Daily Market Monitor

February 27, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	26 Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25497	0.06	1.79	8.41	13.08
BSE Sensex	82249	-0.03	0.87	6.24	10.25
BSE 100	26772	0.14	2.11	8.93	13.93
BSE 200	11625	0.20	3.06	9.63	14.63
BSE 500	36748	0.19	3.20	9.44	14.40
BSE SmallCap	48943	0.17	4.52	4.94	8.64
BSE MidCap	46111	0.48	4.21	11.03	15.77
BSE LargeCap	9889	0.16	2.92	9.46	14.47
Sectoral indices					
BSE IT	29675	0.09	-19.57	-17.85	-22.93
BSE Oil & Gas	29602	1.03	10.59	17.78	26.94
BSE FMCG	19029	-0.12	1.21	-2.15	0.03
BSE Auto	63382	0.63	6.42	32.86	30.82
BSE Bankex	68838	0.43	4.52	15.61	24.17
BSE Teck	15736	0.30	-14.11	-9.30	-12.27
BSE Capital Goods	70804	0.88	14.60	12.88	23.35
BSE Consumer Durable	59206	-0.16	4.15	8.87	8.32

Turnover (Rs Cr)	26 Feb	25 Feb
BSE Cash	10030	10464
NSE Cash	108666	108504
NSE F&O	12342231	12207657

Rs. Cr (Equity)	FII Inv 25 Feb	MF Inv 20 Feb	DII Inv 26 Feb
Buy	17,766	11,207	19,243
Sell	16,673	9,391	14,211
Net	1,093	1,816	5,032
Net (MTD)	25,044	-1,955	25,973
Net (YTD)	-8,654	40,400	88,303

	26 Feb	1Day	Month ago	Year ago
USD	90.91	90.95	91.62	87.00
GBP	123.25	123.01	123.62	109.93
Euro	107.44	107.36	107.62	91.16
100 Yen	58.27	58.44	57.75	58.09

Indian markets

- Indian equity benchmarks closed flat on Thursday, as gains in select index heavyweights were largely offset by losses in financial stocks amid the lack of fresh domestic triggers ahead of key data releases.
- The top gainers were Tata Motors Passenger Vehicles, Eicher Motors, Bharat Electronics, Shriram Finance and Max Healthcare Institute, up 1.69%-2.93%.
- The top losers were Trent, Coal India, Eternal, Tata Consumer Products and HDFC Bank, down 1.28%-1.56%.

Indian debt

- The interbank call-money rate ended flat at 4.75% on Thursday.
- Government bond prices ended lower on Thursday due to caution ahead of the auction and the release of new-series GDP data.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.69% on Thursday compared to 6.68% on Wednesday.

Indian Rupee

- The rupee closed higher against the US dollar on Thursday, driven by foreign fund inflows and a softer dollar index.

Regulatory

- The Securities and Exchange Board of India (Sebi) directed all its regulated entities to prominently disclose their registered name and registration number on social media platforms while posting securities market-related content.
- SEBI revised valuation norms for physical gold and silver held by mutual funds, mandating use of domestic polled spot prices from recognised exchanges instead of London benchmarks.
- The Insolvency and Bankruptcy Board of India (IBBI) mandated that information memorandum for a company undergoing insolvency proceedings include details of all allottees, even if they have not submitted a claim to the resolution professional.

Economy and Government

- Indian Railways is set to launch a new RailTech Policy, announced by Union Railway Minister Ashwini Vaishnaw, aimed at promoting technological advancements and innovative solutions within the rail network.
- India and Israel strengthened strategic ties announcing new initiatives across defense, trade, innovation, energy, space technology, and digital payments, marking a significant upgrade in bilateral cooperation.

Domestic Debt Market Indicators

Instrument	26 Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.75%	4.75%	5.30%	5.05%	7.00%	5.90%
3-Month T-Bill	5.31%	5.29%	5.50%	5.35%	6.34%	6.38%
6-Month T-Bill	5.46%	5.50%	5.62%	5.51%	6.47%	6.53%
1-year T-Bill	5.54%	5.58%	5.68%	5.51%	6.40%	6.51%
3-Month CD	7.00%	6.99%	6.98%	5.89%	7.00%	7.45%
6-Month CD	7.00%	7.00%	7.05%	6.23%	7.25%	7.58%
1-year CD	6.87%	6.88%	7.03%	6.40%	7.15%	7.55%
3-Month CP	7.44%	7.44%	7.45%	6.50%	7.25%	7.73%
6-Month CP	7.40%	7.44%	7.52%	6.71%	7.55%	7.83%
1-year CP	7.25%	7.28%	7.69%	6.80%	7.45%	7.80%
1-year Gilt	5.53%	5.59%	5.77%	5.54%	6.40%	6.56%
3-year Gilt	5.88%	5.88%	5.96%	5.86%	6.44%	6.58%
5-year Gilt	6.39%	6.39%	6.41%	6.14%	6.45%	6.67%
1-year AAA	7.10%	7.10%	7.17%	6.63%	7.29%	7.49%
3-year AAA	7.15%	7.15%	7.26%	6.73%	7.11%	7.30%
5-year AAA	7.24%	7.24%	7.31%	6.80%	7.11%	7.26%
10-year G-sec	6.69%	6.68%	6.65%	6.49%	6.58%	6.71%
Net LAF (Rs Cr)	225364	234267	63649	114582	-9354	-196172
Forex reserves ($ bn)	725.73	717.06	701.36	692.58	642.49	635.72

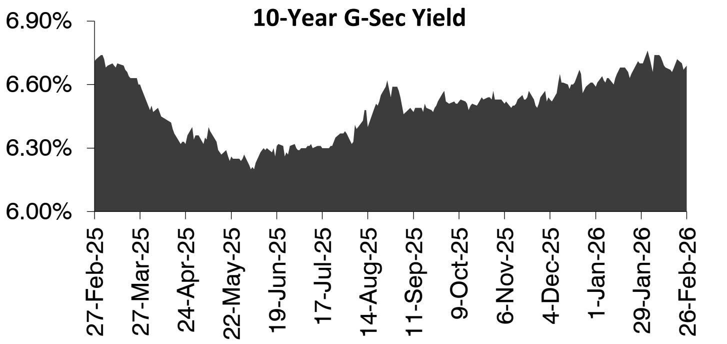
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.46	7.36	8.10	8.15	9.38	9.86
1 Year	5.53	7.10	7.84	7.89	9.12	9.60
3 Year	5.88	7.15	7.89	7.94	9.17	9.65
5 Year	6.39	7.24	8.08	8.13	9.36	9.84
10 Year	6.69	7.40	8.24	8.29	9.52	10.00

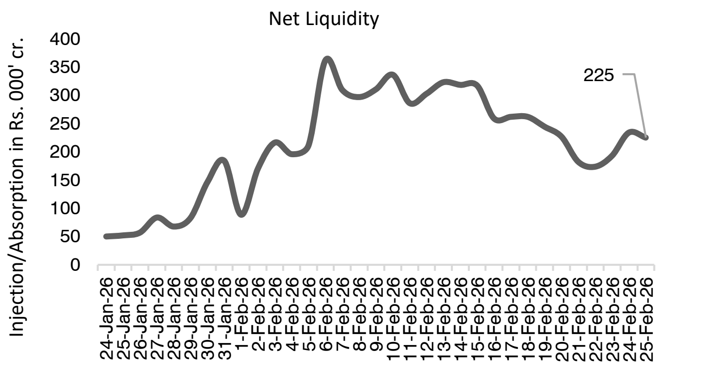
Rs. Cr (Debt)	FII Inv 26 Feb	MF Inv 20 Feb
Buy	2,714	14,311
Sell	2,361	21,071
Net	353	-6,761
Net (MTD)	5,448	-63,331
Net (YTD)	-829	-154,138

EconomicIndicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	1.81% (Jan'26)	-1.21% (Oct'25)	2.51% (Jan'25)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-JunFY26)	5.6% (Jul-Sep FY25)
India Manufacturing PMI	55.5 (Jan-26)	57.7 (Sep-25)	57.7 (Jan-25)
India Service PMI	59.3 (Jan-26)	60.9 (Sep-25)	56.5 (Jan-25)
Bank Credit Growth*	1.56% (Jan 31, 2026)	-1.45% (Jan 15, 2026)	
Bank Deposit Growth*	1.75% (Jan 31, 2026)	-0.94% (Jan 15, 2026)	

Capital markets

- Vedanta Ltd approved raising up to Rs 3,000 crore through debentures on a private placement basis.
- Motilal Oswal raised Rs 1,700 crore with the first close of its latest private credit vehicle, the India Credit Excellence Fund.
- Companion Labs raised $2.5 million led by Peak XV's Surge programme.
- Gushwork raised $9 million (about Rs 81 crore), in a funding round led by Susquehanna Asia VC and plans to invest in product development, hiring talents and customer acquisition.
- Tattvam AI raised $1.7 million in pre-seed funding led by Seedcamp, with participation from EWOR, Entropy Industrial Ventures, Concept Ventures, and semiconductor angel Stan Boland.





Global market indices	26 Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49499.2	0.03	0.18	17.85	13.97
Nikkei 225	58753.39	0.29	11.10	64.96	54.04
FTSE	10846.7	0.37	6.88	26.38	24.23
Hang Seng	26381.02	-1.44	-1.44	14.11	10.90
Taiwan	35414.49	0.00	10.45	71.12	52.51

Global debt	26 Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.02	4.05	4.22	4.00	4.23	4.25
UK 10-Year (%)	4.27	4.32	4.50	4.42	4.68	4.50
German 10-Year (%)	2.70	2.71	2.87	2.67	2.73	2.44
Japan 10-Year (%)	2.16	2.13	2.24	1.80	1.49	1.36

Domestic	26 Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	158022	-0.62	2.41	77.23	82.37
Silver (Rs / Kg)	260667	-1.79	-17.95	158.36	172.18
Aluminium (Rs / Kg)	312	1.04	-1.39	24.26	18.89
Copper (Rs / kg)	1231	1.96	-1.29	37.00	41.94
Lead (Rs / kg)	196	2.24	1.82	5.12	6.00
Zinc (Rs /Kg)	330	-0.68	3.13	20.19	20.28
Nickel (Rs / kg)	1639	-0.39	-3.38	15.84	20.82

Global	26 Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	5207.12	0.95	4.38	67.91	76.74
Silver (oz/$)	9102.00	4.01	-11.89	166.76	188.68
Brent ($/bbl)	70.75	-0.14	7.87	-5.38	-2.45
NYMEX crude ($/bbl)	65.21	-0.32	7.55	-8.77	-4.97

Upcoming market indicators

Date	Indicator	Previous
Feb 26	Japan Construction Orders YoY JAN	20.2%
Feb 27	India Fiscal Year GDP Growth 2nd Est 2025-26	6.5%
Feb 28	China RatingDog Manufacturing PMI Feb	50.3
Mar 3	Eurozone Inflation Rate YoY Flash Feb	-
Mar 4	Eurozone PPI Jan	-2.1%

Global markets

- Wall Street stocks ended mixed on Thursday with Nasdaq ending lower due to selloff in technology stocks following disappointing earnings results while DowJones rose marginally due to gains in cyclical sectors.
- 10-year US bond yield ended lower at 4.02% as investors were remained caution ahead of release of key economic data.
- FTSE index ended higher on Thursday buoyed by upbeat earnings results from car manufacturer.
- Asian markets were trading mostly mixed at 8.30 AM.
- US Initial jobless claims increased to 212,000 on the third week of February, from 208,000
- US Kansas Fed Manufacturing Index saw a significant improvement in February 2026, rising to 10 points from a negative 2 points in January.
- Eurozone Consumer Inflation Expectations increased to 25.8 in February 2026 compared to 24.1 in January 2026.
- Japan coincident economic index, slipped to 114.3 in December 2025, compared to 114.9 in November 2025 while the leading economic index rose to 111.0 from 109.9.
- Japan's retail sales experienced a turnaround in January 2026, posting a 1.8% year-over-year increase, after declining by 0.9% in the preceding month.
- Japan industrial production increased 2.30% on year in January of 2026 compared to 2.6% in previous month.

Commodity

- Crude oil prices fell by 21 cents to $65.21 a barrel on the NYMEX amid reports of easing geopolitical concerns.
- Domestic gold prices rose due to weakness in the dollar index.

Forthcoming results

NA	NA

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	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	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%