

Daily Market Monitor

February 05, 2026

Domestic Market Performance

Indian market indices	4-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25776	0.19	-2.10	9.59	8.58
BSE Sensex	83818	0.09	-2.27	8.27	6.66
BSE 100	27003	0.24	-2.08	9.87	8.51
BSE 200	11667	0.32	-2.16	10.03	8.51
BSE 500	36890	0.37	-2.41	9.86	7.87
BSE SmallCap	49621	0.95	-4.43	6.40	-0.36
BSE MidCap	46117	0.60	-2.99	11.04	7.06
BSE LargeCap	9923	0.28	-1.94	9.85	8.70
Sectoral indices					
BSE IT	35110	-5.49	-5.46	-2.80	-16.78
BSE Oil & Gas	29024	2.37	0.39	15.48	16.34
BSE FMCG	18713	0.36	-4.14	-3.78	-9.99
BSE Auto	61733	1.22	-3.25	29.41	16.77
BSE Bankex	67700	0.41	0.32	13.70	18.65
BSE Teck	17799	-3.71	-4.84	2.59	-7.94
BSE Capital Goods	68206	0.17	0.49	8.74	10.10
BSE Consumer Durable	57977	2.36	-4.14	6.61	-3.82

Turnover (Rs Cr)	4-Feb	3-Feb
BSE Cash	10435	11841
NSE Cash	135527	174056
NSE F&O	10442224	70858735

Rs. Cr (Equity)	FII Inv 3-Feb	MF Inv 1-Feb	DII Inv 4-Feb
Buy	29,485	10,800	18,632
Sell	21,923	11,841	18,382
Net	7,561	-1,041	250
Net (MTD)	8,350	-1,041	3,027
Net (YTD)	-25,348	41,314	65,357

	4-Feb	1Day	Month ago	Year ago
USD	90.47	90.45	90.12	87.12
GBP	124.11	123.89	121.35	108.01
Euro	107.06	106.86	105.84	89.70
100 Yen	57.89	58.19	57.42	56.11

Indian markets

- Indian equity benchmark indices closed marginally higher on Wednesday on account of the India-US trade agreement, despite a global selloff in shares of software companies driven by concerns over artificial intelligence-induced disruption.
- The top gainers were Trent, Eternal, ONGC, NTPC and Adani Ports, which were up 2.25-5.18%.
- The top losers were Infosys, TCS, HCL Technology, Tech Mahindra and Wipro, down 3.79-7.37%.

Indian debt

- The interbank call-money rate ended higher at 5.10% on Wednesday compared to 4.40% on Tuesday.
- Government bond prices rose on Wednesday supported by expectations of continued RBI bond purchases ahead of record borrowing next fiscal year.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.70% on Wednesday compared to 6.73% on Tuesday.

Indian Rupee

- The rupee ended marginally lower against the US dollar on Wednesday, as demand for the greenback for hedging by corporates offset optimism after the recent India-US trade deal..

Regulatory

- Sebi proposed a comprehensive overhaul of the 'fit and proper person' framework governing market intermediaries, aiming to bring greater procedural clarity and fairness to the regulatory process.
- Sebi Chairman Tuhin Kanta Pandey said that end of trade frictions through trade deals like the one with the US removes uncertainties, which will help accelerate capital formation

Economy and Government

- India HSBC Services PMI rose to 58.5 in January 2026 compared to 58.0 in December 2025 while the HSBC Composite PMI edged up to 58.4 from 57.8.
- Commerce and Industry Minister Piyush Goyal said India's core sensitivities in food and agriculture have been fully safeguarded in the trade deal with the United States (US).
- The Unique Identification Authority of India (UIDAI) has so far deactivated more than 25 million Aadhaar numbers belonging to deceased people to prevent fraud.

Domestic Debt Market Indicators

Instrument	4-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.10%	4.40%	5.35%	4.95%	7.00%	6.50%
3-Month T-Bill	5.36%	5.39%	5.24%	5.46%	6.34%	6.50%
6-Month T-Bill	5.58%	5.61%	5.42%	5.55%	6.47%	6.58%
1-year T-Bill	5.62%	5.65%	5.51%	5.56%	6.40%	6.57%
3-Month CD	6.98%	7.00%	6.23%	6.00%	7.00%	7.46%
6-Month CD	7.02%	7.10%	6.50%	6.24%	7.25%	7.62%
1-year CD	6.93%	6.94%	6.70%	6.44%	7.15%	7.58%
3-Month CP	7.60%	7.60%	6.65%	6.52%	7.25%	7.84%
6-Month CP	7.65%	7.70%	6.95%	6.77%	7.55%	7.95%
1-year CP	7.55%	7.55%	7.05%	6.94%	7.45%	7.83%
1-year Gilt	5.65%	5.68%	5.67%	5.62%	6.40%	6.55%
3-year Gilt	5.98%	5.99%	5.87%	5.91%	6.44%	6.59%
5-year Gilt	6.47%	6.50%	6.34%	6.16%	6.45%	6.64%
1-year AAA	7.10%	7.14%	6.86%	6.66%	7.29%	7.49%
3-year AAA	7.16%	7.26%	6.89%	6.85%	7.11%	7.37%
5-year AAA	7.25%	7.30%	7.16%	6.89%	7.11%	7.20%
10-year G-sec	6.70%	6.73%	6.61%	6.53%	6.58%	6.67%
Net LAF (Rs Cr)	216562	170591	61447	175304	-9354	-38216
Forex reserves (\$ bn)	709.41	701.36	696.61	695.36	642.49	629.56

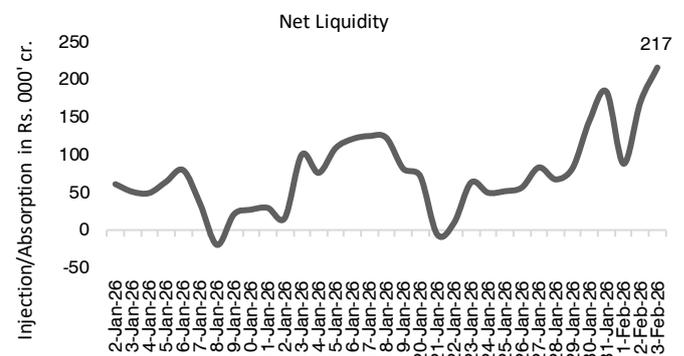
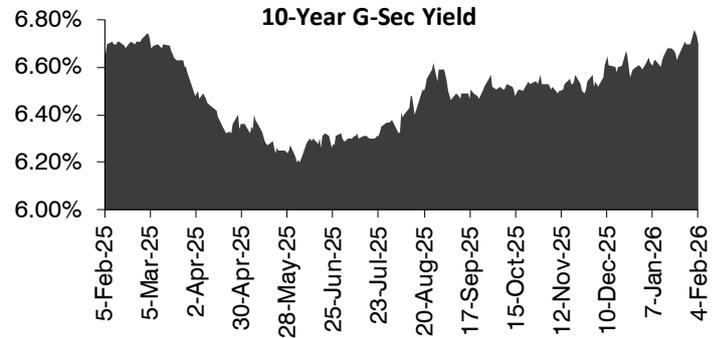
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.58	7.28	8.02	8.07	9.30	9.78
1 Year	5.65	7.10	7.84	7.89	9.12	9.60
3 Year	5.98	7.16	7.90	7.95	9.18	9.66
5 Year	6.47	7.25	8.09	8.14	9.37	9.85
10 Year	6.70	7.41	8.25	8.30	9.53	10.01

Rs. Cr (Debt)	FII Inv 3-Feb	MF Inv 1-Feb
Buy	486	21
Sell	968	18
Net	-482	3
Net (MTD)	-405	3
Net (YTD)	-6,682	-90,804

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	1.33% (Dec-25)	1.44% (Sep'25)	5.22% (Dec'24)
WPI	0.83% (Dec-25)	0.13% (Sep-25)	2.37% (Dec-24)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
India Manufacturing PMI	55.0 (Dec-25)	57.7 (Sep-25)	56.4 (Dec-24)
India Service PMI	58.0 (Dec-25)	60.9 (Sep-25)	59.3 (Dec-24)
Bank Credit Growth*	-1.45% (Jan 15, 2026)		3.02% (Dec 31, 2025)
Bank Deposit Growth*	-0.94% (Jan 15, 2026)		3.91% (Dec 31, 2025)

Capital markets

- BHEL secured an order in the range of Rs 1,200-1,500 crore from Hindalco Industries.
- Marico plans to acquire a 60% stake in plant-based nutrition brand Cosmix, valuing the startup at Rs 375 crore.



Global market indices	4-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49501.3	0.53	2.31	17.86	11.10
Nikkei 225	54293.36	-0.78	7.85	52.43	39.94
FTSE	10402.34	0.85	4.53	21.20	21.37
Hang Seng	26847.32	0.05	1.93	16.12	29.14
Taiwan	32289.81	0.29	10.02	56.02	41.66

Global debt	4-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.28	4.19	4.10	4.23	4.52
UK 10-Year (%)	4.56	4.52	4.54	4.42	4.68	4.52
German 10-Year (%)	2.86	2.89	2.90	2.65	2.73	2.39
Japan 10-Year (%)	2.25	2.26	2.07	1.67	1.49	1.27

Domestic	4-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	156625	3.36	16.21	75.66	88.68
Silver (Rs / Kg)	282462	7.01	20.43	179.96	201.15
Aluminium (Rs / Kg)	316	0.64	5.12	26.02	24.60
Copper (Rs / kg)	1260	0.56	5.24	40.26	51.08
Lead (Rs / kg)	199	2.21	3.40	6.73	6.70
Zinc (Rs /Kg)	329	0.17	5.11	20.01	21.47
Nickel (Rs / kg)	1614	0.99	4.48	14.06	21.30

Global	4-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4908.43	5.92	13.48	58.28	74.13
Silver (oz/\$)	8319.00	7.80	16.40	143.82	163.26
Brent (\$/bbl)	69.46	3.16	14.34	-7.10	-8.85
NYMEX crude (\$/bbl)	65.14	3.05	13.64	-8.87	-10.40

Global markets

- Wall Street stocks closed mixed on Wednesday with Dow Jones edging up due to gains in industrials stocks while Nasdaq declined, dragged down by losses in technology and software stocks amid concerns about lofty valuations and the sustainability of AI-driven growth.
- 10-year US bond yield ended higher at 4.29% amid better-than-expected economic data.
- FTSE index closed higher on Wednesday boosted by gains in healthcare sector after strong earnings ahead of the Bank of England's policy decision.
- Asian markets were trading mostly lower at 8.30 AM.
- US Private businesses in the US added 22,000 jobs in January 2026, following a downwardly revised 37,000 rise in December.
- US ISM services PMI steadied at 53.8 in January 2026, the same as a downwardly revised 53.8 in December.
- US S&P Global Services PMI rose to 52.7 in January of 2026 from 52.5 in the previous month while Composite PMI rose to 53.0 from 52.7.
- Eurozone Services PMI decreased to 51.6 in January 2026 compared to 52.4 in December 2025 while the HCOB Composite PMI inched lower to 51.3 from 51.5.
- Eurozone annual inflation eased to 1.7% in January 2026, compared to 2.0% in December 2025 while the annual core inflation rate fell to 2.2% in January of 2026 from 2.3%.
- Eurozone producer prices decreased 2.1% year-over-year in December 2025 compared to a 1.4% fall in November 2025.
- UK S&P Global Services PMI rose to 54 in January 2026 compared to 51.4 in December 2025 while the S&P Global Composite PMI increased to 53.7 from 51.4.

Commodity

- Crude oil prices rose by \$1.93 to \$65.14a barrel on the NYMEX as reports that planned US-Iran talks could collapse raised fears of supply disruptions.
- Domestic gold prices rose due to safe haven appeal amid rising geopolitical tensions.

Forthcoming results

Date	Indicator	Previous
Feb 4	Eurozone PPI, Dec	-1.7%
Feb 5	US Initial Jobless Claims Jan/31	209K
Feb 6	India Foreign Exchange Reserves Jan/30	\$709.41B
Feb 7	China Foreign Exchange Reserves Jan	\$3.358T
Feb 11	China PPI, Jan	-1.9%

NA	NA
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Upcoming market indicators

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Feb 11	China PPI, Jan	-1.9%

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 -MEX, 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	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25
Debt Indicators	Currency in circulation (Rs billion)	39079	38512	38184	38071	38097	38147	38372	38344	37762	36997
	Repo rate	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%
	10-year G-sec yield	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%
	Call rate	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%
	Forex reserves (\$ billion; mthly. avg.)	692	688	699	701	693	698	699	689	682	656
GDP	GDP	NA	NA	7.80%				7.40%		6.40%	
	Fiscal deficit (Rs billion)	NA	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18
	IIP, %y/y	NA	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%
	Exports, \$ billion	NA	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49	41.97
	Imports, \$ billion	NA	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91	63.51
	Manufacturing PMI	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1
	Services PMI	59.1	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5
	GST collections (Rs crore)	174550	170276	195936	189017	186315	195735	184597	201050	236716	196141
	India crude oil import (mbpd)	NA	21.06	21.01	20.21	19.60	18.89	20.32	21.3	21.0	22.7
Sector update	Auto – Passenger vehicles	NA	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%
	Auto – Two-wheelers	NA	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%
	Auto – Commercial vehicles	NA	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%
	Auto – Tractors	NA	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%
	Infra – Coal	NA	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%	1.6%
	Infra – Electricity	NA	-2.2%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%
	Infra – Steel	NA	6.10%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%	8.7%
	Infra – Cement	NA	14.50%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%	12.2%

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