

# Daily Market Monitor

March 5, 2026

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	4 March	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24481	-1.55	-5.03	4.09	10.86
BSE Sensex	79116	-1.40	-5.61	2.20	8.39
BSE 100	25652	-1.72	-5.00	4.37	11.49
BSE 200	11121	-1.87	-4.68	4.88	12.13
BSE 500	35126	-1.92	-4.78	4.61	11.97
BSE SmallCap	46421	-2.31	-6.45	-0.47	7.14
BSE MidCap	43841	-2.36	-4.94	5.56	13.22
BSE LargeCap	9469	-1.82	-4.58	4.82	11.97
Sectoral indices					
BSE IT	29393	0.00	-16.28	-18.63	-19.75
BSE Oil & Gas	27929	-3.56	-3.77	11.12	23.00
BSE FMCG	18230	-1.74	-2.58	-6.26	-0.48
BSE Auto	59341	-2.48	-3.87	24.39	30.42
BSE Bankex	65997	-1.97	-2.51	10.84	20.04
BSE Teck	15560	0.48	-12.58	-10.31	-9.19
BSE Capital Goods	68147	-2.64	-0.09	8.65	19.82
BSE Consumer Durable	56817	-1.76	-2.00	4.48	5.86

Turnover (Rs Cr)	4 March	2 March
BSE Cash	10419	11504
NSE Cash	140954	135373
NSE F&O	9597653	77000300

Rs. Cr (Equity)	FII Inv 2 March	MF Inv 27 Feb	DII Inv 4 March
Buy	13,386	21,177	26,259
Sell	16,375	10,343	14,191
Net	-2,989	10,835	12,068
Net (MTD)	-2,989	10,439	20,662
Net (YTD)	-19,539	52,794	121,257

	4 March	1Day	Month ago	Year ago
USD	92.28	91.45	90.47	87.38
GBP	122.86	122.44	124.11	110.91
Euro	107.01	107.39	107.06	91.59
100 Yen	58.55	58.26	57.89	58.52

## Indian markets

- Indian equity benchmarks closed lower on Wednesday due to the uncertainties in the Middle East, which have led to a significant rise in oil prices and foreign investor outflows.
- The top losers were Tata Steel, Tata Motors Passenger Vehicles, SBI Life Insurance Company, JSW Steel and Larsen & Toubro—down 4.54-7.08%.
- The top gainers were Bharti Airtel, Coal India, Infosys and Tech Mahindra—up 0.15-1.88%.

## Indian debt

- The interbank call-money rate ended higher at 4.85% on Wednesday compared to 4.75% on Monday.
- Government bond prices rose marginally on Wednesday following renewed hopes of de-escalation in the Middle East conflict.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.67% on Wednesday compared to 6.68% on Monday.

## Indian Rupee

- The rupee closed lower against the US dollar on Wednesday as the uncertainties in the Middle East raised fears of prolonged energy disruptions, and deepened concerns over inflation and a widening trade imbalance.

## Regulatory

- Sebi revised the reporting framework for Alternative Investment Funds, replacing detailed quarterly submissions with a comprehensive annual report, reducing compliance burden, improving ease of business, and standardizing filings through the Sebi Intermediary Portal.
- The Securities and Exchange Board of India (Sebi) issued a framework allowing custodians except those backed by banks, to undertake financial services that fall outside the market regulator's purview.

## Economy and Government

- India HSBC Services PMI edged down to 58.1 in February 2026 compared to 58.5 in January 2026 while the HSBC Composite PMI rose to 58.9 from 58.4
- Kuwait has introduced automatic visa relief for Indian nationals and visit visas get a one-month extension

## Domestic Debt Market Indicators

Instrument	4 March	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.85%	4.75%	5.10%	5.45%	7.00%	5.75%
3-Month T-Bill	5.31%	5.22%	5.36%	5.34%	6.34%	6.49%
6-Month T-Bill	5.52%	5.41%	5.58%	5.50%	6.47%	6.57%
1-year T-Bill	5.59%	5.52%	5.62%	5.52%	6.40%	6.52%
3-Month CD	7.10%	7.05%	6.98%	6.00%	7.00%	7.53%
6-Month CD	7.10%	7.00%	7.02%	6.28%	7.25%	7.67%
1-year CD	6.97%	6.90%	6.93%	6.49%	7.15%	7.60%
3-Month CP	7.60%	7.50%	7.60%	6.59%	7.25%	7.80%
6-Month CP	7.60%	7.50%	7.65%	6.70%	7.55%	7.88%
1-year CP	7.40%	7.30%	7.55%	6.90%	7.45%	7.84%
1-year Gilt	5.57%	5.56%	5.65%	5.58%	6.40%	6.59%
3-year Gilt	5.90%	5.88%	5.98%	5.83%	6.44%	6.59%
5-year Gilt	6.35%	6.31%	6.47%	6.24%	6.45%	6.65%
1-year AAA	7.17%	7.10%	7.10%	6.67%	7.29%	7.52%
3-year AAA	7.25%	7.17%	7.16%	6.77%	7.11%	7.33%
5-year AAA	7.32%	7.26%	7.25%	6.84%	7.11%	7.29%
10-year G-sec	6.68%	6.68%	6.70%	6.53%	6.58%	6.74%
Net LAF (Rs Cr)	271941	264927	195988	266258	-9354	-20417
Forex reserves (\$ bn)	723.61	725.73	709.41	688.10	642.49	640.48

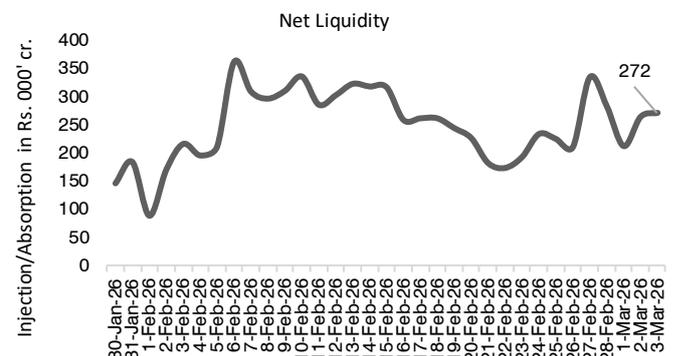
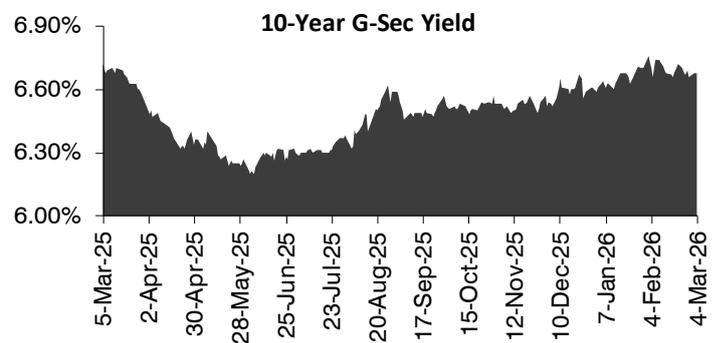
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	7.37	8.11	8.16	9.39	9.87
1 Year	5.57	7.17	7.91	7.96	9.19	9.67
3 Year	5.90	7.25	7.99	8.04	9.27	9.75
5 Year	6.35	7.32	8.16	8.21	9.44	9.92
10 Year	6.68	7.46	8.30	8.35	9.58	10.06

Rs. Cr (Debt)	FII Inv 2 March	MF Inv 27 Feb
Buy	1,683	14,399
Sell	569	18,770
Net	1,114	-4,370
Net (MTD)	1,114	-93,679
Net (YTD)	-337	-184,485

Economic Indicators	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	4.8% (Jan'26)	0.5% (Oct'25)	5.2% (Jan'25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	56.9 (Feb-26)	56.6 (Nov-25)	56.2 (Feb-26)
India Service PMI	59.3 (Jan-26)	60.9 (Sep-25)	56.5 (Jan-25)
Bank Credit Growth*	-0.43% (Feb 15, 2026)		1.56% (Jan 31, 2026)
Bank Deposit Growth*	-0.21% (Feb 15, 2026)		1.75% (Jan 31, 2026)

## Capital markets

- BSE received SEBI approval to launch monthly futures and options for the Sensex Next 30 index, tracking top liquid companies outside Sensex 30.
- India Infrastructure Finance Company Ltd (IIFCL) plans to raise \$1.6 billion (about Rs 14,500 crore) from multilateral agencies and other overseas investors as part of resource mobilisation strategy to support infrastructure development across the country.
- Moneyview filed its draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (Sebi), moving a step closer to its proposed initial public offering (IPO).
- MRF entered a memorandum of understanding (MoU) with the Tamil Nadu government worth Rs 5300 crore to come up with a greenfield manufacturing facility for automotive tyres and allied products at Sipcot Industrial Park in Sivaganga district.
- Axis Bank partnered with Tesla to become its preferred financing partner, under the arrangement, the bank will offer tailored financing solutions and a differentiated customer experience for Tesla buyers.
- GX Group partnered with US chip company Qualcomm for rolling out AI-enhanced Wi-Fi 7 solutions that will be made in India.



Global market indices	4 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	48739.41	0.49	-1.54	16.04	14.62
Nikkei 225	54245.54	-3.61	-0.09	52.30	45.31
FTSE	10567.65	0.80	1.59	23.13	20.65
Hang Seng	25249.48	-2.01	-5.95	9.21	10.06
Taiwan	32828.88	-4.35	1.67	58.63	45.28

Global debt	4 March	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.09	4.06	4.29	4.11	4.23	4.22
UK 10-Year (%)	4.44	4.48	4.56	4.43	4.68	4.53
German 10-Year (%)	2.75	2.78	2.86	2.77	2.73	2.48
Japan 10-Year (%)	2.12	2.15	2.25	1.94	1.49	1.43

Domestic	4 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	162548	-2.94	3.78	82.30	88.06
Silver (Rs / Kg)	271347	-6.38	-3.94	168.95	184.75
Aluminium (Rs / Kg)	328	1.66	3.81	30.82	26.43
Copper (Rs / kg)	1235	-2.45	-2.02	37.43	43.26
Lead (Rs / kg)	194	-0.64	-2.71	3.83	2.16
Zinc (Rs /Kg)	331	-0.60	0.56	20.69	21.28
Nickel (Rs / kg)	1621	-1.12	0.43	14.55	17.00

Global	4 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5112.36	-1.12	4.15	64.86	76.79
Silver (oz/\$)	8320.00	-2.01	0.01	143.85	162.54
Brent (\$/bbl)	81.40	0.00	17.19	8.87	14.58
NYMEX crude (\$/bbl)	74.66	0.13	14.61	4.45	9.38

## Global markets

- Wall Street stocks rose on Wednesday as Iran signaled openness to talks and the U.S. announced naval escorts for tankers in the Strait of Hormuz.
- 10-year US bond yield ended higher at 4.09% due to upbeat economic data.
- FTSE index ended higher on Wednesday on easing worries after the US President's promise of political risk insurance and financial guarantees for maritime trade in the Gulf.
- Asian markets were trading mostly higher at 8.30 AM.
- The US economy added 63,000 jobs in February 2026, compared to a downwardly revised 11,000 rise in January 2026.
- US ISM Services PMI climbed to 56.1 in February 2026 compared to 53.8 in January 2026.
- US S&P Global Services PMI fell to 51.7 in February of 2026 compared to 52.7 in January 2026 while the S&P Global Composite PMI dropped to 51.9 from 53.
- Eurozone HCOB Services PMI inched higher to 51.9 in February 2026 compared to 51.6 in January 2026 while the HCOB Composite PMI climbed to 51.9 from 51.3.
- Eurozone producer prices fell 2.1% year over year in January 2026, compared to a 2.0% decline in December 2025.
- UK S&P Global Services PMI edged down at 53.9 in February 2026, compared to 54 in January 2026 while the S&P Global Composite PMI stood at 53.7 in February 2026, unchanged from January.
- UK unemployment rate edged down to an all-time low of 6.1% in January 2026 compared to 6.2% in December 2025.
- Japan consumer confidence index rose to 40.0 in February 2026 compared to 37.9 in January 2026.

## Commodity

- Crude oil prices rose by 10 cents to \$74.66 a barrel on the NYMEX as Middle East tensions and Strait of Hormuz disruptions kept supply concerns elevated.
- Domestic gold prices fell due to profit booking.

## Forthcoming results

Date	Indicator	Previous
NA	NA	NA

## Upcoming market indicators

Date	Indicator	Previous
Mar 5	US Export/Import prices, Jan	3.1%/0%
Mar 9	China Inflation Rate, Feb	0.2%
Mar 10	Japan GDP Growth Rate QoQ Final Q4	-0.6%
Mar 11	US CPI Feb	325.25
Mar 12	India Inflation Rate Feb	2.13%

**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	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%

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