Daily Market Monitor

September 8, 2025

TATA mutual fund

Domestic Market Performance

Indian market indices	5-Sep	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24741	0.03	0.37	10.81	-1.61
BSE Sensex	80711	-0.01	0.00	9.58	-1.81
BSE 100	25904	-0.02	0.27	11.20	-2.95
BSE 200	11208	-0.02	0.12	10.98	-3.95
BSE 500	35842	-0.01	0.14	11.86	-4.41
BSE SmallCap	52752	0.09	-0.15	22.21	-6.67
BSE MidCap	45460	-0.10	-0.30	15.61	-7.60
BSE LargeCap	9525	0.01	0.32	9.72	-3.22
Sectoral indices					
BSE IT	34049	-1.25	-1.22	-4.48	-21.37
BSE Oil & Gas	25842	-0.08	-1.18	-6.52	-20.28
BSE FMCG	20739	-1.22	1.05	7.35	-10.85
BSE Auto	58883	1.30	10.35	19.82	0.80
BSE Bankex	60501	0.03	-1.82	13.05	3.56
BSE Teck	16850	-0.70	-1.35	4.59	-14.81
BSE Capital Goods	66853	-0.25	-2.69	9.70	-7.63
BSE Consumer Durable	62399	0.10	3.97	19.36	-3.10

Turnover (Rs Cr)	5-Sep	4-Sep
BSE Cash	7305	8497
NSE Cash	81938	105477
NSE F&O	24182560	14704558

Rs. Cr (Equity)	FII Inv 4-Sep	MF Inv 2-Sep	DII Inv 5-Sep
Buy	12,336	9,049	10,031
Sell	13,020	8,375	8,257
Net	-685	673	1,774
Net (MTD)	-3,274	3,953	13,374
Net (YTD)	-137,540	357,140	508,086

	5-Sep	1Day	Month ago	Year ago
USD	88.32	88.16	87.79	83.98
GBP	118.92	118.43	116.62	110.52
Euro	103.08	102.75	101.42	93.18
100 Yen	59.59	59.49	59.68	58.49

Indian markets

- Indian equity benchmarks closed flat on Friday as profit booking, US tariff concerns and persistent foreign outflows offset gains from positive global cues and hopes of rate cuts by the US Federal Reserve (Fed).
- The top gainers were, Eicher Motors, Mahindra & Mahindra, Maruti Suzuki, Power Grid Corporation and Dr Reddy's Labs, up 1.21-2.42%.
- The top losers were ITC, HCL Tech, Cipla, TCS and Tech Mahindra, down 1.50-2.06%.

Indian debt

- The interbank call money rate ended lower at 5.00% on Friday compared to 5.50% on Thursday.
- Government bond prices rose on Friday after Union Finance Minister reaffirmed commitment to the fiscal deficit target.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.47% on Friday compared to 6.49% on Thursday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday due to foreign portfolio investor outflows and fears of further US tariffs against India.

Regulatory

- The Securities and Exchange Board of India (Sebi) cautioned investors against fraudsters impersonating Sebi officials and using the regulator's letterhead, logo, and seal in fraudulent communications.
- Sebi issued a circular to streamline the process for surrendering KYC registration to ensure an orderly winding down of such agencies' operations while safeguarding investors' interests.
- The Securities and Exchange Board of India (Sebi) is expected to clear a wide range of reforms at its upcoming board meeting on September 12.

Economy and Government

- Chief Economic Adviser V Anantha Nageswaran said, given the expectation of benign inflation, there may be a shortfall in nominal GDP growth compared to the Budget estimate of 10.1% for the current financial year.
- India's forex reserves jumped by $ 3.51 billion to $ 694.23 billion for the week ended August 29.
- Finance Minister Nirmala Sitharaman said the recent Goods and Services Tax (GST) overhaul is not limited to rate reductions but is designed to make life easier for both businesses and consumers.
- The Andhra Pradesh cabinet approved a proposal to invite tender from insurance companies to extend universal health policy, which will offer healthcare services up to Rs 25 lakh.
- Bihar Chief Minister Nitish Kumar launched projects worth around Rs 1,159.84 crore in Patna district.

Domestic Debt Market Indicators

Instrument	5-Sep	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.50%	4.90%	5.55%	6.24%	6.24%
3-Month T-Bill	5.48%	5.51%	5.38%	5.55%	6.93%	6.63%
6-Month T-Bill	5.60%	5.60%	5.46%	5.55%	7.04%	6.71%
1-year T-Bill	5.63%	5.63%	5.47%	5.56%	7.07%	6.72%
3-Month CD	5.81%	5.81%	5.73%	6.07%	7.55%	7.25%
6-Month CD	6.13%	6.13%	5.99%	6.29%	7.37%	7.49%
1-year CD	6.38%	6.38%	6.22%	6.32%	7.62%	7.65%
3-Month CP	6.45%	6.45%	6.18%	6.36%	8.15%	7.64%
6-Month CP	6.55%	6.55%	6.36%	6.65%	7.71%	7.88%
1-year CP	6.80%	6.80%	6.65%	6.84%	8.10%	7.90%
1-year Gilt	5.64%	5.64%	5.56%	5.60%	7.14%	6.75%
3-year Gilt	6.07%	6.11%	5.81%	5.71%	7.16%	6.74%
5-year Gilt	6.22%	6.27%	6.08%	5.84%	7.05%	6.76%
1-year AAA	6.77%	6.70%	6.48%	6.58%	7.70%	7.65%
3-year AAA	6.89%	6.90%	6.66%	6.62%	7.70%	7.58%
5-year AAA	6.94%	6.95%	6.70%	6.73%	7.70%	7.48%
10-year G-sec	6.46%	6.50%	6.33%	6.20%	7.05%	6.85%
Net LAF (Rs Cr)	286955	297367	397133	303363	-73145	255297
Forex reserves ($ bn)	694.23	690.72	698.19	692.72	642.49	681.69

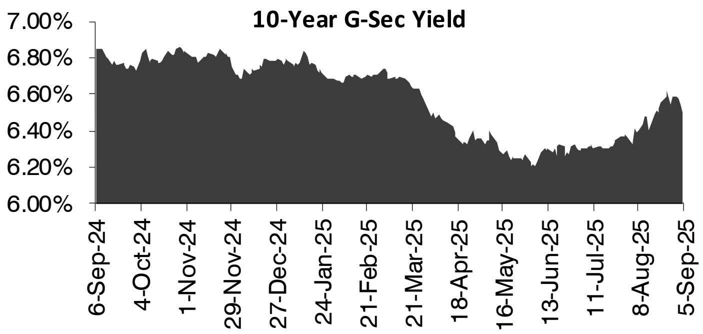
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.60	6.45	7.16	7.20	8.43	8.96
1 Year	5.64	6.77	7.48	7.52	8.75	9.28
3 Year	6.07	6.89	7.60	7.64	8.87	9.40
5 Year	6.22	6.94	7.75	7.78	9.02	9.55
10 Year	6.46	7.23	8.04	8.07	9.31	9.84

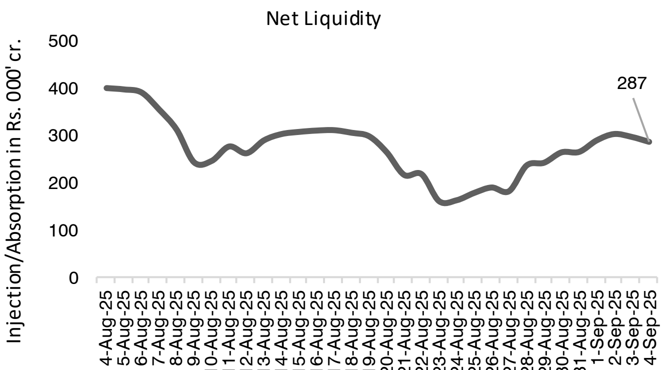
Rs. Cr (Debt)	FII Inv 4-Sep	MF Inv 2-Sep
Buy	305	16,975
Sell	449	21,556
Net	-144	-4,580
Net (MTD)	-69	-7,020
Net (YTD)	5,985	-420,470

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	3.5% (Jul-25)	2.6% (Apr-25)	5.0% (Jul-24)
GDP	7.8% (Apr-Jun FY26)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY25)
India Manufactung PMI	59.3 (Aug-25)	57.6 (May-25)	57.5 (Aug- 24)
India Service PMI	62.90 (Aug-25)	58.8 (May-25)	60.9 (Aug-24)
Bank Credit Growth*	0.53% (Aug 08, 2025)	0.10% (July 25, 2025)	
Bank Deposit Growth*	0.56% (Aug 08, 2025)	0.21% (July 25, 2025)	

Capital markets

- Chartered Speed Ltd has filed preliminary papers with markets regulator Sebi to raise Rs 855 crore through an initial public offering (IPO).
- Knack Packaging filed draft papers with Sebi to raise Rs 475 cr through an Initial Public Offering (IPO) to support its expansion plans.
- Edtech unicorn PhysicsWallah has filed updated draft papers with Sebi to raise Rs 3,820 crore through an initial public offering (IPO) for expansion and growth initiatives.
- Karbonsteel Engineering raised close to Rs 17 crore from anchor investors ahead of its upcoming initial public offering (IPO).
- Amber Enterprises plans to raise a total of Rs 1,200 crore from private equity investors through issuance of equity shares and compulsorily convertible preference shares in its subsidiary ILJIN Electronics.





Global market indices	5-Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	45400.86	-0.48	2.92	14.05	11.40
Nikkei 225	43018.75	1.03	6.09	7.10	17.35
FTSE	9208.21	-0.09	0.72	15.79	11.73
Hang Seng	25417.98	1.43	2.07	53.66	45.71
Taiwan	24494.58	1.30	3.52	21.58	15.61

Global debt	5-Sep	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.10	4.17	4.22	4.40	4.21	3.73
UK 10-Year (%)	4.66	4.71	4.52	4.59	3.98	3.92
German 10-Year (%)	2.66	2.72	2.62	2.59	2.29	2.21
Japan 10-Year (%)	1.57	1.60	1.47	1.47	0.71	0.88

Domestic	5-Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	106338	0.37	6.26	58.12	47.95
Silver (Rs / Kg)	123170	-0.03	9.56	66.16	48.45
Aluminium (Rs / Kg)	256	0.29	1.31	23.03	16.13
Copper (Rs / kg)	906	0.29	2.17	19.31	15.29
Lead (Rs / kg)	185	-0.27	-0.14	2.30	-7.18
Zinc (Rs /Kg)	278	0.69	2.45	27.30	6.42
Nickel (Rs / kg)	1350	0.97	1.81	-5.06	-0.71

Global	5-Sep	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3549.30	-0.63	5.23	61.99	42.20
Silver (oz/$)	4075.00	-1.40	9.28	65.85	44.15
Brent ($/bbl)	65.50	-2.22	-3.16	-25.13	-9.89
NYMEX crude ($/bbl)	61.87	-2.54	-5.05	-25.61	-10.53

Upcoming market indicators

Date	Indicator	Previous
Sep 8	China Balance of Trade, August	4.1%
Sep 10	US PPI, Aug	3.3%
Sep 11	US Inflation Rate, Aug	2.7%
Sep 12	UK GDP, Jul	1.4%
Sep 15	India WPI inflation, August	-0.58%

Global markets

- Wall Street stocks closed lower on Friday dragged down by banking stocks as sharp weakness in August job growth fueled economic worries.
- 10-year US bond yield ended lower at 4.10% due to weak nonfarm payroll numbers for August month.
- FTSE index closed lower on Friday weighed down by energy and banking stocks as investors digested domestic and US economic data.
- Asian markets were trading higher at 8.30 AM.
- US nonfarm payrolls rose by 22,000 in August 2025, compared to an upwardly revised 79,000 in July 2025.
- US unemployment rate rose to 4.3% in August 2025 compared to 4.2% in July 2025.
- The Eurozone economy expanded 1.5% year-on-year in the second quarter of 2025, compared to an upwardly revised 1.6% in Q1.
- UK Retail Sales increased 1.1% year-on-year in July 2025 compared to a downwardly revised 0.9% gain in June 2025.
- UK Halifax House Price Index rose 2.2% year-on-year in August 2025, compared to 2.5% in July 2025.
- The Japanese economy grew by 2.2% on an annualized basis in Q2 2025 compared to a downwardly revised 0.3% increase in Q1.
- Japan Bank Lending rose 3.6% in August 2025, accelerating compared to a 3.2% gain in July 2025.

Commodity

- Crude oil prices fell by $1.61 to $61.87 a barrel on the NYMEX on demand concerns following weak US jobs data.
- Opec+ has agreed in principle to increase production again next month, according to delegates, as the group doubles down on its policy shift to pursue market share instead of defending prices.
- Domestic gold prices ended higher as weak US economic data boosted hopes for Fed rate cut in the next policy meet.

Forthcoming results

NA	NA

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	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24
Debt Indicators	Currency in circulation (Rs billion)	38116	38147	38372	38344	37762	36997	36444	35893	35643	35,589
	Repo rate	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%
	Call rate	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%
	Forex reserves ($ billion; mthly. avg.)	692	698	699	689	682	656	638	629	648	666
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	1876.84	2675.69	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7
	IIP, %y/y	NA	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%
	Exports, $ billion	NA	37.24	35.14	38.73	38.49	41.97	36.91	36.43	38.01	32.11
	Imports, $ billion	NA	64.59	53.92	60.61	64.91	63.51	50.96	59.42	59.95	69.95
	Manufacturing PMI	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5
	Services PMI	65.6	60.5	60.4	58.8	58.7	58.5	59	56.5	59.3	58.4
	GST collections (Rs crore)	186315	195735	184597	201050	236716	196141	183646	195506	176857	182,269
	India crude oil import (mbpd)	NA	18.56	20.32	21.3	21.0	22.7	19.1	21.2	20.2	19.07
Sector update	Auto – Passenger vehicles	NA	0%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%	9.8%	20.7%
	Auto – Two-wheelers	NA	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%
	Auto – Commercial vehicles	NA	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%
	Auto – Tractors	NA	8%	10.50%	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%
	Infra – Coal	NA	-12.30%	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%
	Infra – Electricity	NA	0.50%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%	6.2%	4.40%
	Infra – Steel	NA	12.80%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%	7.3%	10.5%
	Infra – Cement	NA	11.70%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%	10.3%	13.10%