

Daily Market Monitor

November 12, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	11-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25695	0.47	1.62	9.25	6.44
BSE Sensex	83871	0.40	1.66	8.34	5.50
BSE 100	26961	0.42	1.75	9.70	5.75
BSE 200	11673	0.43	1.77	10.08	5.19
BSE 500	37157	0.36	1.44	10.66	4.43
BSE SmallCap	52853	-0.09	-0.98	13.33	-2.64
BSE MidCap	47152	0.20	1.70	13.53	3.14
BSE LargeCap	9897	0.43	1.60	9.55	5.49
Sectoral indices					
BSE IT	35342	1.07	1.02	-2.16	-16.65
BSE Oil & Gas	28872	0.71	5.52	14.88	6.51
BSE FMCG	20386	0.23	0.77	4.83	-3.92
BSE Auto	60542	1.00	1.54	26.91	12.79
BSE Bankex	65231	0.36	2.13	9.55	10.22
BSE Teck	17788	1.12	2.73	2.53	-7.51
BSE Capital Goods	71062	1.19	2.17	13.29	2.62
BSE Consumer Durable	60418	0.13	1.41	11.10	-1.65

Turnover (Rs Cr)	11-Nov	10-Nov
BSE Cash	7190	8143
NSE Cash	104375	101318
NSE F&O	66208370	24626512

Rs. Cr (Equity)	FII Inv 10-Nov	MF Inv 7-Nov	DII Inv 11-Nov
Buy	9,384	15,760	13,725
Sell	14,419	9,765	11,871
Net	-5,035	5,995	1,854
Net (MTD)	-2,278	10,833	22,931
Net (YTD)	-147,262	433,525	631,537

	11-Nov	1Day	Month ago	Year ago
USD	88.70	88.68	88.69	84.39
GBP	116.80	116.66	118.01	108.88
Euro	102.54	102.53	102.62	90.21
100 Yen	57.53	57.59	58.02	54.88

Indian markets

- Indian equity benchmarks closed higher on Tuesday, driven by hopes of a possible trade deal between India and the US and a likely end to the US government shutdown.
- The top gainers were Interglobe Aviation, Bharat Electronics, M&M, Adani Ports, HCL Technologies, up 1.91-3.47%.
- The top losers were Bajaj Finance, Bajaj Finserv, ONGC, TMPV and Apollo Hospital, down 0.38-7.35%.

Indian debt

- The interbank call money rate ended lower at 4.90% on Tuesday compared to 4.95% on Monday.
- Government bond prices fell marginally on Tuesday as investors remained cautious about potential US-India trade deal, which could impact the RBI's policy rate decision.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.51% on Tuesday compared to 6.50% on Monday.

Indian Rupee

- The rupee ended almost flat against the US dollar on Tuesday due to dollar sales from state-run banks and investor expectation that the US-India trade negotiations will result in deal.

Regulatory

- The Reserve Bank of India (RBI) recognised the Self-Regulated PSO Association (SRPA) as a self-regulatory body for the payment system operators (PSO) sector.
- The Insurance Regulatory and Development Authority of India (Irdai) is closely monitoring gaps in health insurance claim settlement, where the number of claims settled is high, but the amount settled vis-à-vis the amount claimed remains lower than expected.

Economy and Government

- India's net direct tax collection rose 7% year-on-year to over Rs 12.92 trillion between April 1 and November 10, helped by higher corporate tax receipts and a drop in refund payouts.

Domestic Debt Market Indicators

Instrument	11-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.90%	4.95%	5.00%	5.00%	7.00%	5.50%
3-Month T-Bill	5.44%	5.41%	5.43%	5.44%	6.34%	6.46%
6-Month T-Bill	5.56%	5.55%	5.52%	5.51%	6.47%	6.58%
1-year T-Bill	5.55%	5.55%	5.55%	5.51%	6.40%	6.56%
3-Month CD	6.00%	6.03%	5.95%	5.80%	7.00%	7.17%
6-Month CD	6.22%	6.23%	6.19%	6.04%	7.25%	7.38%
1-year CD	6.39%	6.39%	6.37%	6.30%	7.15%	7.50%
3-Month CP	6.56%	6.58%	6.55%	6.28%	7.25%	7.45%
6-Month CP	6.74%	6.72%	6.72%	6.39%	7.55%	7.75%
1-year CP	6.87%	6.92%	6.90%	6.72%	7.45%	7.79%
1-year Gilt	5.54%	5.58%	5.58%	5.62%	6.40%	6.71%
3-year Gilt	5.90%	5.90%	5.91%	5.95%	6.44%	6.72%
5-year Gilt	6.16%	6.15%	6.14%	6.21%	6.45%	6.76%
1-year AAA	6.55%	6.65%	6.62%	6.54%	7.29%	7.57%
3-year AAA	6.70%	6.83%	6.86%	6.72%	7.11%	7.35%
5-year AAA	6.77%	6.87%	6.90%	6.76%	7.11%	7.30%
10-year G-sec	6.50%	6.49%	6.53%	6.43%	6.58%	6.79%
Net LAF (Rs Cr)	201366	243410	143999	277142	-9354	198705
Forex reserves (\$ bn)	689.73	695.36	699.96	688.87	642.49	682.13

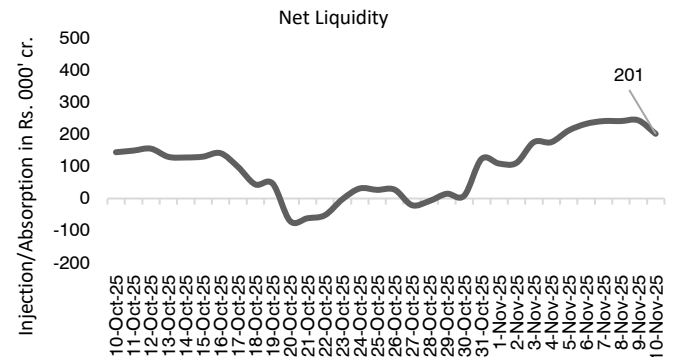
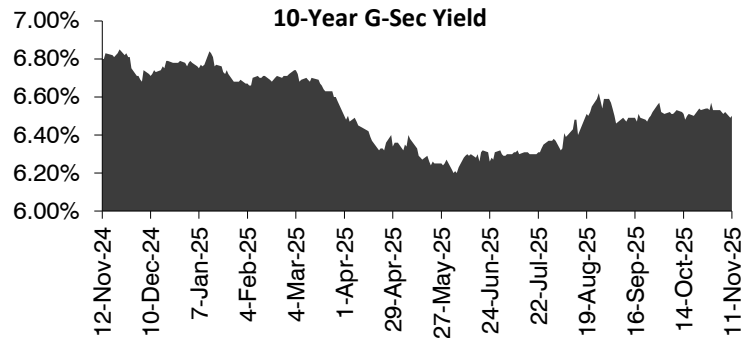
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.56	6.47	7.18	7.22	8.45	8.98
1 Year	5.54	6.55	7.26	7.30	8.53	9.06
3 Year	5.90	6.70	7.41	7.45	8.68	9.21
5 Year	6.16	6.77	7.58	7.61	8.85	9.38
10 Year	6.50	7.10	7.91	7.94	9.18	9.71

Rs. Cr (Debt)	FII Inv 10-Nov	MF Inv 7-Nov
Buy	385	11,895
Sell	491	15,337
Net	-106	-3,442
Net (MTD)	-1,852	-11,539
Net (YTD)	10,575	-487,383

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

- Vikran Engineering won order worth Rs 1,641.91 crore from Carbonminus Maharashtra One Pvt.
- Swan Defence and Heavy Industries Ltd (SDHI) inked Lol with European ship owner Rederiet Stenersen AS for constructing six IMO Type II chemical tankers in a deal worth some \$220 million.
- Total Environment Resorts raised Rs 175 crore from Standard Chartered Bank through listed, rated non-convertible debentures (NCDs).



Global market indices	11-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47927.96	1.18	5.38	14.11	8.21
Nikkei 225	50842.93	-0.14	5.73	42.75	28.61
FTSE	9899.6	1.15	5.01	15.34	21.84
Hang Seng	26696.41	0.18	1.54	15.47	30.69
Taiwan	27784.95	-0.30	2.11	34.25	18.08

Global debt	11-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	NA	4.13	4.05	4.27	4.23	4.30
UK 10-Year (%)	4.38	4.46	4.67	4.56	4.68	4.42
German 10-Year (%)	2.66	2.67	2.63	2.70	2.73	2.32
Japan 10-Year (%)	1.69	1.70	1.69	4.56	1.49	0.99

Domestic	11-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	124149	1.39	2.16	39.24	61.57
Silver (Rs / Kg)	154760	2.06	-5.92	53.39	70.33
Aluminium (Rs / Kg)	274	-0.45	2.87	9.22	13.29
Copper (Rs / kg)	1009	0.00	0.35	12.27	21.65
Lead (Rs / kg)	184	-0.65	-0.35	-1.47	-2.65
Zinc (Rs / Kg)	313	-0.16	5.35	14.05	10.21
Nickel (Rs / kg)	1338	-0.06	-1.36	-5.46	-2.21

Global	11-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4114.13	2.82	3.23	32.67	53.23
Silver (oz/\$)	5034.00	4.22	0.32	47.54	60.78
Brent (\$/bbl)	65.16	1.72	3.87	-12.85	-9.29
NYMEX crude (\$/bbl)	61.04	1.51	3.63	-14.61	-10.29

Upcoming market indicators

Date	Indicator	Previous
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%
Nov 18	US Export Prices, Sep	3.4%

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 mixed on Tuesday with Dow Jones ending higher on optimism over a potential resolution to the prolonged US government shutdown while Nasdaq declined on renewed concerns over high valuations leading to a sell off in AI related stocks.
- FTSE index closed higher on Tuesday driven by expectations of Bank of England rate cuts after soft labour data.
- Asian markets were trading mostly lower at 8.30 AM.
- US NFIB Small Business Optimism Index fell to 98.2 in October 2025, compared to 98.8 in September 2025.
- Eurozone ZEW Indicator of Economic Sentiment rose by 2.3 from the prior month to 25 in November 2025 compared to 22.7 in October 2025.
- UK unemployment rate increased to 5.0% in September quarter of 2025, the highest level since the three months to May 2021 and 4.8% in previous quarter.
- UK retail sales rose 1.5% year-on-year on a like-for-like basis in October 2025, easing from 2% in September.
- Japan's service sector index rose to 49.1 in October 2025 from 47.1 in September, marking the highest level since March 2024 and the sixth consecutive monthly increase.

Commodity

- Crude oil prices rose by 91 cents to \$61.04 a barrel on the NYMEX supported by new US sanctions on Russian oil and optimism over a possible end to the US government shutdown.
- Domestic gold prices rose due to on the hopes of US Federal Reserve rate cut expectations, and China's gold buying.

Forthcoming results

NA	NA

	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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