

Daily Market Monitor

August 18, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	14-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24631	0.05	-1.80	10.32	2.02
BSE Sensex	80598	0.07	-2.01	9.43	1.89
BSE 100	25794	-0.01	-2.02	10.73	0.90
BSE 200	11151	-0.04	-2.33	10.41	-0.26
BSE 500	35604	-0.08	-2.67	11.11	-0.57
BSE SmallCap	51789	-0.59	-5.49	19.98	-2.20
BSE MidCap	44979	-0.18	-3.48	14.39	-3.38
BSE LargeCap	9478	0.00	-2.09	9.18	0.29
Sectoral indices					
BSE IT	34177	0.38	-6.78	-4.12	-15.51
BSE Oil & Gas	26024	-1.18	-6.57	-5.86	-17.14
BSE FMCG	20142	-0.57	-2.29	4.26	-9.44
BSE Auto	53938	-0.02	2.31	9.76	-4.95
BSE Bankex	61625	0.23	-3.10	15.15	8.64
BSE Teck	16858	0.39	-6.08	4.64	-9.36
BSE Capital Goods	66761	-0.55	-5.86	9.55	-6.68
BSE Consumer Durable	59061	0.82	-1.07	12.98	-1.32

Turnover (Rs Cr)	14-Aug	13-Aug
BSE Cash	7812	8394
NSE Cash	83350	87454
NSE F&O	46524404	22879594

Rs. Cr (Equity)	FII Inv 13-Aug	MF Inv 11-Aug	DII Inv 14-Aug
Buy	12,995	11,909	12,595
Sell	15,259	6,437	8,894
Net	-2,264	5,472	3,700
Net (MTD)	-14,822	33,223	52,775
Net (YTD)	-111,264	315,875	453,970

	14-Aug	1Day	Month ago	Year ago
USD	87.49	87.70	85.99	83.95
GBP	118.82	118.48	115.70	107.89
Euro	102.38	102.48	100.28	92.58
100 Yen	59.81	59.33	58.38	57.10

Indian markets

- Indian equity benchmarks closed marginally higher on Thursday, buoyed by gains in IT and pharma stocks on the back of a softer US inflation data and dovish outlook. Meanwhile, investors remained caution ahead of the US-Russia summit.
- The top gainers were Wipro, Eternal, HDFC Life, Infosys and Asian Paints, up 1.14-2.14%.
- The top losers were Tata Steel, Adani Ports, Tech Mahindra, Hero MotoCorp and Bharat Electronics, down 1.02-3.05%.

Indian debt

- The interbank call money rate ended higher at 5.10% on Thursday compared to 5.00% on Wednesday.
- Government bond prices ended flat on Thursday earlier losses were erased after S&P Global Ratings upgraded the country's long-term sovereign credit rating to "BBB" from "BBB-".
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.48% on Thursday.

Indian Rupee

- The rupee closed higher against the US dollar on Thursday after S&P Global upgraded India's long-term unsolicited sovereign credit ratings to 'BBB' from 'BBB-'.

Regulatory

- Sebi launches investor awareness campaign on AIR to curb fraudulent activities.
- Sebi plans to review the margin framework under margin trading funding (MTF) in a bid to streamline risk management at clearing corporations.

Economy and Government

- India's merchandise trade deficit widened sharply to \$27.35 billion in July, up from \$18.78 billion in June.
- India's wholesale price index (WPI) fell to -0.58% in July compared to -0.13% in June.
- India's foreign exchange reserves rose \$4.7 billion to \$693.62 billion in the week ended August 8, data by the Reserve Bank of India (RBI) showed.
- S&P raises India's rating to BBB from BBB- with stable outlook. This reflects India's strong economic growth and better monetary policy.
- Govt plans Rs 25,000 cr export support mission to counter US tariff impact.
- The Uttarakhand cabinet has approved a second amendment to the state's Freedom of Religion Act.
- Kolkata port signs Rs 343.58 cr deal for Haldia berth mechanization.

Domestic Debt Market Indicators

Instrument	14-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.10%	5.00%	4.90%	5.85%	6.24%	5.75%
3-Month T-Bill	5.46%	5.46%	5.34%	5.80%	6.93%	6.57%
6-Month T-Bill	5.53%	5.55%	5.52%	5.82%	7.04%	6.71%
1-year T-Bill	5.54%	5.55%	5.55%	5.80%	7.07%	6.71%
3-Month CD	5.81%	5.83%	5.75%	6.49%	7.55%	7.17%
6-Month CD	6.09%	6.11%	5.97%	6.62%	7.37%	7.50%
1-year CD	6.29%	6.29%	6.20%	6.70%	7.62%	7.61%
3-Month CP	6.28%	6.25%	6.20%	6.79%	8.15%	7.63%
6-Month CP	6.38%	6.39%	6.35%	7.05%	7.71%	7.84%
1-year CP	6.80%	6.80%	6.61%	7.01%	8.10%	7.91%
1-year Gilt	5.59%	5.58%	5.58%	5.86%	7.14%	6.76%
3-year Gilt	5.96%	5.98%	5.81%	5.94%	7.16%	6.75%
5-year Gilt	6.25%	6.29%	6.08%	5.99%	7.05%	6.78%
1-year AAA	6.57%	6.62%	6.46%	6.92%	7.70%	7.64%
3-year AAA	6.75%	6.80%	6.64%	6.98%	7.70%	7.58%
5-year AAA	6.79%	6.84%	6.68%	6.98%	7.70%	7.51%
10-year G-sec	6.40%	6.48%	6.31%	6.29%	7.05%	6.86%
Net LAF (Rs Cr)	290262	262981	260951	183754	-73145	137250
Forex reserves (\$ bn)	688.87	698.19	699.74	686.06	642.49	674.92

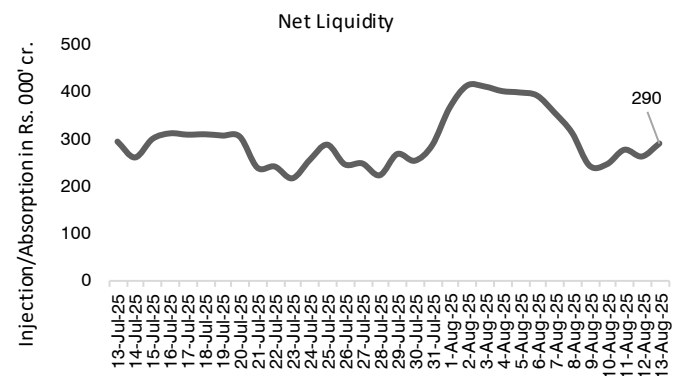
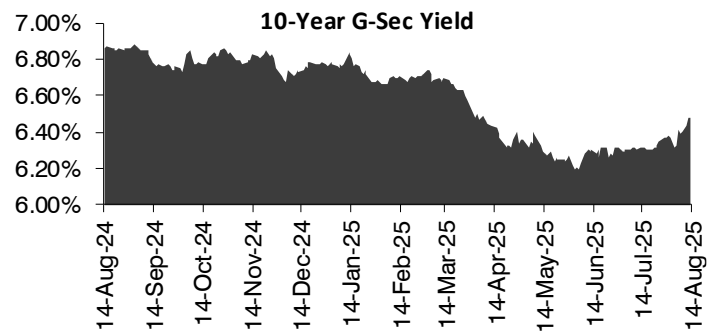
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.53	6.32	7.03	7.07	8.30	8.83
1 Year	5.59	6.57	7.28	7.32	8.55	9.08
3 Year	5.96	6.75	7.46	7.50	8.73	9.26
5 Year	6.25	6.79	7.60	7.63	8.87	9.40
10 Year	6.40	7.03	7.84	7.87	9.11	9.64

Rs. Cr (Debt)	FII Inv 13-Aug	MF Inv 11-Aug
Buy	2,549	11,103
Sell	790	18,628
Net	1,759	-7,525
Net (MTD)	2,684	-57,378
Net (YTD)	5,666	-384,313

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.55% (Jul'25)	3.16% (Apr'25)	3.60% (Jul'24)
WPI	-0.58% (Jul-25)	0.85% (Apr-25)	2.10% (Jul-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

- Livlong 365 to invest Rs 100 crore for expansion.
- The Department of Telecommunications has announced a fresh capital expenditure plan of nearly Rs 47,000 crore to expand and upgrade BSNL's network.
- Infosys signed a deal Rs 1,300 crore to buy Telstra's Versent stake.
- Gold loan firm Muthoot Finance plans to infuse Rs 200 crore in its housing finance subsidiary, Muthoot Homefin.
- KEC International secured new orders worth Rs 1,402 crore across its transmission and distribution (T&D), civil, and cables and conductors businesses.
- ACME Solar secured debt-funding of around Rs 15,000 crore for its greenfield projects.
- RSB Retail India filed its draft red herring prospectus (DRHP) with Sebi for an initial public offering (IPO).



Global market indices	15-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44946.12	0.08	2.10	12.91	10.81
Nikkei 225	43378.31	1.71	9.33	7.99	18.11
FTSE	9138.9	-0.42	2.24	14.92	9.48
Hang Seng	25270.07	-0.98	2.77	52.77	47.70
Taiwan	24334.48	0.40	6.56	20.79	11.14

Global debt	15-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.33	4.29	4.50	4.45	4.21	3.92
UK 10-Year (%)	4.70	4.64	4.62	4.66	3.98	3.92
German 10-Year (%)	2.78	2.71	2.72	2.63	2.29	2.26
Japan 10-Year (%)	1.56	1.55	1.58	1.47	0.71	0.84

Domestic	14-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100023	-0.07	1.75	48.73	41.29
Silver (Rs / Kg)	114933	-0.30	0.94	55.05	42.03
Aluminium (Rs / Kg)	255	-0.12	2.08	22.52	17.09
Copper (Rs / kg)	895	-0.12	1.45	17.89	13.54
Lead (Rs / kg)	185	-1.10	1.73	2.46	-1.78
Zinc (Rs /Kg)	273	-0.64	4.90	25.14	4.60
Nickel (Rs / kg)	1341	-0.89	1.03	-5.66	-1.97

Global	15-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3338.11	-0.59	-0.36	-0.59	36.27
Silver (oz/\$)	3803.00	-1.40	-1.02	-1.40	37.84
Brent (\$/bbl)	65.85	-1.48	-4.16	-1.48	-18.74
NYMEX crude (\$/bbl)*	62.80	-1.81	-5.59	-1.81	-19.65

Global markets

- Wall Street stocks closed mixed on Friday as Dow Jones rose marginally due to gains in UnitedHealth stocks while Nasdaq ended lower amid mixed economic data clouding Federal Reserve's policy expectations.
- 10-year US bond yield ended higher at 4.33% following US and Russia trade talks.
- FTSE index closed lower on Friday dragged down by financial stocks over alleged sanctions violations.
- Asian markets were trading higher at 8.30 AM.
- The Eurozone economy expanded 1.4% year-on-year in the second quarter of 2025, slightly lower than 1.5% in Q1.
- UK GDP grew 1.2% on year in Q2 2025 easing slightly from 1.3% in Q1 while it grew 0.3% on quarter from 0.7% in earlier quarter.
- UK industrial production increased 0.2% on year in June compared to 0.2% drop in the previous month.
- Japanese economy advanced 1.0% in Q2 2025, compared to 0.6% in the prior quarter.

Commodity

- Crude oil prices fell by \$1.16 to \$62.80 a barrel on the NYMEX after US and Russian President's agreed to pursue a Ukraine peace deal over a ceasefire.
- Domestic gold prices ended lower due to profit booking.

Forthcoming results

14-Aug	Indian Oil Corporation
--------	------------------------

Upcoming market indicators

Date	Indicator	Previous
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%
Aug 21	Japan Jibun Bank Manufacturing /Services /Composite PMI Flash, Aug (Aug 21)	53.6/51.5
Aug 22	UK Gfk Consumer Confidence, Aug	-19

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully