

Daily Market Monitor

March 6, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	5 March	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24766	1.17	-3.42	5.30	10.87
BSE Sensex	80016	1.14	-3.96	3.36	8.53
BSE 100	25965	1.22	-3.37	5.65	11.31
BSE 200	11261	1.26	-3.04	6.20	11.78
BSE 500	35579	1.29	-3.04	5.96	11.51
BSE SmallCap	47004	1.26	-4.28	0.78	5.54
BSE MidCap	44456	1.40	-3.20	7.04	11.83
BSE LargeCap	9587	1.26	-2.91	6.13	11.82
Sectoral indices					
BSE IT	29246	-0.50	-16.06	-19.04	-21.77
BSE Oil & Gas	28303	1.34	-2.54	12.61	21.65
BSE FMCG	18320	0.49	-1.62	-5.80	-1.67
BSE Auto	60498	1.95	-1.38	26.82	29.78
BSE Bankex	66411	0.63	-1.67	11.54	19.87
BSE Teck	15531	-0.18	-11.94	-10.48	-11.18
BSE Capital Goods	69710	2.29	3.31	11.14	19.86
BSE Consumer Durable	57729	1.60	0.45	6.16	5.96

Turnover (Rs Cr)	5 March	4 March
BSE Cash	9258	10419
NSE Cash	124023	140954
NSE F&O	10928344	9597653

Rs. Cr (Equity)	FII Inv 4 March	MF Inv 2 March	DII Inv 5 March
Buy	20,256	16,545	18,821
Sell	29,370	10,406	13,668
Net	-9,113	6,139	5,153
Net (MTD)	-12,102	6,139	25,815
Net (YTD)	-28,652	58,933	126,411

	5 March	1Day	Month ago	Year ago
USD	91.63	92.28	90.40	87.09
GBP	122.05	122.86	123.03	111.45
Euro	106.26	107.01	106.55	92.63
100 Yen	58.31	58.55	57.60	58.19

Indian markets

- Indian equity benchmarks closed higher on Thursday, driven by easing Middle East uncertainties.
- The top gainers were Adani Ports and Special Economic Zone, Hindalco Industries, Larsen & Toubro, Bharat Electronics, and NTPC, up 3.18- 3.82%.
- The top losers were Tech Mahindra, ICICI Bank, HCL Technologies, State Bank of India, and Tata Consultancy Services, down 0.49- 1.38%.

Indian debt

- The interbank call-money rate ended flat at 4.85% on Thursday.
- Government bond prices rose on Thursday supported by suspected central bank intervention and strong institutional demand.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.64% on Thursday compared to 6.67% on Wednesday.

Indian Rupee

- The rupee closed lower against the US dollar on Thursday, supported by suspected central bank intervention.

Economy and Government

- India and Finland are on the path to an enhanced alliance, as Prime Minister Narendra Modi and President Alexander Stubb embrace a strategic partnership tailored for the future.
- According to the government's pre-budget Economic Survey tabled in the state assembly, Maharashtra's economy is expected to grow at 7.9% in 2025-26, slightly higher than the projected 7.4% growth of the national economy.

Domestic Debt Market Indicators

Instrument	5 March	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.85%	4.85%	5.05%	5.35%	7.00%	5.95%
3-Month T-Bill	5.30%	5.31%	5.33%	5.25%	6.34%	6.51%
6-Month T-Bill	5.51%	5.52%	5.54%	5.45%	6.47%	6.59%
1-year T-Bill	5.58%	5.59%	5.59%	5.45%	6.40%	6.57%
3-Month CD	7.15%	7.10%	6.95%	5.87%	7.00%	7.58%
6-Month CD	7.05%	7.10%	6.98%	6.22%	7.25%	7.69%
1-year CD	6.95%	6.97%	6.89%	6.40%	7.15%	7.63%
3-Month CP	7.60%	7.60%	7.45%	6.35%	7.25%	7.80%
6-Month CP	7.55%	7.60%	7.50%	6.60%	7.55%	7.88%
1-year CP	7.40%	7.40%	7.37%	6.80%	7.45%	7.88%
1-year Gilt	5.60%	5.57%	5.67%	5.51%	6.40%	6.58%
3-year Gilt	5.91%	5.90%	5.96%	5.77%	6.44%	6.58%
5-year Gilt	6.32%	6.35%	6.45%	6.18%	6.45%	6.63%
1-year AAA	7.12%	7.17%	7.15%	6.65%	7.29%	7.59%
3-year AAA	7.20%	7.25%	7.15%	6.75%	7.11%	7.40%
5-year AAA	7.27%	7.32%	7.21%	6.82%	7.11%	7.36%
10-year G-sec	6.65%	6.68%	6.66%	6.52%	6.58%	6.72%
Net LAF (Rs Cr)	267460	271941	211646	229612	-9354	-54477
Forex reserves (\$ bn)	723.61	725.73	709.41	686.23	642.49	640.48

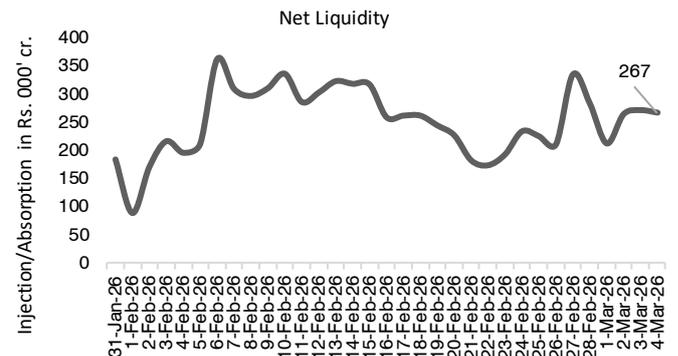
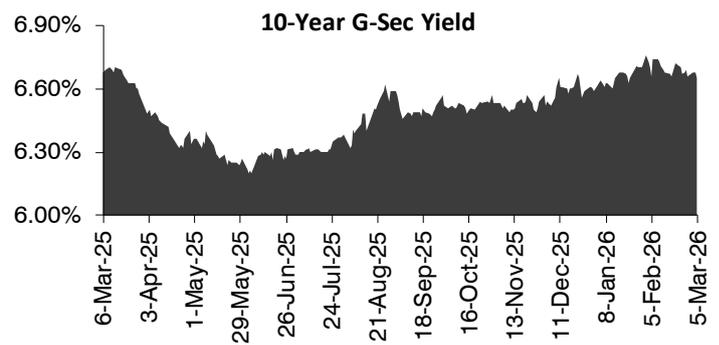
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.51	7.37	8.11	8.16	9.39	9.87
1 Year	5.60	7.12	7.86	7.91	9.14	9.62
3 Year	5.91	7.20	7.94	7.99	9.22	9.70
5 Year	6.32	7.27	8.11	8.16	9.39	9.87
10 Year	6.65	7.41	8.25	8.30	9.53	10.01

Rs. Cr (Debt)	FII Inv 4 March	MF Inv 2 March
Buy	921	12,300
Sell	532	15,435
Net	389	-3,135
Net (MTD)	1,503	-3,135
Net (YTD)	51	-187,621

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

- 1Point1 Solutions completed the acquisition of Costa Rica-based peer Netcom Business Contact Center SA for \$33.37 million.
- Ramky Infrastructure secured a Rs 1,401.84 crore EPC contract from Maharashtra Industrial Township for infrastructure works at Dighi Port Industrial Area Phase 1.
- Embassy Office Parks REIT raised Rs 1,400 crore through a 10-year Non-Convertible Debenture (NCD) issuance, further strengthening its long-term capital structure as institutional investors continue to show strong appetite for high-quality office assets.
- Sage raised \$65 million in new funding to expand its artificial intelligence platform designed to help caregivers in nursing homes and assisted living facilities.
- Rozana raised Rs 290 crore in a Series B funding round.



Global market indices	5 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47954.74	-1.61	-1.95	14.17	11.51
Nikkei 225	55278.06	1.90	2.71	55.20	47.73
FTSE	10413.94	-1.45	1.02	21.33	18.94
Hang Seng	25321.34	0.28	-5.82	9.52	7.32
Taiwan	33672.94	2.57	5.89	62.70	47.22

Global debt	5 March	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.13	4.09	4.21	4.14	4.23	4.28
UK 10-Year (%)	4.55	4.44	4.57	4.48	4.68	4.67
German 10-Year (%)	2.85	2.75	2.84	2.80	2.73	2.78
Japan 10-Year (%)	2.15	2.12	2.22	1.95	1.49	1.43

Domestic	5 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	160586	-1.21	5.30	80.10	86.08
Silver (Rs / Kg)	264212	-2.63	3.88	161.88	175.24
Aluminium (Rs / Kg)	332	1.07	7.64	32.21	27.54
Copper (Rs / kg)	1219	-1.24	-0.31	35.72	39.22
Lead (Rs / kg)	195	0.85	-0.38	4.72	3.74
Zinc (Rs /Kg)	330	-0.23	2.34	20.41	19.69
Nickel (Rs / kg)	1615	-0.38	2.15	14.12	15.00

Global	5 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5123.47	0.22	4.03	65.21	76.07
Silver (oz/\$)	8380.00	0.72	-1.06	145.60	163.69
Brent (\$/bbl)	85.41	4.93	26.44	14.23	23.25
NYMEX crude (\$/bbl)	81.01	8.51	28.00	13.33	22.17

Global markets

- Wall Street stocks ended lower on Thursday as rising crude oil prices following escalating geopolitical tensions spurred inflation worries and doubt over US Fed rate cut plans.
- 10-year US bond yield ended higher at 4.13% after the latest developments in the US-Iran war and newly released economic data put investors back on edge.
- FTSE index ended lower on Thursday as bond yields climbed on expectations that a jump in oil prices driven by the Middle East conflict will stoke inflation.
- Asian markets were trading mostly mixed at 8.30 AM.
- US export prices increase by 2.6% year-on-year in January 2026, compared to an upwardly revised 3.4% rise in December 2025 while the import prices eased to -0.10% from 0%.
- US initial jobless claims were unchanged from the previous week at 213,000 on the last week of February.
- US nonfarm business sector rose 2.8% in the fourth quarter of 2025, compared to a sharp 5.2% increase in the previous quarter.
- Eurozone Construction PMI increased to 46 in February 2026 compared to 45.3 in January 2026.
- Eurozone retail sales rose 2.0% year over year in January 2026, compared to an upwardly revised 1.8% gain in December 2025
- UK S&P Global Construction PMI fell to 44.5 in February 2026 compared to 46.4 in January 2026.

Commodity

- Crude oil prices rose by \$6.35 to \$81.01 a barrel on the NYMEX on growing disruption to global oil supplies caused by the U.S.-Israeli war with Iran.
- Domestic gold prices decline due to continuous profit booking.

Forthcoming results

Company	Results
NA	NA

Upcoming market indicators

Date	Indicator	Previous
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%
Mar 13	US GDP Sales QoQ 2nd Est Q4	4.5%

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