

Daily Market Monitor

August 28, 2025

Domestic Market Performance

Indian market indices	26-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24712	-1.02	-0.50	10.68	-1.19
BSE Sensex	80787	-1.04	-0.83	9.69	-1.12
BSE 100	25875	-1.14	-0.60	11.08	-2.41
BSE 200	11194	-1.16	-0.78	10.83	-3.46
BSE 500	35756	-1.21	-1.03	11.59	-3.87
BSE SmallCap	52098	-1.68	-3.36	20.69	-6.63
BSE MidCap	45322	-1.34	-1.43	15.26	-6.82
BSE LargeCap	9514	-1.11	-0.61	9.59	-2.78
Sectoral indices					
BSE IT	35357	-0.63	0.73	-0.81	-16.69
BSE Oil & Gas	25864	-1.45	-4.31	-6.44	-20.54
BSE FMCG	20627	0.59	2.26	6.77	-10.95
BSE Auto	56728	-0.40	6.64	15.44	-3.28
BSE Bankex	60695	-1.25	-3.72	13.42	4.23
BSE Teck	17389	-0.76	-0.11	7.93	-10.32
BSE Capital Goods	65879	-1.48	-4.71	8.10	-10.34
BSE Consumer Durable	60070	-1.45	0.85	14.91	-6.12

Turnover (Rs Cr)	26-Aug	25-Aug
BSE Cash	8241	7130
NSE Cash	146511	81588
NSE F&O	17771227	13954929

Rs. Cr (Equity)	FII Inv 25-Aug	MF Inv 22-Aug	DII Inv 26-Aug
Buy	10,636	7,338	21,541
Sell	12,191	7,423	14,734
Net	-1,555	-84	6,808
Net (MTD)	-17,102	55,376	75,531
Net (YTD)	-113,545	338,028	476,726

	26-Aug	1Day	Month ago	Year ago
USD	87.74	87.42	86.52	83.89
GBP	118.11	118.22	116.79	110.65
Euro	102.04	102.43	101.73	93.75
100 Yen	59.42	59.39	58.87	58.27

Indian markets

- Indian equity benchmarks closed lower on Tuesday after the US announced a draft plan to levy tariffs of up to 50% on Indian goods effective from Wednesday.
- The top losers were Shriram Finance, Sun Pharma, Tata Seel, Bajaj Finance and Trent, which were down 2.36-4.21%.
- The top gainers were Eicher Motors, HUL, Maruti Suzuki, ITC and Nestle, which were up 0.80-2.68%.

Indian debt

- The interbank call money rate ended higher at 5.50% on Tuesday compared to 4.95% on Monday.
- Government bond prices ended flat on Tuesday as gains due to short covering were cut short following weak state debt auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.60% on Tuesday.

Indian Rupee

- The rupee weakened against the US dollar on Tuesday amid dented investor sentiment after a draft notice from the US government outlined plans to impose a 50% tariff on Indian products.

Regulatory

- The Reserve Bank of India launched the September 2025 round of its Urban and Rural Consumer Confidence Surveys to gauge households' views on the economy, jobs, income, prices and spending.
- The Reserve Bank of India has initiated its September 2025 round of the Inflation Expectations Survey of Households across 19 cities to gather insights on price movements and inflation perceptions.

Economy and Government

- Prime Minister Narendra Modi announced, India will gift 12 agricultural drones and two mobile soil testing laboratories to Fiji.
- Japanese Prime Minister Shigeru Ishiba plans to invest Yen 10 trillion (\$68 billion) to boost bilateral business ties with India over the next decade.
- The Union Cabinet approved four projects of the Ministry of Railways with a total cost of Rs 12,328 crore across multiple states.
- The Centre jacked up the collateral-free loan amount extended to street vendors by Rs 5000 and also assured them of UPI-linked RuPay credit cards as it revamped and extended the PM SVANidhi scheme till March 31, 2030.
- The Bihar government announced a new policy under which free land and interest subvention of up to Rs 40 crore would be provided to those investing in the industrial sector.

Domestic Debt Market Indicators

Instrument	26-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.50%	4.95%	5.00%	5.85%	6.24%	5.75%
3-Month T-Bill	5.48%	5.48%	5.36%	5.63%	6.93%	6.61%
6-Month T-Bill	5.57%	5.56%	5.49%	5.66%	7.04%	6.70%
1-year T-Bill	5.58%	5.59%	5.54%	5.67%	7.07%	6.72%
3-Month CD	5.77%	5.74%	5.74%	6.15%	7.55%	7.19%
6-Month CD	6.05%	6.03%	6.00%	6.52%	7.37%	7.44%
1-year CD	6.34%	6.33%	6.23%	6.50%	7.62%	7.59%
3-Month CP	6.29%	6.29%	6.15%	6.49%	8.15%	7.67%
6-Month CP	6.47%	6.47%	6.30%	6.92%	7.71%	7.78%
1-year CP	6.72%	6.72%	6.65%	6.87%	8.10%	7.87%
1-year Gilt	5.62%	5.62%	5.58%	5.72%	7.14%	6.73%
3-year Gilt	6.04%	6.02%	5.85%	5.75%	7.16%	6.75%
5-year Gilt	6.39%	6.38%	6.09%	5.84%	7.05%	6.77%
1-year AAA	6.68%	6.63%	6.50%	6.56%	7.70%	7.64%
3-year AAA	6.86%	6.81%	6.68%	6.60%	7.70%	7.58%
5-year AAA	6.90%	6.85%	6.72%	6.72%	7.70%	7.48%
10-year G-sec	6.62%	6.59%	6.35%	6.25%	7.05%	6.85%
Net LAF (Rs Cr)	179528	164116	287764	169815	-73145	82235
Forex reserves (\$ bn)	695.11	693.62	695.49	685.73	642.49	674.66

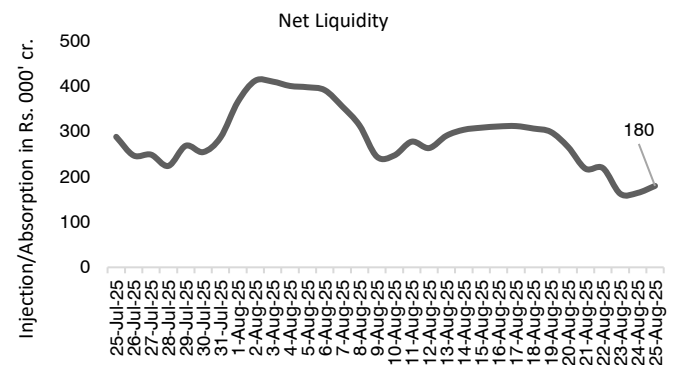
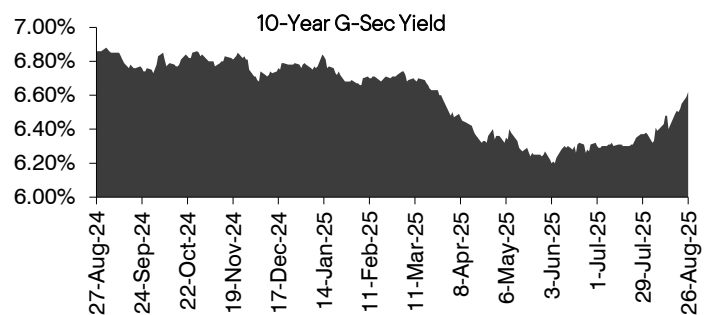
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.57	6.31	7.02	7.06	8.29	8.82
1 Year	5.62	6.68	7.39	7.43	8.66	9.19
3 Year	6.04	6.86	7.57	7.61	8.84	9.37
5 Year	6.39	6.90	7.71	7.74	8.98	9.51
10 Year	6.62	7.14	7.95	7.98	9.22	9.75

Rs. Cr (Debt)	FII Inv 25-Aug	MF Inv 22-Aug
Buy	1,404	13,543
Sell	1,030	14,512
Net	374	-969
Net (MTD)	7,164	-49,888
Net (YTD)	8,265	-398,049

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

- VVIP Infratech raised Rs .100 crore through qualified institutions placement.
- Anmasa raised \$1.1 million in a pre-seed funding round led by Snow Leopard Technology Ventures, Veltis Capital, Blume Ventures, and Indigram Lab, with participation from undisclosed angel investors.
- Ardee Engineering received SEBI's go ahead to raise Rs 580 crore through an initial public offering (IPO).
- Acme Solar Holdings board approved a proposal to raise Rs 3,000 crore in multiple tranches.
- TransBnk raised \$25 million in funding led by Bessemer Venture Partners to fuel its expansion into Southeast Asia and the Middle East.



Global market indices	27-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	45565.23	0.32	1.48	14.46	10.46
Nikkei 225	42520.27	0.30	2.57	5.86	11.05
FTSE	9255.5	-0.11	1.48	16.38	10.90
Hang Seng	25201.28	-1.27	-0.74	52.35	40.99
Taiwan	24519.9	0.88	4.95	21.71	10.52

Global debt	27-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.24	4.26	4.40	4.43	4.21	3.83
UK 10-Year (%)	4.73	1.63	4.62	4.67	3.98	4.00
German 10-Year (%)	2.72	2.72	2.72	2.53	2.29	2.28
Japan 10-Year (%)	1.62	4.73	1.60	1.48	0.71	0.89

Domestic	26-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	100884	0.39	2.54	50.01	40.03
Silver (Rs / Kg)	115870	-0.23	1.34	56.31	34.43
Aluminium (Rs / Kg)	253	-0.16	-1.13	21.51	8.80
Copper (Rs / kg)	894	1.15	-0.42	17.81	11.22
Lead (Rs / kg)	182	-0.47	-2.89	0.53	-7.39
Zinc (Rs /Kg)	271	0.48	-1.00	24.23	-1.15
Nickel (Rs / kg)	1337	0.80	-1.05	-5.95	-5.85

Global	26-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3383.91	0.33	0.44	54.44	34.49
Silver (oz/\$)	3856.00	-0.44	-1.10	56.94	29.09
Brent (\$/bbl)	68.05	1.23	-0.57	-22.21	-14.46
NYMEX crude (\$/bbl)*	64.15	1.42	-1.55	-22.87	-15.07

Global markets

- Wall Street stocks closed higher on Wednesday buoyed by anticipation of Nvidia's quarterly earnings.
- 10-year US bond yield ended lower at 4.24% due to Fed rate cut hopes.
- FTSE index closed marginally lower on Wednesday dragged down by financial stocks as investors were cautious over Fed independence concerns.
- Asian markets were trading higher at 8.30 AM.
- US durable goods orders fell by 2.8% from the previous month to \$302.8 billion in July 2025 compared to the revised 9.4% slump in June 2025.
- US Case Shiller Home Price Index rose 2.1% in June 2025 compared to a 2.8% increase in May 2025.
- US House Price Index decreased to 2.60% in June compared to 2.90% in May 2025.
- US Richmond Fed Manufacturing Index rose by 13 points to -7 in August 2025 compared to -20 in July 2025.
- China's industrial profit fell 1.7% year-on-year to CNY 4.02 trillion in the first seven months of 2025, after a 1.8% decline in the first half of the year.

Commodity

- Crude oil prices rose by 90 cents to \$64.15 a barrel on the NYMEX after a drop in US crude stocks while investors assessed the impact of new US tariffs on India.
- Domestic gold prices ended higher due to weakness in dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Aug 28	US GDP Growth Rate QoQ 2nd Est Q2	-0.5%
Aug 28	India Industrial Production, Jul	1.5%
Aug 29	India GDP Growth Rate Q2	7.4%
Aug 29	India Government Budget Value, Jul	INR-280.73B
Aug 29	US PCE Price Index, July	2.6%

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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