

Daily Market Monitor

November 11, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	10-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25574	0.32	1.14	8.74	5.91
BSE Sensex	83535	0.38	1.25	7.91	5.09
BSE 100	26847	0.33	1.32	9.23	5.27
BSE 200	11623	0.36	1.34	9.62	4.63
BSE 500	37024	0.33	1.08	10.26	3.81
BSE SmallCap	52901	-0.28	-0.89	13.43	-3.67
BSE MidCap	47056	0.62	1.50	13.30	2.12
BSE LargeCap	9854	0.32	1.16	9.08	5.05
Sectoral indices					
BSE IT	34968	1.57	-0.05	-3.20	-16.70
BSE Oil & Gas	28668	0.05	4.77	14.06	4.92
BSE FMCG	20339	-0.11	0.53	4.59	-5.00
BSE Auto	59941	0.28	0.53	25.65	10.92
BSE Bankex	64995	-0.03	1.76	9.16	10.43
BSE Teck	17592	1.43	1.59	1.40	-7.82
BSE Capital Goods	70226	1.24	0.97	11.96	1.07
BSE Consumer Durable	60341	0.62	1.28	10.96	-2.12

Turnover (Rs Cr)	10-Nov	7-Nov
BSE Cash	8143	8091
NSE Cash	101318	118391
NSE F&O	24626512	23545798

Rs. Cr (Equity)	FII Inv 7-Nov	MF Inv 6-Nov	DII Inv 10-Nov
Buy	22,237	14,650	17,290
Sell	14,498	11,527	11,478
Net	7,739	3,123	5,812
Net (MTD)	2,757	4,839	21,077
Net (YTD)	-142,228	427,530	629,683

	10-Nov	1Day	Month ago	Year ago
USD	88.68	88.71	88.69	84.37
GBP	116.66	116.37	118.01	109.35
Euro	102.53	102.30	102.62	90.95
100 Yen	57.59	57.81	58.02	55.40

Indian markets

- Indian equity benchmarks closed higher on Monday, on hopes of a resolution of the US government shutdown and strong corporate earnings.
- The top gainers were Infosys, HCL Technologies, Bajaj Finance, Wipro and Coal India, up 1.42-2.49%.
- The top losers were Trent, Max Healthcare, Tata Consumer Products, Eternal and Apollo Hospitals, down 1.47-7.43%.

Indian debt

- The interbank call money rate ended lower at 4.95% on Monday compared to 5.40% on Friday.
- Government bond prices rose on Monday amid expectations of continued RBI bond buying.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.50% on Monday compared to 6.51% on Friday.

Indian Rupee

- The rupee ended higher against the US dollar on Monday, on suspected Reserve Bank of India intervention.

Regulatory

- According to the data released by the Reserve Bank of India, amid a record rise in spending during the festival season, coupled with rationalisation in rates of goods and services tax (GST), lenders in September saw 15% year-on-year growth in average credit-card expenditure.
- The Securities Exchange Board of India (SEBI) has cautioned investors about investing in digital gold products, saying that these investments are different from the SEBI-regulated gold products and may expose investors to operational risks.

Economy and Government

- India's unemployment rate fell to 5.2% in the July-September quarter from 5.4% in the previous three months
- India and Vietnam inked a pact to set up a framework for submarine search, rescue and support mechanism in case of any eventualities.
- The Consumer Affairs Ministry proposed to make it mandatory for e-commerce platforms to provide searchable and sortable filters based on 'country of origin' for packaged commodities, a move aimed at enhancing transparency at digital marketplaces.
- Chhattisgarh government has implemented credit card, debit card, and UPI (Unified Payments Interface) payment options for filing GST returns across the state.

Domestic Debt Market Indicators

Instrument	10-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.40%	5.00%	5.00%	7.00%	6.55%
3-Month T-Bill	5.41%	5.43%	5.43%	5.43%	6.34%	6.44%
6-Month T-Bill	5.55%	5.55%	5.52%	5.50%	6.47%	6.58%
1-year T-Bill	5.55%	5.56%	5.55%	5.54%	6.40%	6.55%
3-Month CD	6.03%	6.01%	5.95%	5.78%	7.00%	7.16%
6-Month CD	6.23%	6.22%	6.19%	6.03%	7.25%	7.38%
1-year CD	6.39%	6.42%	6.37%	6.30%	7.15%	7.50%
3-Month CP	6.58%	6.56%	6.55%	6.18%	7.25%	7.48%
6-Month CP	6.72%	6.72%	6.72%	6.36%	7.55%	7.75%
1-year CP	6.92%	6.92%	6.90%	6.70%	7.45%	7.80%
1-year Gilt	5.58%	5.58%	5.58%	5.62%	6.40%	6.70%
3-year Gilt	5.90%	5.90%	5.91%	5.90%	6.44%	6.71%
5-year Gilt	6.15%	6.16%	6.14%	6.15%	6.45%	6.75%
1-year AAA	6.65%	6.64%	6.62%	6.51%	7.29%	7.57%
3-year AAA	6.83%	6.83%	6.86%	6.69%	7.11%	7.35%
5-year AAA	6.87%	6.87%	6.90%	6.73%	7.11%	7.30%
10-year G-sec	6.49%	6.52%	6.53%	6.40%	6.58%	6.77%
Net LAF (Rs Cr)	243410	240975	143999	312789	-9354	216029
Forex reserves (\$ bn)	689.73	695.36	699.96	688.87	642.49	682.13

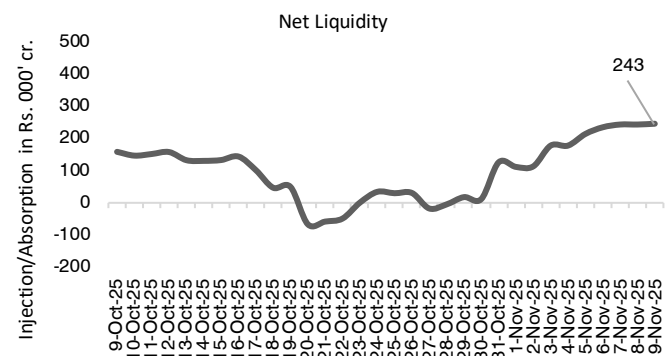
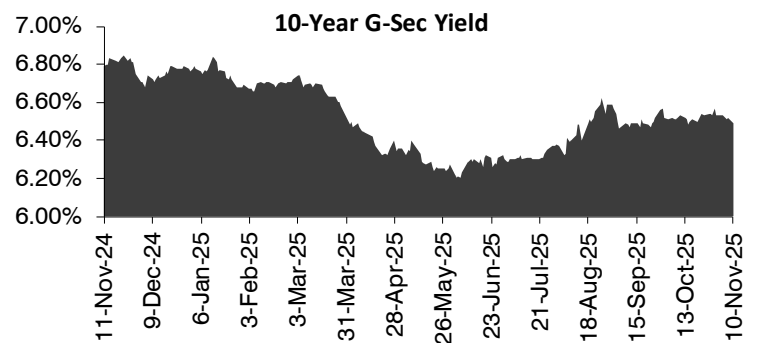
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.48	7.19	7.23	8.46	8.99
1 Year	5.58	6.65	7.36	7.40	8.63	9.16
3 Year	5.90	6.83	7.54	7.58	8.81	9.34
5 Year	6.15	6.87	7.68	7.71	8.95	9.48
10 Year	6.49	7.17	7.98	8.01	9.25	9.78

Rs. Cr (Debt)	FII Inv 7-Nov	MF Inv 6-Nov
Buy	257	15,267
Sell	373	21,635
Net	-116	-6,368
Net (MTD)	-1,746	-8,097
Net (YTD)	10,682	-483,941

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.54% (Sep-25)	2.10% (Jun-25)	5.49% (Sep-24)
WPI	0.13% (Sep-25)	-0.19% (Jun-25)	1.84% (Sep-24)
IIP	4.0% (Sep-25)	1.5% (Jun-25)	3.2% (Sep-24)
GDP	7.8% (Apr-Jun FY26)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY25)
India Manufacturing PMI	59.2 (Oct-25)	59.1 (Jul-25)	59.2 (Oct-24)
India Service PMI	58.9 (Oct-25)	60.5 (July-25)	58.9 (Oct-24)
Bank Credit Growth*	-0.89% (Oct 17, 2025)		2.35% (Oct 03, 2025)
Bank Deposit Growth*	-0.28% (Oct 17, 2025)		1.92% (Oct 03, 2025)

Capital markets

- Hindustan Aeronautics Limited (HAL) signed an agreement with General Electric, USA, to supply 113 F404-GE-IN20 engines for 97 LCA Mk1A aircraft.
- JK Tyre and Industries plans to invest another Rs 5,000 crore over the next 5-6 years to expand its production capacity, including some dedicated lines for export markets.
- GHCL Ltd partnered with authentication solutions provider AuthBridge to enhance environmental, social and governance (ESG) compliance across its supplier network
- Clean Max Enviro Energy Solutions received the Sebi approval to launch its Rs 5,200 crore IPO.
- Rossell Techsys board has approved a proposal to raise up to Rs 300 crore through various instruments, including QIP, to fuel its next phase of growth.



Global market indices	10-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47368.63	0.81	4.15	12.78	7.68
Nikkei 225	50911.76	1.26	5.87	42.94	28.89
FTSE	9787.15	1.08	3.82	14.03	21.24
Hang Seng	26649.06	1.55	1.36	15.27	28.56
Taiwan	27869.51	0.79	2.42	34.66	18.32

Global debt	10-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.13	4.11	4.05	4.27	4.23	4.30
UK 10-Year (%)	4.46	4.47	4.67	4.56	4.68	4.43
German 10-Year (%)	2.67	2.67	2.63	2.64	2.73	2.36
Japan 10-Year (%)	1.70	1.68	1.69	1.47	1.49	1.00

Domestic	10-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	122441	1.95	0.75	37.32	58.23
Silver (Rs / Kg)	151643	2.29	-7.82	50.30	66.40
Aluminium (Rs / Kg)	275	0.82	3.34	9.72	13.03
Copper (Rs / kg)	1009	0.70	0.35	12.27	20.78
Lead (Rs / kg)	185	0.43	0.30	-0.83	0.79
Zinc (Rs / Kg)	313	1.05	5.52	14.23	10.26
Nickel (Rs / kg)	1339	-0.06	-1.30	-5.40	-3.89

Global	10-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4001.21	0.44	0.40	29.03	48.31
Silver (oz/\$)	4830.00	0.25	-3.75	41.56	52.08
Brent (\$/bbl)	64.06	0.68	2.12	-14.32	-13.28
NYMEX crude (\$/bbl)	60.13	0.64	2.09	-15.88	-14.53

Upcoming market indicators

Date	Indicator	Previous
Nov 11	UK Unemployment Rate, Sep	4.8%
Nov 12	India Inflation Rate, Oct	1.54%
Nov 13	UK GDP, Sep	1.3%
Nov 14	India WPI Inflation, Oct	0.13%
Nov 15	India Unemployment Rate, Oct	5.2%

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. #flash PMI numbers

Global markets

- Wall Street stocks closed higher on Monday lifted by strong gains in AI related stocks and progress in ending the record-long government shutdown.
- 10-year US bond yield ended higher at 4.13% amid potential end to government shutdown.
- FTSE index closed higher on Monday boosted by global optimism over a possible end to the US government shutdown.
- Asian markets were trading mixed at 8.30 AM.
- Japan coincident economic index rose to 114.6 in September 2025 compared to 112.8 in August 2025.
- Japan leading economic index rose to 108.0 in September 2025 compared to 107.0 in August 2025.

Commodity

- Crude oil prices rose by 38 cents to \$60.13 a barrel on the NYMEX on concerns over potential supply disruptions from new US sanctions.
- Domestic gold prices rose amid growing expectations of another U.S. Federal Reserve interest rate cut in December .

Forthcoming results

Date	Company
10-Nov	Bajaj Finance Limited
10-Nov	Oil And Natural Gas Corporation Ltd

	Indicators	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25
Debt Indicators	Currency in circulation (Rs billion)	38184	38071	38097	38147	38372	38344	37762	36997	36444	35893
	Repo rate	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%
	10-year G-sec yield	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%
	Call rate	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%
	Forex reserves (\$ billion; mthly. avg.)	699	701	693	698	699	689	682	656	638	629
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18	1773.1	2554.5
	IIP, %y/y	NA	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%
	Exports, \$ billion	NA	36.38	35.1	37.24	35.14	38.73	38.49	41.97	36.91	36.43
	Imports, \$ billion	NA	68.53	61.59	64.59	53.92	60.61	64.91	63.51	50.96	59.42
	Manufacturing PMI	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7
	Services PMI	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5	59	56.5
	GST collections (Rs crore)	195936	189017	186315	195735	184597	201050	236716	196141	183646	195506
	India crude oil import (mbpd)	NA	19.934	19.6	18.56	20.32	21.3	21.0	22.7	19.1	21.2
Sector update	Auto – Passenger vehicles	NA	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%
	Auto – Two-wheelers	NA	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%
	Auto – Commercial vehicles	NA	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%
	Auto – Tractors	NA	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%	13.60%	11.39%
	Infra – Coal	NA	-1.20%	11.40%	-	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%
	Infra – Electricity	NA	2.1%	3.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%
	Infra – Steel	NA	14.10%	14.20%	16.60%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%
	Infra – Cement	NA	5.30%	6.10%	11.60%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%

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