

Daily Market Monitor

August 25, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	22-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24870	-0.85	-0.76	11.39	0.24
BSE Sensex	81307	-0.85	-1.07	10.39	0.31
BSE 100	26085	-0.77	-0.82	11.98	-0.96
BSE 200	11287	-0.71	-1.09	11.76	-2.13
BSE 500	36090	-0.66	-1.39	12.63	-2.49
BSE SmallCap	53002	-0.35	-3.96	22.79	-4.67
BSE MidCap	45890	-0.23	-1.83	16.70	-5.66
BSE LargeCap	9585	-0.80	-0.90	10.40	-1.43
Sectoral indices					
BSE IT	34769	-0.77	-4.09	-2.46	-17.61
BSE Oil & Gas	26226	-0.80	-5.04	-5.13	-19.11
BSE FMCG	20522	-1.04	-0.77	6.23	-11.13
BSE Auto	56670	-0.18	6.10	15.32	-2.12
BSE Bankex	61475	-1.06	-3.09	14.87	5.85
BSE Teck	17234	-0.45	-2.90	6.97	-10.58
BSE Capital Goods	67151	0.08	-5.41	10.19	-8.25
BSE Consumer Durable	60673	-0.49	1.24	16.06	-3.94

Turnover (Rs Cr)	22-Aug	21-Aug
BSE Cash	6724	16671
NSE Cash	82241	97001
NSE F&O	12298176	49329135

Rs. Cr (Equity)	FII Inv 21-Aug	MF Inv 20-Aug	DII Inv 22-Aug
Buy	12,804	10,505	9,805
Sell	13,366	9,413	10,075
Net	-562	1,092	-270
Net (MTD)	-15,887	53,097	65,508
Net (YTD)	-112,330	335,750	466,703

	22-Aug	1Day	Month ago	Year ago
USD	87.44	86.97	86.26	83.95
GBP	117.13	116.96	116.20	110.19
Euro	101.34	101.20	100.82	93.52
100 Yen	58.84	58.97	58.36	57.67

Indian markets

- Indian equity benchmarks closed lower on Friday as investors were cautious ahead of the Fed chair's speech, which is expected to offer more clarity on his views on rate cuts. The US trade adviser's criticism of India ahead of the expected tariff increase on August 27 also dented the sentiment.
- The top losers were Asian Paints, Grasim, Adani Enterprises, UltraTech Cement and Hero MotoCorp, down 1.95-2.42%.
- The top gainers were Mahindra & Mahindra, Maruti Suzuki, Bharti Airtel, Bharat Electronics and Titan Company, up 0.13-0.83%.

Indian debt

- The interbank call money rate ended lower at 4.95% on Friday compared to 5.05% on Thursday.
- Government bond prices ended lower on Friday as proposed GST cuts fueled fiscal concerns and debt oversupply woes.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.55% on Friday compared to 6.53% on Thursday.

Indian Rupee

- The rupee ended lower against the dollar on Friday as the equity market fell and because the dollar gained strength ahead of an address by US Federal Reserve (Fed) Chairman Jerome Powell.

Regulatory

- Sebi has proposed a new framework for the Closing Auction Session (CAS) in the equity cash market, starting with highly liquid derivative stocks to determine the closing prices of shares.
- Sebi chairman Tuhin Kanta Pandey plans to propose additional financial incentives for distributors and fund houses to enroll first-time women investors.
- SEBI approved reclassification of LIC as a public shareholder in IDBI Bank following strategic divestment, subject to curbs on voting rights and board representation
- The Employees' State Insurance Corporation (ESIC) has said that Aadhaar authentication is not mandatory for workers to avail of benefits under the Employees' State Insurance (ESI) scheme.
- AMFI signed a pact with the Department of Posts to train one lakh postmen across India, enabling them to distribute mutual funds in remote areas.

Economy and Government

- RBI data showed India's forex reserves rose by \$ 1.488 billion to \$695.106 billion during the week ended August 15.
- Prime Minister Narendra Modi launched several projects, including the 660 MW Buxar thermal power plant, worth a total of Rs 6,880 crore in Bihar's Gayaji district.
- The Kerala government approved another instalment of dearness allowance (DA) for state employees and teachers, and dearness relief (DR) for pensioners.
- The government of Andhra Pradesh signed a deal with APM Terminals, to develop infrastructure and modernize the Ramayapatnam, Machilipatnam, and Mulapeta ports in the state, with an investment of Rs 9,000 crore.

Madhya Pradesh Chief Minister Mohan Yadav said the state received investment proposals of Rs 56,414 crore from eight companies during the Mining Conclave 2.0' held in the Katni district.

Domestic Debt Market Indicators

Instrument	22-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.05%	5.00%	5.45%	6.24%	5.75%
3-Month T-Bill	5.48%	5.47%	5.36%	5.65%	6.93%	6.62%
6-Month T-Bill	5.55%	5.56%	5.47%	5.67%	7.04%	6.71%
1-year T-Bill	5.58%	5.58%	5.54%	5.67%	7.07%	6.70%
3-Month CD	5.74%	5.74%	5.74%	6.20%	7.55%	7.19%
6-Month CD	6.04%	6.05%	6.00%	6.52%	7.37%	7.41%
1-year CD	6.33%	6.30%	6.20%	6.55%	7.62%	7.59%
3-Month CP	6.29%	6.25%	6.21%	6.52%	8.15%	7.69%
6-Month CP	6.47%	6.43%	6.35%	6.90%	7.71%	7.78%
1-year CP	6.72%	6.72%	6.65%	6.86%	8.10%	7.87%
1-year Gilt	5.62%	5.62%	5.57%	5.74%	7.14%	6.73%
3-year Gilt	6.00%	6.02%	5.81%	5.78%	7.16%	6.75%
5-year Gilt	6.34%	6.34%	6.07%	5.88%	7.05%	6.78%
1-year AAA	6.61%	6.61%	6.46%	6.61%	7.70%	7.64%
3-year AAA	6.79%	6.79%	6.64%	6.68%	7.70%	7.58%
5-year AAA	6.83%	6.83%	6.68%	6.76%	7.70%	7.48%
10-year G-sec	6.55%	6.52%	6.31%	6.26%	7.05%	6.85%
Net LAF (Rs Cr)	217469	265333	241925	99123	-73145	107477
Forex reserves (\$ bn)	695.11	693.62	696.67	690.62	642.49	670.12

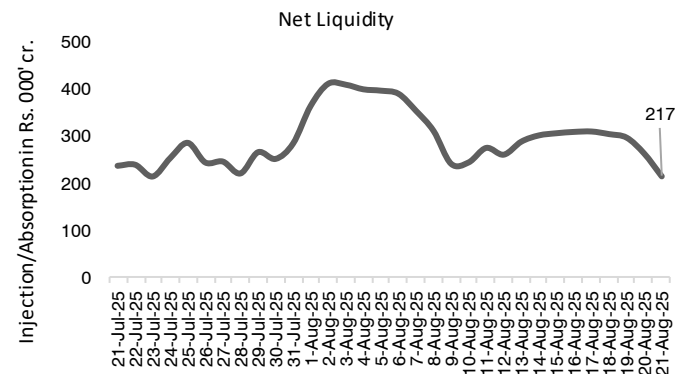
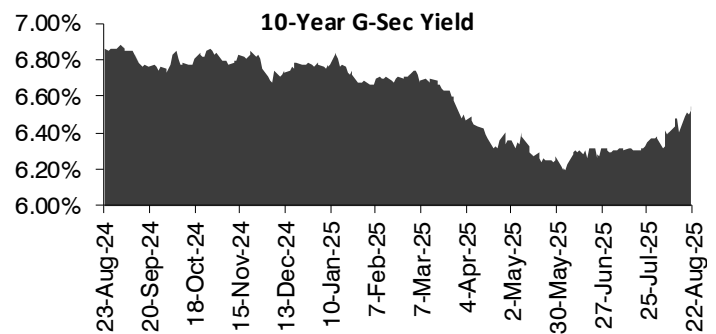
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.31	7.02	7.06	8.29	8.82
1 Year	5.62	6.61	7.32	7.36	8.59	9.12
3 Year	6.00	6.79	7.50	7.54	8.77	9.30
5 Year	6.34	6.83	7.64	7.67	8.91	9.44
10 Year	6.55	7.07	7.88	7.91	9.15	9.68

Rs. Cr (Debt)	FII Inv 21-Aug	MF Inv 20-Aug
Buy	788	10,505
Sell	929	9,413
Net	-140	1,092
Net (MTD)	4,422	-63,847
Net (YTD)	7,404	-390,782

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*	0.53% (Aug 8, 2025)		0.10% (July 25, 2025)
Bank Deposit Growth*	0.56% (Aug 8, 2025)		0.21% (July 25, 2025)

Capital markets

- WestBridge Capital plans to invest Rs 450 crore for a 15% stake in Edelweiss Mutual Fund, valuing it at about Rs 3,000 crore.
- Akme Fintrade (India) board approved issuing non-convertible debentures (NCDs) worth Rs 50 crore.
- Satin Creditcare Network raised Rs 100 crore through non-convertible debentures in two tranches to strengthen its asset-liability position, bolster CRAR, and expand lending in income-generating and WASH-focused loans for clients.
- South Indian Bank launched a new gold loan product, SIB Gold Xpress, designed to offer customers quick and convenient access to credit.
- Kiwi raised \$24 million in Series B funding round led by Vertex Ventures South East Asia & India.
- Sumitomo Mitsui Banking Corporation (SMBC) has received approval from the Reserve Bank of India to acquire up to 24.99% stake in Yes Bank.



Global market indices	22-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	45631.74	1.89	2.54	14.63	12.08
Nikkei 225	42633.29	0.05	7.19	6.14	11.57
FTSE	9321.4	0.13	3.30	17.21	12.47
Hang Seng	25339.14	0.93	0.83	53.19	43.64
Taiwan	23764.47	-0.82	3.38	17.96	7.29

Global debt	22-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.26	4.33	4.35	4.54	4.21	3.86
UK 10-Year (%)	4.69	4.73	4.57	4.75	3.98	3.96
German 10-Year (%)	2.72	2.75	2.59	2.64	2.29	2.25
Japan 10-Year (%)	1.62	1.60	1.51	1.57	0.71	0.88

Domestic	22-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99358	0.21	-0.15	47.74	38.77
Silver (Rs / Kg)	113906	1.08	-0.51	53.66	34.29
Aluminium (Rs / Kg)	253	0.68	-0.63	21.39	8.79
Copper (Rs / kg)	880	0.33	-1.08	15.90	9.54
Lead (Rs / kg)	186	1.17	1.64	2.85	-4.72
Zinc (Rs /Kg)	272	0.93	0.46	24.46	-0.09
Nickel (Rs / kg)	1324	0.78	-1.47	-6.92	-5.91

Global	22-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3338.53	-0.21	-1.58	-0.21	32.86
Silver (oz/\$)	3810.00	0.85	-2.28	0.85	28.72
Brent (\$/bbl)	67.73	0.09	-1.25	0.09	-12.29
NYMEX crude (\$/bbl)	63.66	0.22	-2.53	0.22	-12.81

Global markets

- Wall Street stocks closed higher on Friday after Fed Chair signaled a possible September rate cut at the Jackson Hole Symposium.
- 10-year US bond yield ended lower at 4.26% after Fed Chair indicated that interest rate cuts could be on the horizon.
- FTSE index closed higher on Friday boosted by Fed Chair's imminent rate cut signal.
- Asian markets were trading higher at 8.30 AM.
- Fed Chair Jerome Powell struck a cautious tone on rate cuts at the Jackson Hole, citing heightened uncertainty from sweeping tax, trade, and immigration policy shifts.

Commodity

- Crude oil prices rose marginally by 14 cents to \$63.66 a barrel on the NYMEX amid Russia-Ukraine peace deal uncertainty.
- Domestic gold prices ended higher on Fed rate cut hopes.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Aug 25	US Chicago Fed National Activity Index, Jul	-0.10
Aug 26	US Richmond Fed Manufacturing Index, Aug	-20
Aug 27	China Industrial Profits (YTD), Jul	-1.8%
Aug 28	India Industrial Production, Jul	1.5%
Aug 29	India Government Budget Value, Jul	INR-280.73B

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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