

Daily Market Monitor

November 17, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	14-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25910	0.12	3.04	10.16	10.10
BSE Sensex	84563	0.10	3.09	9.23	9.00
BSE 100	27134	0.03	3.02	10.40	9.28
BSE 200	11744	0.05	3.05	10.76	8.71
BSE 500	37369	0.04	2.71	11.29	8.00
BSE SmallCap	53131	0.06	0.93	13.92	1.43
BSE MidCap	47187	-0.03	2.73	13.62	6.54
BSE LargeCap	9964	0.03	2.90	10.30	9.03
Sectoral indices					
BSE IT	35414	-1.16	2.60	-1.96	-15.84
BSE Oil & Gas	28870	-0.53	6.79	14.87	10.19
BSE FMCG	20427	0.54	2.33	5.03	-0.15
BSE Auto	60721	-0.55	2.14	27.29	17.33
BSE Bankex	65649	0.31	3.03	10.26	14.62
BSE Teck	17956	-0.74	4.57	3.49	-6.08
BSE Capital Goods	70775	0.16	3.34	12.84	7.19
BSE Consumer Durable	62294	0.36	6.42	14.55	3.63

Turnover (Rs Cr)	14-Nov	13-Nov
BSE Cash	8843	9916
NSE Cash	112397	110638
NSE F&O	24845069	12045388

Rs. Cr (Equity)	FII Inv 13-Nov	MF Inv 11-Nov	DII Inv 14-Nov
Buy	17,533	10,393	23,822
Sell	15,480	9,739	15,663
Net	2,053	654	8,159
Net (MTD)	1,495	16,338	39,046
Net (YTD)	-143,490	439,030	647,652

	14-Nov	1Day	Month ago	Year ago
USD	88.74	88.72	88.79	84.40
GBP	116.72	116.39	118.08	106.83
Euro	103.32	102.76	102.80	88.80
100 Yen	57.44	57.26	58.50	54.07

Indian markets

- Indian equity benchmarks closed marginally higher on Friday, driven by gains in banking and pharma stocks following strong and decisive state election results.
- The top gainers were Eternal, Bharat Electronics, Trent, SBI and Jio Financial, up 1.35-2.02%.
- The top losers were Infosys, Eicher Motors, TMPV, JSW Steel and Tata Steel, down 1.35-2.53%.

Indian debt

- The interbank call-money rate ended higher at 5.45% on Friday compared to 5.30% on Thursday.
- Government bond prices fell on Friday due to the increase in supply and RBI-linked buying slowed.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.53% on Friday compared to 6.52% on Thursday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday owing to caution surrounding the US-India trade deal and foreign fund outflows.

Regulatory

- The Reserve Bank of India data showed Banks' annual credit growth at the end of October 31 stood at 11.3% while deposits grew 9.7%.
- The Reserve Bank of India announced a host of relief measures for exporters, which included easing the burden on debt repayments for some impacted sectors and relaxation in the repayment of export credit amid trade tensions with the United States that has imposed 50% tariffs on Indian exports.
- The Reserve Bank of India is stepping up to assist exporters with a key moratorium on loan repayments, designed to give businesses the flexibility they need to adapt to the shifting tides of global commerce and pursue fresh avenues for growth.
- Deputy Governor Shirish Chandra Murmu said the Reserve Bank of India (RBI) has an economic capital that's 25% of its balance sheet and puts it in a "formidable position" to fulfill its public policy mandates while ensuring monetary and financial stability.

Economy and Government

- India wholesale price inflation (WPI) fell to -1.21% in October from 0.13% in September and 2.75% in October last year.
- The RBI said India's foreign exchange reserves dropped by another USD 2.699 billion to USD 687.034 billion during the week ended November 7.
- Education Minister Dharmendra Pradhan inaugurated a first-of-its-kind artificial intelligence (AI) innovation and incubation centre in DPS RK Puram to integrate AI, cloud computing and applied research into school education.

Domestic Debt Market Indicators

Instrument	14-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.45%	5.30%	5.40%	5.10%	7.00%	6.25%
3-Month T-Bill	5.40%	5.41%	5.43%	5.46%	6.34%	6.44%
6-Month T-Bill	5.55%	5.54%	5.52%	5.53%	6.47%	6.61%
1-year T-Bill	5.52%	5.53%	5.55%	5.54%	6.40%	6.58%
3-Month CD	5.97%	5.95%	5.93%	5.81%	7.00%	7.14%
6-Month CD	6.22%	6.22%	6.18%	6.09%	7.25%	7.40%
1-year CD	6.39%	6.39%	6.38%	6.29%	7.15%	7.54%
3-Month CP	6.53%	6.55%	6.49%	6.28%	7.25%	7.46%
6-Month CP	6.68%	6.68%	6.71%	6.38%	7.55%	7.73%
1-year CP	6.85%	6.85%	6.90%	6.80%	7.45%	7.79%
1-year Gilt	5.57%	5.59%	5.59%	5.59%	6.40%	6.73%
3-year Gilt	5.92%	5.90%	5.90%	5.96%	6.44%	6.74%
5-year Gilt	6.18%	6.17%	6.13%	6.25%	6.45%	6.81%
1-year AAA	6.63%	6.60%	6.63%	6.57%	7.29%	7.59%
3-year AAA	6.76%	6.75%	6.86%	6.75%	7.11%	7.35%
5-year AAA	6.83%	6.82%	6.90%	6.79%	7.11%	7.30%
10-year G-sec	6.53%	6.51%	6.51%	6.40%	6.58%	6.83%
Net LAF (Rs Cr)	240251	210486	127618	303341	-9354	181380
Forex reserves (\$ bn)	687.03	689.73	699.96	688.87	642.49	682.13

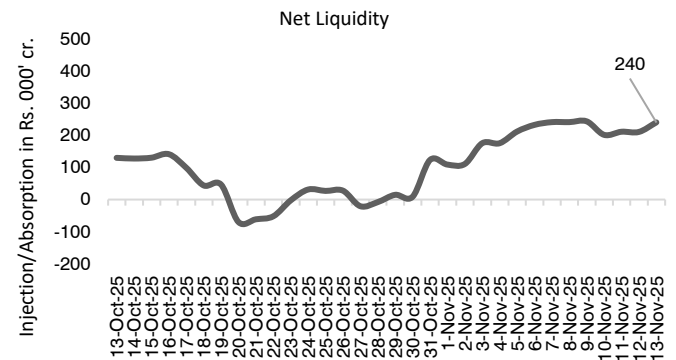
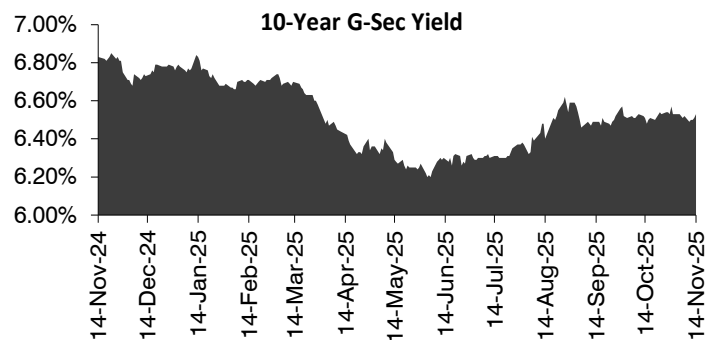
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.47	7.18	7.22	8.45	8.98
1 Year	5.57	6.63	7.34	7.38	8.61	9.14
3 Year	5.92	6.76	7.47	7.51	8.74	9.27
5 Year	6.18	6.83	7.64	7.67	8.91	9.44
10 Year	6.53	7.11	7.92	7.95	9.19	9.72

Rs. Cr (Debt)	FII Inv 13-Nov	MF Inv 11-Nov
Buy	101	19,555
Sell	679	22,905
Net	-577	-3,349
Net (MTD)	-2,199	-19,903
Net (YTD)	10,228	-495,747

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
WPI	-1.21% (Oct-25)	-0.58% (Jul-25)	2.36% (Oct-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

- Adani Group plans to invest about 630 billion rupees (\$7.17 billion) in two major energy projects in the north-eastern state of Assam.
- Adani Group plans to invest around Rs 1 trillion in various sectors of Andhra Pradesh over the next ten years.
- Bharat Dynamics won a major Rs 2,095.7 crore defence order for Invar anti-tank missiles, boosting investor sentiment.
- Bondada Engineering Ltd. bagged orders worth Rs 465 crore from the Maharashtra State Power Generation Company.
- Jio Leasing Services Ltd invested Rs 45 crore in Reliance International Leasing IFSC Pvt Ltd through a rights issue.
- Reliance Industries announced a major new wave of investment in Andhra Pradesh by signing a deal with the state government to establish a 1 GW artificial intelligence (AI) data centre.



Global market indices	14-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47147.48	-0.65	1.90	12.25	7.76
Nikkei 225	50376.53	-1.77	7.53	41.44	30.73
FTSE	9698.37	-1.11	2.60	13.00	20.16
Hang Seng	26572.46	-1.85	4.45	14.93	36.72
Taiwan	27397.5	-1.81	2.26	32.38	20.61

Global debt	14-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.14	4.11	4.03	4.29	4.23	4.43
UK 10-Year (%)	4.58	4.44	4.57	4.64	4.68	4.48
German 10-Year (%)	2.72	2.69	2.61	2.71	2.73	2.34
Japan 10-Year (%)	1.70	1.69	1.66	1.55	1.49	1.05

Domestic	14-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	124794	-1.39	-1.08	39.96	69.24
Silver (Rs / Kg)	159367	-2.07	-10.52	57.96	82.96
Aluminium (Rs / Kg)	273	-0.49	3.36	8.57	16.45
Copper (Rs / kg)	1010	-0.59	0.60	12.43	28.56
Lead (Rs / kg)	186	0.05	0.73	-0.40	2.12
Zinc (Rs /Kg)	312	-1.25	5.76	13.81	13.28
Nickel (Rs / kg)	1326	-0.87	-1.83	-6.30	-1.10

Global	14-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4190.51	-0.39	1.90	35.13	63.12
Silver (oz/\$)	5322.00	-0.49	2.66	55.98	74.38
Brent (\$/bbl)	64.29	2.03	3.05	-14.02	-11.40
NYMEX crude (\$/bbl)	59.95	2.15	2.13	-16.13	-12.74

Global markets

- Wall Street stocks closed mixed on Friday as Nasdaq gained ahead of Nvidia's quarterly results while Dow Jones declined on worries that the Fed may delay a December rate cut.
- 10-year US bond yield ended higher at 4.14% as investors weighed the interest rate outlook for the Federal Reserve.
- FTSE index closed lower on Friday following reports that the government scrapped plans to raise income tax in the upcoming budget.
- Asian markets were trading mostly lower at 8.30 AM.
- The Eurozone economy expanded 1.4% in the third quarter of 2025 compared to 1.5% in the second quarter.
- The Eurozone trade surplus widened to €19.4 billion in September 2025 compared to €12.9 billion a year earlier, as exports rose 7.7% while imports increased 5.3%.
- The Japanese economy contracted 1.8% on an annualized basis in Q3 2025, compared to an upwardly revised 2.3% growth in Q2.

Commodity

- Crude oil prices rose by \$1.26 to \$59.95 a barrel on the NYMEX due to supply concerns amid escalated tensions between Russia-Ukraine.
- Domestic gold prices fell due to profit booking.

Forthcoming results

14-Nov	Max Healthcare Institute Limited
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Upcoming market indicators

Date	Indicator	Previous
Nov 17	India Unemployment Rate, Oct	5.2%
Nov 18	US Export Prices, Sep	3.4%
Nov 19	Eurozone Inflation Rate Final, Oct	2.2%
Nov 20	US Kansas Fed Manufacturing Index, Nov	15
Nov 21	Japan Inflation Rate, Oct	2.9%

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

	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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