	896	0.73	1.39	18.04	14.13
Lead (Rs / kg)	187	-0.45	2.32	3.60	-1.24
Zinc (Rs /Kg)	275	0.83	5.17	25.95	5.67
Nickel (Rs / kg)	1354	0.32	2.34	-4.81	-0.76

Global	13-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3349.70	0.17	-0.07	0.17	35.30
Silver (oz/$)	3796.00	0.72	-1.12	0.72	35.47
Brent ($/bbl)	65.63	-0.74	-6.72	-0.74	-18.66
NYMEX crude ($/bbl)	62.65	-0.82	-8.47	-0.82	-20.04

Upcoming market indicators

Date	Indicator	Previous
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
Aug 20	Eurozone Inflation Rate Final, Jul	2%

Global markets

- Wall Street stocks ended higher on Wednesday buoyed by rising hopes that the Federal Reserve may start its monetary policy easing cycle in September.
- 10-year US bond yield ended lower at 4.24% amid rising hopes for September Fed rate cut.
- FTSE index ended higher on Wednesday due to stock specific buying.
- Asian markets were trading higher at 8.30 AM.
- The UK Residential Market Survey from RICS showed the house price balance declined to -13% in July 2025, down from -7% in each of the previous two months.

Commodity

- Crude oil prices fell by 52 cents to $62.65 a barrel on the NYMEX International Energy Agency projected oversupply in the market this year due to surging supply from OPEC+ and non-OPEC+ oil producers.
- GJEPC data showed Gem and jewellery exports witnessed 15.98% year-on-year growth to $2,178.24 million (Rs 18,756.28 crore) in July amid global challenges.
- Domestic gold prices ended higher due to weakness in the dollar index.

Forthcoming results

14-Aug	Indian Oil Corporation

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.*

TATA mutual fund

	Indicators	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24
Debt Indicators	Currency in circulation (Rs billion)	38147	38372	38344	37762	36997	36444	35893	35643	35,589	35,103
	Repo rate	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%
	Call rate	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%
	Forex reserves ($ billion; mthly. avg.)	698	699	689	682	656	638	629	648	666	694
	GDP	NA	NA	7.40%			6.40%			5.40%	
	Fiscal deficit (Rs billion)	NA	2675.69	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7	2763.0
	IIP, %y/y	NA	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%	3.50%
	Exports, $ billion	NA	35.14	38.73	38.49	41.97	36.91	36.43	38.01	32.11	39.2
	Imports, $ billion	NA	53.92	60.61	64.91	63.51	50.96	59.42	59.95	69.95	66.34
	Manufacturing PMI	59.1	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5	57.5
	Services PMI	60.5	60.4	58.8	58.7	58.5	59	56.5	59.3	58.4	58.5
	GST collections (Rs crore)	195735	184597	201050	236716	196141	183646	195506	176857	182,269	187,346
	India crude oil import (mbpd)	NA	20.32	21.3	21.0	22.7	19.1	21.2	20.2	19.07	19.71
Sector update	Auto – Passenger vehicles	NA	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%	9.8%	20.7%	14.9%
	Auto – Two-wheelers	NA	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%
	Auto – Commercial vehicles	NA	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%
	Auto – Tractors	NA	10.50%	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%
	Infra – Coal	NA	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%
	Infra – Electricity	NA	-2.80%	-5.8%	1.0%	6.2%	3.6%	2.4%	6.2%	4.40%	2.00%
	Infra – Steel	NA	9.30%	6.7%	3.0%	7.1%	6.9%	4.7%	7.3%	10.5%	5.70%
	Infra – Cement	NA	9.20%	9.2%	6.7%	11.6%	10.8%	14.6%	4.6%	13.10%	3.10%