

Daily Market Monitor

February 12, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	11-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25954	0.07	1.05	10.35	12.49
BSE Sensex	84234	-0.05	0.79	8.81	10.41
BSE 100	27203	0.14	1.11	10.68	13.07
BSE 200	11777	0.14	1.34	11.06	13.46
BSE 500	37257	0.13	1.22	10.95	13.00
BSE SmallCap	50389	-0.16	0.96	8.04	6.37
BSE MidCap	46770	0.10	1.00	12.61	14.22
BSE LargeCap	10012	0.17	1.45	10.83	13.28
Sectoral indices					
BSE IT	33919	-1.73	-7.82	-6.10	-17.78
BSE Oil & Gas	29485	0.45	8.15	17.32	22.94
BSE FMCG	19148	-0.04	-0.20	-1.54	-1.84
BSE Auto	63325	1.23	1.66	32.75	25.13
BSE Bankex	68096	0.17	2.22	14.37	21.54
BSE Teck	17423	-1.05	-5.20	0.42	-8.49
BSE Capital Goods	68998	0.03	5.21	10.00	17.29
BSE Consumer Durable	59374	0.30	-3.45	9.18	5.38

Turnover (Rs Cr)	11-Feb	10-Feb
BSE Cash	9329	9157
NSE Cash	112626	118064
NSE F&O	9887711	59941274

Rs. Cr (Equity)	FII Inv 10-Feb	MF Inv 9-Feb	DII Inv 11-Feb
Buy	17,880	10,380	14,281
Sell	17,560	10,773	14,407
Net	320	-393	-125
Net (MTD)	15,658	-5,142	3,945
Net (YTD)	-18,039	37,212	66,275

	11-Feb	1Day	Month ago	Year ago
USD	90.57	90.58	90.14	86.89
GBP	123.84	123.86	121.02	107.41
Euro	107.96	107.87	105.01	89.54
100 Yen	59.21	58.31	57.26	57.20

Indian markets

- Indian equity benchmarks ended flat on Wednesday, with gains fuelled by optimism over the US-India trade deal countered by a sharp sell-off in IT stocks.
- The top gainers were Eicher Motors, Apollo Hospitals Enterprise, Max Healthcare Institute, State Bank of India and Maruti Suzuki India, up 1.89-6.45%.
- The top losers were Tata Consultancy Services, Infosys, Coal India, HCL Technologies and Tech Mahindra, down 1.19- 2.53%.

Indian debt

- The interbank call-money rate ended higher at 4.65% on Wednesday compared to 4.45% on Tuesday.
- Government bond prices rose on Wednesday as softer US economic data lifted rate cut expectations with focus now on to US non-farm payrolls and India inflation data for cues on policy outlook.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.71% on Wednesday compared to 6.73% on Tuesday.

Indian Rupee

- The spot rupee closed slightly lower against the dollar on Wednesday, on strong dollar demand amid geopolitical uncertainty.

Regulatory

- The Reserve Bank of India (RBI) issued draft amendment directions aimed at strengthening regulations governing the advertising, marketing and sale of financial products and services by regulated entities, including banks and non-banking financial companies (NBFCs).
- SEBI Chairman Tuhin Kanta Pandey expressed concerns over some small and medium enterprises (SMEs) misusing regulatory relaxations, citing instances of fund diversion and market manipulation, while emphasizing the crucial role of SME platforms in capital formation.

Economy and Government

- The government announced the launch of an Offer for Sale (OFS) in state-run Bharat Heavy Electricals Limited (BHEL) to divest up to a 3 per cent equity stake, with an additional 2 per cent available through a green shoe option.
- The Uttar Pradesh government made provisions for a host of new initiatives across sectors, with an outlay of over Rs 43,565 crore in the Budget for the financial year 2026-27.

Domestic Debt Market Indicators

Instrument	11-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.65%	4.45%	5.30%	4.90%	7.00%	6.33%
3-Month T-Bill	5.32%	5.33%	5.30%	5.44%	6.34%	6.41%
6-Month T-Bill	5.55%	5.55%	5.53%	5.56%	6.47%	6.51%
1-year T-Bill	5.59%	5.62%	5.55%	5.55%	6.40%	6.52%
3-Month CD	6.93%	7.00%	6.62%	6.00%	7.00%	7.44%
6-Month CD	7.05%	7.12%	6.85%	6.22%	7.25%	7.62%
1-year CD	6.92%	6.95%	6.87%	6.39%	7.15%	7.58%
3-Month CP	7.55%	7.60%	6.95%	6.56%	7.25%	7.76%
6-Month CP	7.60%	7.65%	7.17%	6.74%	7.55%	7.90%
1-year CP	7.45%	7.52%	7.22%	6.87%	7.45%	7.90%
1-year Gilt	5.69%	5.67%	5.64%	5.54%	6.40%	6.60%
3-year Gilt	5.99%	5.99%	5.91%	5.90%	6.44%	6.63%
5-year Gilt	6.48%	6.48%	6.37%	6.16%	6.45%	6.67%
1-year AAA	7.09%	7.12%	6.98%	6.55%	7.29%	7.49%
3-year AAA	7.21%	7.22%	7.00%	6.70%	7.11%	7.33%
5-year AAA	7.26%	7.28%	7.21%	6.77%	7.11%	7.24%
10-year G-sec	6.71%	6.73%	6.63%	6.50%	6.58%	6.70%
Net LAF (Rs Cr)	336776	311006	21299	211058	-9354	-190867
Forex reserves (\$ bn)	723.77	709.41	686.80	689.73	642.49	630.61

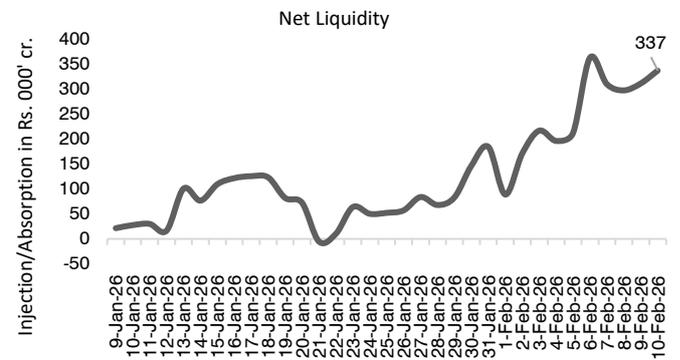
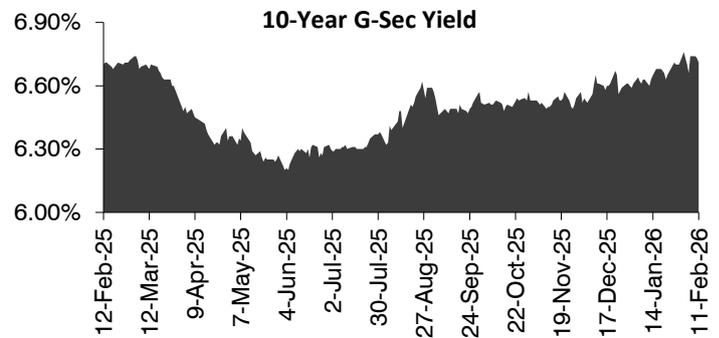
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	7.25	7.99	8.04	9.27	9.75
1 Year	5.69	7.09	7.83	7.88	9.11	9.59
3 Year	5.99	7.21	7.95	8.00	9.23	9.71
5 Year	6.48	7.26	8.10	8.15	9.38	9.86
10 Year	6.71	7.42	8.26	8.31	9.54	10.02

Rs. Cr (Debt)	FII Inv 10-Feb	MF Inv 9-Feb
Buy	264	14,220
Sell	82	19,470
Net	183	-5,250
Net (MTD)	669	-36,338
Net (YTD)	-5,608	-127,145

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

- SteamPRO raised Rs 3.8 crore in seed funding in a round co-led by Anicut Capital, Zerpearl VC, D2C Insider Super Angels and Atrium Ventures, with participation from other strategic angel investors.
- Olyv raised \$23 million in its Series B funding round led by The Fundamentum Partnership, with participation from SMBC Asia Rising Fund.



Global market indices	11-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50121.4	-0.13	1.25	19.33	12.40
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	10472.11	1.14	3.43	22.01	19.31
Hang Seng	27266.38	0.31	3.94	17.94	28.04
Taiwan	33605.71	1.61	10.95	62.38	43.71

Global debt	11-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.18	4.16	4.18	4.13	4.23	4.54
UK 10-Year (%)	4.48	4.51	4.38	4.38	4.68	4.51
German 10-Year (%)	2.80	2.80	2.83	2.66	2.73	2.43
Japan 10-Year (%)	2.24	2.23	2.09	1.69	1.49	1.32

Domestic	11-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	157322	0.68	14.73	76.44	84.04
Silver (Rs / Kg)	266449	2.84	9.74	164.09	182.94
Aluminium (Rs / Kg)	314	1.01	0.53	25.22	21.96
Copper (Rs / kg)	1253	1.29	1.46	39.49	47.65
Lead (Rs / kg)	194	-0.84	1.23	3.89	3.77
Zinc (Rs /Kg)	333	0.86	6.23	21.20	22.92
Nickel (Rs / kg)	1602	2.67	-0.01	13.16	17.57

Global	11-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5008.49	-0.93	12.49	61.51	72.31
Silver (oz/\$)	8071.00	-2.19	6.80	136.55	151.90
Brent (\$/bbl)	69.40	0.87	9.57	-7.18	-9.87
NYMEX crude (\$/bbl)	64.63	1.05	9.32	-9.58	-11.85

Global markets

- Wall Street stocks closed lower on Wednesday as stronger than expected non-farm payrolls data raised expectations that the Fed may slow the pace of rate cuts.
- 10-year US bond yield ended higher at 4.18% amid better-than-expected jobs data.
- FTSE index closed higher on Wednesday due to gains in homebuilders and energy stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- The US economy added 130,000 payrolls in January 2026, compared to a revised 48,000 rise in December 2025.
- US unemployment rate ticked down to 4.3% in January 2026 compared to 4.4% in December 2025.
- Japan producer prices rose 2.3% year-on-year in January 2026, compared to a 2.4% increase in December 2025.

Commodity

- Crude oil prices rose by 67 cents to \$64.63 a barrel on the NYMEX amid concerns over escalating US-Iran tensions ahead of renewed talks.
- Domestic gold prices rose due to safe haven buying.

Forthcoming results

NA	NA
----	----

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully