

Daily Market Monitor

February 06, 2026

Domestic Market Performance

Indian market indices	5-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25643	-0.52	-2.31	9.03	8.21
BSE Sensex	83314	-0.60	-2.49	7.62	6.44
BSE 100	26870	-0.49	-2.28	9.33	8.07
BSE 200	11614	-0.45	-2.37	9.53	7.99
BSE 500	36695	-0.53	-2.75	9.28	7.09
BSE SmallCap	49103	-1.04	-5.49	5.29	-2.78
BSE MidCap	45926	-0.41	-3.44	10.58	5.88
BSE LargeCap	9875	-0.49	-2.15	9.31	8.26
Sectoral indices					
BSE IT	34843	-0.76	-4.88	-3.54	-17.53
BSE Oil & Gas	29041	0.06	1.65	15.55	14.25
BSE FMCG	18622	-0.48	-5.08	-4.24	-9.13
BSE Auto	61346	-0.63	-4.15	28.60	16.20
BSE Bankex	67536	-0.24	0.09	13.43	18.39
BSE Teck	17637	-0.91	-4.60	1.66	-8.79
BSE Capital Goods	67479	-1.07	-0.75	7.58	8.75
BSE Consumer Durable	57468	-0.88	-6.16	5.68	-3.49

Turnover (Rs Cr)	5-Feb	4-Feb
BSE Cash	8582	10435
NSE Cash	114316	135527
NSE F&O	9481324	10442224

Rs. Cr (Equity)	FII Inv 4-Feb	MF Inv 1-Feb	DII Inv 5-Feb
Buy	20,472	10,800	15,182
Sell	19,380	11,841	14,052
Net	1,092	-1,041	1,130
Net (MTD)	9,442	-1,041	4,157
Net (YTD)	-24,256	41,314	66,487

	5-Feb	1Day	Month ago	Year ago
USD	90.40	90.47	90.27	87.22
GBP	123.03	124.11	121.28	108.87
Euro	106.55	107.06	105.52	90.60
100 Yen	57.60	57.89	57.48	56.94

Indian markets

- Indian equity benchmarks closed lower on Thursday because of higher profit booking.
- The top gainers were Trent, Max Healthcare Institute, Tata Steel, JSW Steel and Grasim Industries, up 0.92- 2.98%.
- The top losers were Hindalco Industries, ETERNAL, Bharti Airtel, Bharat Electronics and ITC, down 1.19- 3.00%.

Indian debt

- The interbank call-money rate ended lower at 5.05% on Thursday compared to 5.10% on Wednesday.
- Government bond prices rose on Wednesday as the RBI accepted bond purchase bids at higher-than-expected prices.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.65% on Thursday compared to 6.70% on Wednesday.

Indian Rupee

- The rupee closed higher against the dollar on Thursday, supported by dollar sales from foreign banks and short covering.

Regulatory

- The Securities and Exchange Board of India (Sebi) proposed easing norms governing the winding up of alternative investment fund (AIF) schemes and the surrender of registrations, including allowing funds to retain a portion of liquidation proceeds beyond their permissible fund life under specified conditions.
- The Securities and Exchange Board of India (Sebi) proposed easing key stress-testing and settlement guarantee fund (SGF) norms for clearing corporations in the commodity derivatives segment, to align risk management with global standards and improve ease of doing business.

Economy and Government

- PM Modi said that India's recent trade agreements have placed the country firmly at the centre of global economic attention, with major economies lining up to deepen commercial ties with New Delhi.
- Commerce and Industry Minister Piyush Goyal said India and the United States plan to sign the first tranche of a formal, legal trade agreement by mid-March.
- India and the six-nation bloc of Middle Eastern nations, the Gulf Cooperation Council (GCC), inked terms of reference for starting talks for a Free Trade Agreement (FTA).
- The Centre has notified the Offshore Areas Mineral (Prevention of Illegal Mining and Transportation) Rules, 2026 in a bid to tighten oversight of the mining, storage, transportation and export of minerals extracted from India's offshore areas.
- The government imposed a minimum import price of Rs 100 per piece on umbrellas, a move which would help boost domestic manufacturing of the product..

Domestic Debt Market Indicators

Instrument	5-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.05%	5.10%	5.40%	4.95%	7.00%	5.75%
3-Month T-Bill	5.33%	5.36%	5.29%	5.46%	6.34%	6.42%
6-Month T-Bill	5.54%	5.58%	5.45%	5.55%	6.47%	6.55%
1-year T-Bill	5.59%	5.62%	5.50%	5.56%	6.40%	6.50%
3-Month CD	6.98%	6.98%	6.36%	6.00%	7.00%	7.41%
6-Month CD	7.02%	7.02%	6.62%	6.24%	7.25%	7.58%
1-year CD	6.93%	6.93%	6.75%	6.44%	7.15%	7.57%
3-Month CP	7.60%	7.60%	6.73%	6.52%	7.25%	7.75%
6-Month CP	7.65%	7.65%	7.00%	6.77%	7.55%	7.90%
1-year CP	7.55%	7.55%	7.10%	6.94%	7.45%	7.86%
1-year Gilt	5.67%	5.65%	5.65%	5.62%	6.40%	6.56%
3-year Gilt	5.96%	5.98%	5.91%	5.91%	6.44%	6.57%
5-year Gilt	6.45%	6.47%	6.37%	6.16%	6.45%	6.63%
1-year AAA	7.15%	7.10%	6.90%	6.66%	7.29%	7.46%
3-year AAA	7.15%	7.16%	6.93%	6.85%	7.11%	7.30%
5-year AAA	7.21%	7.25%	7.20%	6.89%	7.11%	7.20%
10-year G-sec	6.66%	6.70%	6.64%	6.53%	6.58%	6.66%
Net LAF (Rs Cr)	195988	216562	64812	175304	-9354	-45006
Forex reserves (\$ bn)	709.41	701.36	696.61	695.36	642.49	629.56

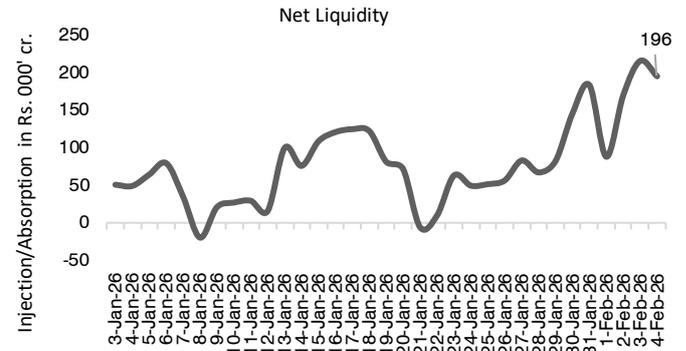
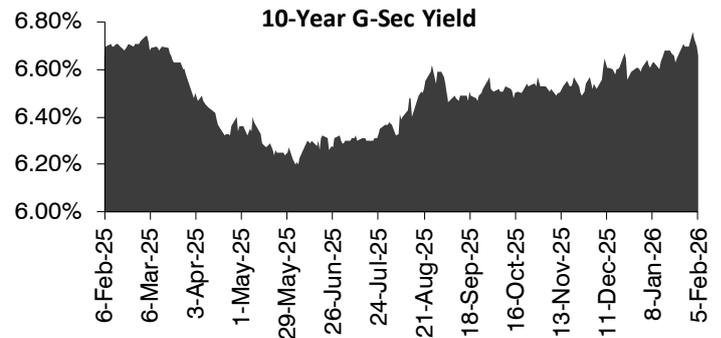
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	7.33	8.07	8.12	9.35	9.83
1 Year	5.67	7.15	7.89	7.94	9.17	9.65
3 Year	5.96	7.15	7.89	7.94	9.17	9.65
5 Year	6.45	7.21	8.05	8.10	9.33	9.81
10 Year	6.66	7.37	8.21	8.26	9.49	9.97

Rs. Cr (Debt)	FII Inv 4-Feb	MF Inv 1-Feb
Buy	303	21
Sell	153	18
Net	150	3
Net (MTD)	-255	3
Net (YTD)	-6,532	-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

- Apogee Aerospace signed an order for 15 amphibian aircraft with Australia's Amphibian Aerospace Industries (AAI) for a total value of Rs 3,500 crore as part of a strategic collaboration.
- Sun Pharmaceutical plans to invest Rs 500 crore to set up a manufacturing plant in Assam, generating direct employment for over 500 people.
- ArcelorMittal Nippon Steel India (AM/NS India) received green steel certification under the Ministry of Steel's new green steel taxonomy.
- State Bank of India (SBI) raised \$1 billion (about Rs 9,100 crore) through a five-year loan from Mitsubishi UFG Financial Group (MUFG).



Global market indices	5-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	48908.72	-1.20	-0.14	16.44	8.99
Nikkei 225	53818.04	-0.88	3.83	51.10	38.59
FTSE	10309.22	-0.90	3.05	20.11	19.55
Hang Seng	26885.24	0.14	2.04	16.29	30.53
Taiwan	31801.27	-1.51	5.63	53.66	37.30

Global debt	5-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.21	4.29	4.17	4.10	4.23	4.43
UK 10-Year (%)	4.57	4.56	4.51	4.42	4.68	4.44
German 10-Year (%)	2.84	2.86	2.87	2.65	2.73	2.36
Japan 10-Year (%)	2.22	2.25	2.11	1.67	1.49	1.27

Domestic	5-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	152502	-2.63	12.00	71.04	80.14
Silver (Rs / Kg)	254339	-9.96	7.29	152.09	166.53
Aluminium (Rs / Kg)	308	-2.53	0.98	22.83	21.19
Copper (Rs / kg)	1223	-2.94	0.37	36.15	46.43
Lead (Rs / kg)	196	-1.51	4.53	5.12	6.11
Zinc (Rs /Kg)	323	-1.96	3.21	17.66	19.89
Nickel (Rs / kg)	1581	-2.06	2.72	11.72	17.72

Global	5-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4924.87	0.33	13.68	58.81	73.24
Silver (oz/\$)	8470.00	1.82	16.31	148.24	162.07
Brent (\$/bbl)	67.55	-2.75	9.38	-9.66	-9.46
NYMEX crude (\$/bbl)	63.29	-2.84	8.52	-11.46	-10.90

Global markets

- Wall Street stocks closed ended lower on Thursday due to weak technology earnings, a bitcoin drop, and disappointing job reports.
- 10-year US bond yield ended lower at 4.21% amid weak labor market data
- FTSE index declined on Thursday after interest rate cuts following dovish comments from the Bank of England and political uncertainty.
- Asian markets were trading mostly mixed at 8.30 AM.
- United States Initial Jobless Claims rose to 231,000 on the last week of January.
- US Job openings fell to 6.542 million in December 2025, compared to 6.928 million in previous month.
- The European Central Bank left its key interest Rate unchanged at 2.15% in its February 5th, 2026 decision while the marginal lending facility rate steady at 2.4% and its deposit facility rate unchanged at 2%.
- Eurozone retail sales rose by 1.3% year over year in December 2025, compared to a revised 2.4% increase in November 2025.
- Eurozone HCOB Construction PMI fell to 45.3 in January 2026 compared to 47.4 in December 2025.
- The Bank of England kept its Bank Rate unchanged at 3.75% in February, with a narrow 5 to 4 vote, as policymakers balanced easing inflation pressures against risks from a weakening economy.
- UK S&P Global Construction PMI rose to 46.4 in January 2026, compared to 40.1 in December 2025.
- Japan Household Spending declined 2.6% in December 2025, compared to 2.9% drop in the previous month.
- Japan's foreign reserves rose to \$1.39 trillion in January 2026, compared to \$13.69 trillion in the previous month.

Commodity

- Crude oil prices declined by \$1.85 to \$63.29 a barrel on the NYMEX after the US and Iran agreed to hold talks in Oman on Friday, easing concerns about Iranian crude supplies.
- Domestic gold prices rose due to safe haven appeal amid rising geopolitical tensions.

Forthcoming results

Date	Indicator	Previous
NA	NA	NA

Upcoming market indicators

Date	Indicator	Previous
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%
Feb 12	Japan PPI, Jan	2.4%

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

Indicators		Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25
Debt Indicators	Currency in circulation (Rs billion)	39800	39079	38551	38184	38071	38097	38147	38372	38344	37762
	Repo rate	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%
	10-year G-sec yield	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%
	Call rate	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%
	Forex reserves (\$ billion; mthly. avg.)	696	692	688	699	701	693	698	699	689	682
GDP	GDP	NA	NA	7.80%	7.80%	7.40%	7.40%	6.40%	6.40%	6.40%	6.40%
	Fiscal deficit (Rs billion)	NA	-120829	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	-1731.69	1863.32
	IIP, %y/y	NA	7.80%	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%
	Exports, \$ billion	NA	38.51	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49
	Imports, \$ billion	NA	63.55	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91
	Manufacturing PMI	55.4	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2
	Services PMI	58.5	58	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7
	GST collections (Rs crore)	193384	174550	170276	195936	189017	186315	195735	184597	201050	236716
	India crude oil import (mbpd)	NA	21.59	21.24	21.01	20.21	19.60	18.89	20.32	21.3	21.0
Sector update	Auto – Passenger vehicles	NA	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%
	Auto – Two-wheelers	NA	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%
	Auto – Commercial vehicles	NA	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%
	Auto – Tractors	NA	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%
	Infra – Coal	NA	3.60%	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%
	Infra – Electricity	NA	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%
	Infra – Steel	NA	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%
	Infra – Cement	NA	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%

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