

Daily Market Monitor

August 20, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	19-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24981	0.42	0.05	11.89	1.66
BSE Sensex	81644	0.46	-0.14	10.85	1.52
BSE 100	26184	0.48	-0.15	12.41	0.56
BSE 200	11330	0.54	-0.47	12.19	-0.59
BSE 500	36211	0.58	-0.88	13.01	-0.91
BSE SmallCap	53021	0.97	-4.10	22.83	-2.84
BSE MidCap	45870	0.97	-1.94	16.65	-3.73
BSE LargeCap	9628	0.48	-0.17	10.90	0.03
Sectoral indices					
BSE IT	34140	0.32	-6.60	-4.22	-18.52
BSE Oil & Gas	26431	1.49	-5.25	-4.39	-18.54
BSE FMCG	20567	0.99	-1.29	6.46	-9.23
BSE Auto	57050	1.45	6.68	16.09	-0.49
BSE Bankex	62270	0.30	-0.75	16.36	8.44
BSE Teck	16925	0.47	-5.26	5.05	-11.46
BSE Capital Goods	67039	0.40	-4.50	10.00	-7.93
BSE Consumer Durable	61111	0.38	2.21	16.90	-0.56

Turnover (Rs Cr)	19-Aug	18-Aug
BSE Cash	7208	8903
NSE Cash	87635	106994
NSE F&O	12146831	12795273

Rs. Cr (Equity)	FII Inv 18-Aug	MF Inv 14-Aug	DII Inv 19-Aug
Buy	21,175	9,676	11,366
Sell	20,159	5,952	9,215
Net	1,016	3,724	2,151
Net (MTD)	-15,014	45,049	62,865
Net (YTD)	-111,457	327,701	464,060

	19-Aug	1Day	Month ago	Year ago
USD	87.18	87.41	86.20	83.86
GBP	117.68	118.41	115.73	108.73
Euro	101.62	102.27	100.16	92.56
100 Yen	59.04	59.29	57.93	57.30

Indian markets

- Indian equity benchmarks closed higher on Tuesday amid optimism over potential GST reforms and progress in the Russia-Ukraine peace talks.
- The top gainers were Tata Motors, Adani Ports, Reliance, Hero MotoCorp and Bajaj Auto, up 2.41-3.59%.
- The top losers were Dr Reddy's Labs, Bajaj Finserv, Cipla, Hindalco and M&M, down 0.86-1.47%.

Indian debt

- The interbank call money rate ended higher at 5.00% on Tuesday compared to 4.95% on Monday.
- Government bond prices ended lower on Tuesday due to fiscal concerns from the proposed GST reforms.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.51% on Tuesday compared to 6.49% on Monday.

Indian Rupee

- The rupee ended higher against the US dollar on Tuesday, buoyed by growth optimism following the government's decision to revise the GST and hopes of subsidizing the risk of US tariffs.

Regulatory

- SEBI is likely to introduce an intraday limit in index options trading for clients to ensure that no single participant takes excessive positions in the hugely popular index options segment during trading hours.

Economy and Government

- S&P Global Ratings said the Goods and Services Tax (GST) rationalisation reforms announced by Prime Minister on Independence Day could boost fiscal revenues over the longer term due to easier implementation and clearer accounting processes through the proposed two-rate system.
- The government of Maharashtra entered into a Memorandum of Understanding (MoU) with real estate developer Prestige Group for investments worth over Rs 12,500 crore in development of logistics, data centres, and Global Capability Centre (GCC) parks in and around Navi Mumbai.
- President Murmu said Indian Foreign Service trainees, emphasizing India's crucial role in addressing global challenges like North-South disparities, terrorism, and climate change.
- The government disbursed Rs 21,689 crore under PLI schemes for 12 sectors, including electronics and pharma, since the launch of the support measure to boost domestic manufacturing.
- The Union Cabinet approved two major infrastructure projects worth Rs 9,814 crore, including the construction of a new green field airport at Rajasthan's Kota-Bundi and a six-lane access-controlled ring road connecting Cuttack and Bhubaneswar in Odisha.
- The Maharashtra government signed memoranda of understanding (MoUs) worth Rs 42,893 crore with various companies for data centre and solar energy projects in the state.

Domestic Debt Market Indicators

Instrument	19-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	4.95%	5.10%	5.40%	6.24%	5.85%
3-Month T-Bill	5.48%	5.45%	5.35%	5.74%	6.93%	6.61%
6-Month T-Bill	5.54%	5.53%	5.49%	5.76%	7.04%	6.69%
1-year T-Bill	5.55%	5.55%	5.55%	5.81%	7.07%	6.71%
3-Month CD	5.76%	5.79%	5.75%	6.34%	7.55%	7.17%
6-Month CD	6.06%	6.07%	6.00%	6.59%	7.37%	7.45%
1-year CD	6.31%	6.32%	6.20%	6.60%	7.62%	7.62%
3-Month CP	6.25%	6.28%	6.21%	6.66%	8.15%	7.63%
6-Month CP	6.40%	6.40%	6.35%	6.86%	7.71%	7.84%
1-year CP	6.80%	6.80%	6.65%	7.02%	8.10%	7.91%
1-year Gilt	5.65%	5.62%	5.59%	5.77%	7.14%	6.75%
3-year Gilt	6.03%	6.00%	5.80%	5.86%	7.16%	6.76%
5-year Gilt	6.35%	6.34%	6.06%	5.95%	7.05%	6.78%
1-year AAA	6.64%	6.61%	6.43%	6.68%	7.70%	7.64%
3-year AAA	6.82%	6.79%	6.61%	6.75%	7.70%	7.58%
5-year AAA	6.86%	6.83%	6.65%	6.81%	7.70%	7.51%
10-year G-sec	6.51%	6.49%	6.30%	6.29%	7.05%	6.86%
Net LAF (Rs Cr)	306055	311505	309516	194047	-73145	117258
Forex reserves (\$ bn)	693.62	688.87	696.67	690.62	642.49	670.12

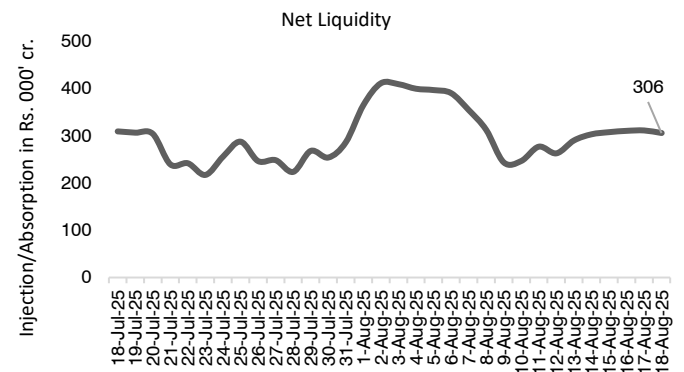
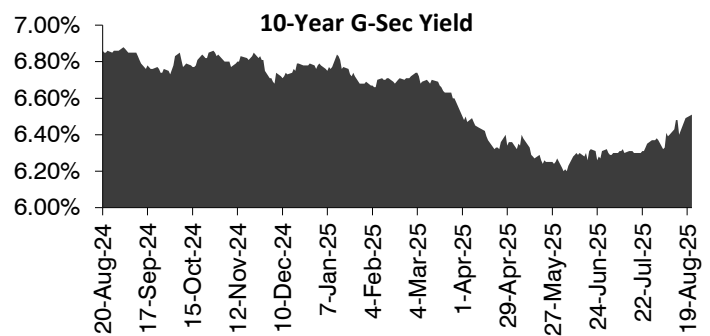
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	6.29	7.00	7.04	8.27	8.80
1 Year	5.65	6.64	7.35	7.39	8.62	9.15
3 Year	6.03	6.82	7.53	7.57	8.80	9.33
5 Year	6.35	6.86	7.67	7.70	8.94	9.47
10 Year	6.51	7.10	7.91	7.94	9.18	9.71

Rs. Cr (Debt)	FII Inv 18-Aug	MF Inv 14-Aug
Buy	1,032	11,172
Sell	1,144	11,944
Net	-111	-772
Net (MTD)	4,170	-63,332
Net (YTD)	7,151	-390,267

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

- OnEMI Technology Solutions filed its Draft Red Herring Prospectus (DRHP) with capital markets regulator, Securities and Exchange Board of India (SEBI) to raise funds through Initial Public Offering (IPO) worth Rs 1000 crore.
- Chennai's LGT Business Connexions plans to raise Rs 28.09 crore via Initial Public Offering (IPO).
- XED filed its Draft Red Herring Prospectus (DRHP) ahead of a proposed IPO to be listed on the NSE International Exchange at GIFT City.
- R for Rabbit raised \$27 million in Series B funding through a combination of primary and secondary transactions.
- Mangal Electrical Industries mobilised Rs 120 crore from anchor investors.



Global market indices	19-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44922.27	0.02	1.31	12.85	9.84
Nikkei 225	43546.29	-0.38	9.36	8.41	16.47
FTSE	9189.22	0.34	2.19	15.55	9.96
Hang Seng	25122.9	-0.21	1.20	51.88	42.99
Taiwan	24353.5	-0.53	4.15	20.88	8.67

Global debt	19-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.30	4.34	4.44	4.46	4.21	3.86
UK 10-Year (%)	4.72	4.73	4.67	4.66	3.98	3.93
German 10-Year (%)	2.75	2.78	2.69	2.58	2.29	2.25
Japan 10-Year (%)	1.59	1.57	1.52	1.47	0.71	0.89

Domestic	19-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99168	-0.46	0.94	47.46	39.46
Silver (Rs / Kg)	113625	-0.37	0.82	53.28	36.42
Aluminium (Rs / Kg)	251	-1.12	0.52	20.50	14.98
Copper (Rs / kg)	882	-0.25	-0.85	16.26	11.36
Lead (Rs / kg)	186	0.92	1.66	3.15	-3.84
Zinc (Rs /Kg)	269	-0.19	0.56	23.20	1.47
Nickel (Rs / kg)	1330	-0.22	0.86	-6.49	-2.69

Global	19-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3332.60	-0.07	-0.23	-0.07	32.88
Silver (oz/\$)	3801.00	0.00	-0.11	0.00	30.98
Brent (\$/bbl)	65.79	-1.22	-5.04	-1.22	-15.28
NYMEX crude (\$/bbl)	62.35	-1.69	-7.41	-1.69	-16.16

Upcoming market indicators

Date	Indicator	Previous
Aug 20	Eurozone Inflation Rate Final, Jul	2%
Aug 21	Japan S&P Global Manufacturing PMI Flash Aug (Aug 21)	48.9
Aug 22	UK Gfk Consumer Confidence, Aug	-19
Aug 25	US Chicago Fed National Activity Index, Jul	-0.10
Aug 26	US Richmond Fed Manufacturing Index, Aug	-20

Global markets

- Wall Street stocks closed mixed on Tuesday with Dow Jones ending flat as investors awaited Fed Chair's rate outlook at the Jackson Hole conference while Nasdaq declined dragged down by tech stocks.
- 10-year US bond yield ended lower at 4.30% as investors awaited the Federal Reserve July meeting minutes and its annual Jackson Hole symposium later in the week.
- FTSE index closed higher on Tuesday due to sector specific gains amid Russia-Ukraine peace deal hopes.
- Asian markets were trading lower at 8.30 AM.
- US Building permits fell by 2.8% to a seasonally adjusted annualized rate of 1.354 million in July 2025 compared to a 0.1% fall in June 2025.
- US Housing Starts decreased to 5.20% in July 2025 compared to 5.90% in June 2025.
- The People's Bank of China (PBOC) maintained key lending rates at record lows for the third consecutive month during the August fixing. The one-year Loan Prime Rate (LPR)—the benchmark for most corporate and household loans—was kept steady at 3.0%, while the five-year LPR, which guides mortgage rates, remained unchanged at 3.5%.
- Japan trade deficit decreased sharply to JPY 117.6 billion in July 2025 compared to JPY 628.3 billion in the same month a year earlier.
- Japan Machinery Orders decreased to 4.40% in May 2025 compared to 6.60% in April 2025.

Commodity

- Crude oil prices fell by \$1.07 to \$62.35 a barrel on the NYMEX as hopes for Russia-Ukraine deal raised expectations of eased sanctions and higher supply.
- Domestic gold prices ended lower due to strong dollar index and easing trade war concerns.

Forthcoming results

NA	NA
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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		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%

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