

Daily Market Monitor

February 11, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	10-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25935	0.26	0.98	10.27	10.92
BSE Sensex	84274	0.25	0.83	8.86	9.01
BSE 100	27165	0.23	0.97	10.53	11.11
BSE 200	11760	0.24	1.20	10.90	11.33
BSE 500	37207	0.25	1.09	10.80	10.69
BSE SmallCap	50470	0.71	1.12	8.22	2.93
BSE MidCap	46723	0.13	0.90	12.50	10.82
BSE LargeCap	9995	0.26	1.27	10.64	11.35
Sectoral indices					
BSE IT	34516	0.35	-6.19	-4.45	-17.52
BSE Oil & Gas	29353	0.51	7.66	16.79	20.06
BSE FMCG	19155	0.29	-0.17	-1.50	-3.88
BSE Auto	62554	1.35	0.42	31.13	20.53
BSE Bankex	67983	-0.18	2.05	14.18	20.02
BSE Teck	17608	-0.11	-4.19	1.49	-8.56
BSE Capital Goods	68975	-0.09	5.17	9.97	14.21
BSE Consumer Durable	59197	-0.20	-3.74	8.85	2.93

Turnover (Rs Cr)	10-Feb	9-Feb
BSE Cash	9157	8366
NSE Cash	118064	114973
NSE F&O	59941274	22331952

Rs. Cr (Equity)	FII Inv 9-Feb	MF Inv 6-Feb	DII Inv 10-Feb
Buy	17,750	10,457	15,263
Sell	14,053	12,693	14,089
Net	3,698	-2,236	1,174
Net (MTD)	15,338	-4,749	4,071
Net (YTD)	-18,360	37,606	66,400

	10-Feb	1Day	Month ago	Year ago
USD	90.58	90.40	90.14	87.59
GBP	123.86	123.08	121.02	108.67
Euro	107.87	107.05	105.01	90.36
100 Yen	58.31	57.77	57.26	57.69

Indian markets

- Indian equity benchmarks closed higher on Tuesday, supported by significant gains in automobile and metals stocks.
- The top gainers were, ETERNAL, Tata Steel, Oil & Natural Gas Corporation, Mahindra & Mahindra, and Bajaj Auto, up 1.79%-5.19%.
- The top losers were, HCL Technologies, Bajaj Finance, Dr. Reddy's Laboratories, Shriram Finance, and Bharti Airtel, down 1.31%-2.03%.

Indian debt

- The interbank call-money rate ended higher at 4.45% on Tuesday compared to 4.40% on Monday.
- Government bond prices rose on Tuesday after strong demand at a state debt auction eased concerns over supply absorption.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.73% on Tuesday compared to 6.76% on Monday.

Indian Rupee

- The rupee weakened against the US dollar on Tuesday, dragged down by geopolitical uncertainties and dollar demand from importers.

Regulatory

- The Reserve Bank of India has issued new guidelines for non-banking finance companies, allowing certain NBFCs with assets under Rs 1000 crore and no direct customer interaction to apply for exemption from registration.

Economy and Government

- Union Minister of State Suresh Gopi said that the central government has approved two railway projects that will ease the rail travel woes of people of the state and ensure smoother movement of goods.

Domestic Debt Market Indicators

Instrument	10-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.45%	4.40%	5.30%	4.95%	7.00%	6.10%
3-Month T-Bill	5.33%	5.34%	5.30%	5.41%	6.34%	6.41%
6-Month T-Bill	5.55%	5.55%	5.53%	5.55%	6.47%	6.52%
1-year T-Bill	5.62%	5.65%	5.55%	5.55%	6.40%	6.50%
3-Month CD	7.00%	7.04%	6.62%	6.03%	7.00%	7.45%
6-Month CD	7.12%	7.12%	6.85%	6.23%	7.25%	7.60%
1-year CD	6.95%	6.98%	6.87%	6.39%	7.15%	7.61%
3-Month CP	7.60%	7.55%	6.95%	6.58%	7.25%	7.77%
6-Month CP	7.65%	7.62%	7.17%	6.72%	7.55%	7.90%
1-year CP	7.52%	7.47%	7.22%	6.92%	7.45%	7.87%
1-year Gilt	5.67%	5.73%	5.64%	5.58%	6.40%	6.55%
3-year Gilt	5.99%	6.00%	5.91%	5.90%	6.44%	6.63%
5-year Gilt	6.48%	6.52%	6.37%	6.15%	6.45%	6.68%
1-year AAA	7.12%	7.14%	6.98%	6.65%	7.29%	7.49%
3-year AAA	7.22%	7.24%	7.00%	6.83%	7.11%	7.33%
5-year AAA	7.28%	7.28%	7.21%	6.87%	7.11%	7.24%
10-year G-sec	6.73%	6.76%	6.63%	6.49%	6.58%	6.71%
Net LAF (Rs Cr)	311006	297221	21299	201366	-9354	-196334
Forex reserves (\$ bn)	723.77	709.41	686.80	689.73	642.49	630.61

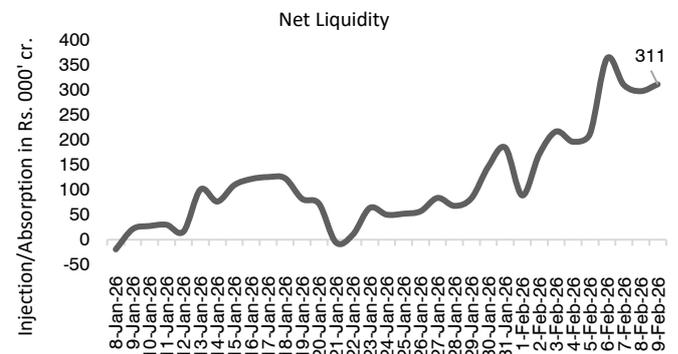
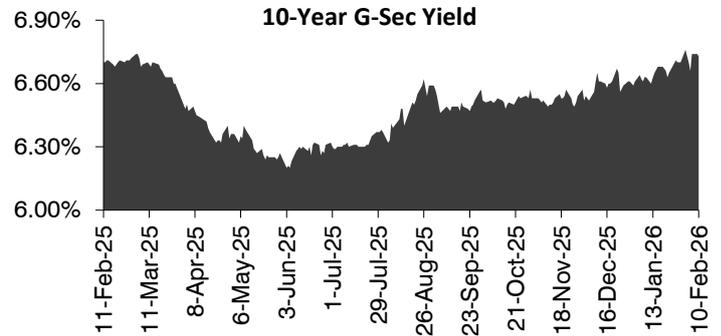
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	7.37	8.11	8.16	9.39	9.87
1 Year	5.67	7.12	7.86	7.91	9.14	9.62
3 Year	5.99	7.22	7.96	8.01	9.24	9.72
5 Year	6.48	7.28	8.12	8.17	9.40	9.88
10 Year	6.73	7.44	8.28	8.33	9.56	10.04

Rs. Cr (Debt)	FII Inv 9-Feb	MF Inv 6-Feb
Buy	611	17,611
Sell	275	26,469
Net	336	-8,858
Net (MTD)	487	-31,088
Net (YTD)	-5,791	-121,895

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

- PadCare Labs raised \$3 million in a round led by Rainmatter, cofounded by Nithin Kamath.
- Edelweiss Financial Services announced that Carlyle to invest Rs 2,100 crore to acquire a majority stake in its subsidiary, Nido Home Finance.



Global market indices	10-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50188.14	0.10	1.38	19.49	12.86
Nikkei 225	57650.54	2.28	10.99	61.86	48.58
FTSE	10353.84	-0.31	2.26	20.63	18.09
Hang Seng	27183.15	0.58	3.63	17.58	26.30
Taiwan	33072.97	2.06	9.19	59.80	42.24

Global debt	10-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.22	4.22	4.18	4.13	4.23	4.51
UK 10-Year (%)	4.51	4.53	4.38	4.46	4.68	4.46
German 10-Year (%)	2.80	2.84	2.83	2.67	2.73	2.36
Japan 10-Year (%)	2.23	2.28	2.09	1.70	1.49	1.31

Domestic	10-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	156255	0.89	13.95	75.24	82.40
Silver (Rs / Kg)	259100	2.14	6.71	156.81	171.22
Aluminium (Rs / Kg)	311	-0.37	-0.48	23.96	21.07
Copper (Rs / kg)	1237	0.08	0.16	37.70	44.42
Lead (Rs / kg)	196	0.59	2.09	4.77	4.10
Zinc (Rs /Kg)	330	0.35	5.32	20.16	20.97
Nickel (Rs / kg)	1560	-1.29	-2.62	10.22	13.03

Global	10-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5055.36	1.79	13.55	63.02	76.64
Silver (oz/\$)	8252.00	6.07	9.20	141.85	159.33
Brent (\$/bbl)	68.80	-0.35	8.62	-7.98	-9.32
NYMEX crude (\$/bbl)	63.96	-0.62	8.19	-10.52	-11.56

Global markets

- Wall Street stocks closed mixed on Tuesday with Dow Jones gaining as investors rotated into defensive and value stocks while Nasdaq declined due to losses in technology and communication services stocks after weak retail sales data.
- 10-year US bond yield ended flat at 4.22% as investors remained caution ahead of release of key 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 Retail Sales increased 2.4% in December 2025, compared to a 3.3% rise in November 2025.
- US NFIB Small Business Optimism Index fell to 99.3 in January 2026 from 99.5 in December 2025.
- US export prices increased 3.1% year-on-year in December 2025, compared to a 3.2% rise in November while import prices were flat at 0.0% after a 0.1% decrease in November.
- China annual inflation eased sharply to 0.2% in January 2026 compared to 0.8% rise in December 2025.
- China producer prices dropped 1.4% year-on-year in January 2026, compared to a 1.9% fall in December 2025.

Commodity

- Crude oil prices fell by 40 cents to \$63.96 a barrel on the NYMEX as investors awaited cues from US-Iran diplomacy, Ukraine war developments and key US economic data.
- Domestic gold prices rose due to safe haven appeal amid rising geopolitical tensions.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Feb 11	China PPI, Jan	-1.9%
Feb 12	Japan PPI, Jan	2.4%
Feb 13	India WPI Inflation, Jan	0.83%
Feb 16	Japan GDP Price Index YoY Prel Q4	3.4%
Feb 17	UK Unemployment Rate Dec	5.1%

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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