

Daily Market Monitor

March 13, 2026

TATA
mutual fund

Domestic Market Performance

| Indian market indices | 12 March | 1D % Chg | 1M % Chg | FYTD % Chg | 1Yr % Chg |
|-----------------------|----------|----------|----------|------------|-----------|
| Nifty 50 | 23639 | -0.95 | -8.40 | 0.51 | 5.20 |
| BSE Sensex | 76034 | -1.08 | -9.13 | -1.78 | 2.71 |
| BSE 100 | 24859 | -0.85 | -8.09 | 1.14 | 6.20 |
| BSE 200 | 10817 | -0.74 | -7.66 | 2.01 | 7.19 |
| BSE 500 | 34300 | -0.66 | -7.42 | 2.15 | 7.46 |
| BSE SmallCap | 46466 | -0.34 | -7.20 | -0.37 | 5.32 |
| BSE MidCap | 43320 | -0.34 | -6.81 | 4.31 | 10.05 |
| BSE LargeCap | 9193 | -9.99 | -7.72 | 1.77 | 6.82 |
| Sectoral indices | | | | | |
| BSE IT | 28648 | -0.39 | -10.82 | -20.69 | -19.46 |
| BSE Oil & Gas | 27498 | 0.52 | -5.62 | 9.41 | 15.90 |
| BSE FMCG | 17709 | -1.62 | -7.11 | -8.94 | -6.08 |
| BSE Auto | 55698 | -2.92 | -11.85 | 16.76 | 19.27 |
| BSE Bankex | 61977 | -1.17 | -8.95 | 4.09 | 12.21 |
| BSE Teck | 15029 | -0.33 | -10.53 | -13.37 | -11.23 |
| BSE Capital Goods | 69705 | 0.55 | 0.95 | 11.13 | 20.61 |
| BSE Consumer Durable | 56343 | -0.49 | -5.71 | 3.61 | 5.85 |

| Turnover (Rs Cr) | 12 March | 11 March |
|------------------|----------|----------|
| BSE Cash | 8906 | 7545 |
| NSE Cash | 123891 | 110325 |
| NSE F&O | 8706267 | 8768708 |

| Rs. Cr (Equity) | FII Inv 11 March | MF Inv 10 March | DII Inv 12 March |
|-----------------|------------------|-----------------|------------------|
| Buy | 12,624 | 13,312 | 19,440 |
| Sell | 18,536 | 8,571 | 11,990 |
| Net | -5,912 | 4,741 | 7,450 |
| Net (MTD) | -39,861 | 35,288 | 60,549 |
| Net (YTD) | -56,411 | 88,082 | 161,145 |

| | 12 March | 1Day | Month ago | Year ago |
|---------|----------|--------|-----------|----------|
| USD | 92.35 | 91.93 | 90.59 | 87.26 |
| GBP | 123.47 | 123.64 | 123.36 | 112.81 |
| Euro | 106.62 | 106.96 | 107.45 | 95.14 |
| 100 Yen | 58.07 | 58.21 | 59.10 | 58.92 |

Indian markets

- Indian equity benchmarks closed lower on Thursday, dragged down by losses in auto, banking and non-banking financial company stocks amid surging crude oil prices and escalating uncertainties in the Middle East.
- The top losers were Mahindra & Mahindra, Eicher Motors, Maruti Suzuki, Bajaj Finance and Tata Motors Passenger Vehicles Limited, down 3.30-4.39%.
- The top gainers were Coal India, NTPC, Power Grid Corporation, Tech Mahindra and Jio Financial Services, up 1.38-5.20%.

Indian debt

- The interbank call-money rate ended lower at 4.70% on Thursday compared to 4.75% on Wednesday.
- Government bond prices fell on Thursday as escalating geopolitical tensions kept the crude oil prices elevated, pressuring the rupee and denting the bond demand.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.66% on Thursday compared to 6.64% on Wednesday.

Indian Rupee

- The rupee closed lower against the United States dollar on Thursday, pressured by surging crude oil prices, a stronger dollar index and heightened geopolitical uncertainties.

Regulatory

- SEBI eased certification requirements for Persons Associated with Research Services (PARS), allowing sales personnel, relationship managers and other non-research staff to qualify through a simplified certification module aimed at reducing regulatory burden and improving ease of doing business.

Economy and Government

- According to the thirtieth report of the Standing Committee on Finance the Income-tax Department will roll out the new Income-tax Act, 2025 from April 1 with only 54 of the 190 forms required under the new law operational initially, while the remaining forms will be introduced in phases during FY27.
- Union Petroleum and Natural Gas Minister Hardeep Singh Puri said that India is not facing any shortage of crude oil or LPG, even as tensions in West Asia raised concerns over supply disruptions.
- The Central government cleared a Madhya Pradesh government proposal to extend the price deficiency support scheme, also called the Bhavantar Bhugtan Yojana (BBY), to mustard procurement after its use for soybean in 2025.
- According to government data released India consumer price index rose 3.21% annually in February of 2026, compared to the revised 2.74% in January 2026 with base year 2024.

Domestic Debt Market Indicators

| Instrument | 12 March | 1D ago | 1M ago | 3 M ago | FYTD ago | Year ago |
|------------------------|----------|--------|--------|---------|----------|----------|
| Call rate | 4.70% | 4.75% | 4.60% | 5.20% | 7.00% | 6.25% |
| 3-Month T-Bill | 5.33% | 5.30% | 5.28% | 5.27% | 6.34% | 6.50% |
| 6-Month T-Bill | 5.52% | 5.52% | 5.52% | 5.46% | 6.47% | 6.58% |
| 1-year T-Bill | 5.61% | 5.61% | 5.55% | 5.48% | 6.40% | 6.52% |
| 3-Month CD | 7.22% | 7.17% | 6.85% | 6.05% | 7.00% | 7.54% |
| 6-Month CD | 7.30% | 7.17% | 6.99% | 6.35% | 7.25% | 7.68% |
| 1-year CD | 7.00% | 6.98% | 6.90% | 6.60% | 7.15% | 7.59% |
| 3-Month CP | 7.55% | 7.50% | 7.45% | 6.55% | 7.25% | 7.85% |
| 6-Month CP | 7.67% | 7.60% | 7.50% | 6.75% | 7.55% | 7.93% |
| 1-year CP | 7.31% | 7.30% | 7.35% | 7.05% | 7.45% | 7.85% |
| 1-year Gilt | 5.77% | 5.69% | 5.73% | 5.50% | 6.40% | 6.59% |
| 3-year Gilt | 6.09% | 6.06% | 5.98% | 5.81% | 6.44% | 6.57% |
| 5-year Gilt | 6.41% | 6.36% | 6.45% | 6.31% | 6.45% | 6.60% |
| 1-year AAA | 7.28% | 7.19% | 7.01% | 6.80% | 7.29% | 7.57% |
| 3-year AAA | 7.30% | 7.24% | 7.16% | 6.86% | 7.11% | 7.38% |
| 5-year AAA | 7.34% | 7.31% | 7.23% | 6.93% | 7.11% | 7.34% |
| 10-year G-sec | 6.67% | 6.65% | 6.69% | 6.61% | 6.58% | 6.68% |
| Net LAF (Rs Cr) | 239897 | 274311 | 303148 | 213534 | -9354 | -138153 |
| Forex reserves (\$ bn) | 728.49 | 723.61 | 723.77 | 687.26 | 642.49 | 638.70 |

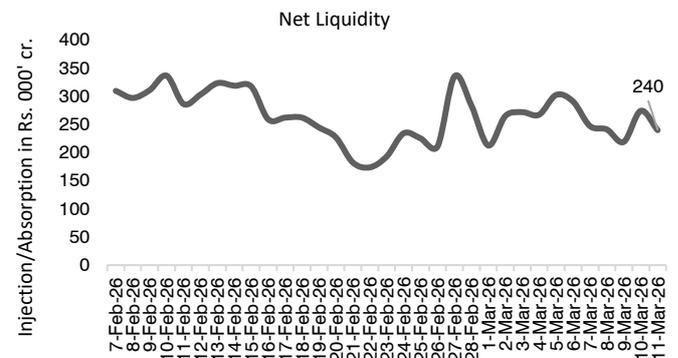
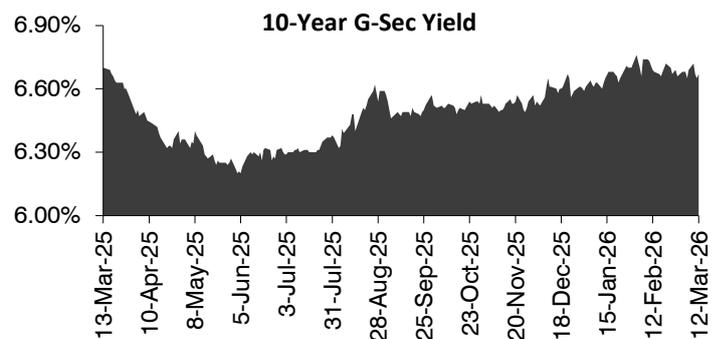
| Yields (%) | G-sec | AAA | AA+ | AA | AA- | A+ |
|------------|-------|------|------|------|------|-------|
| 6 months | 5.52 | 7.47 | 8.21 | 8.26 | 9.49 | 9.97 |
| 1 Year | 5.77 | 7.28 | 8.02 | 8.07 | 9.30 | 9.78 |
| 3 Year | 6.09 | 7.30 | 8.04 | 8.09 | 9.32 | 9.80 |
| 5 Year | 6.41 | 7.34 | 8.18 | 8.23 | 9.46 | 9.94 |
| 10 Year | 6.67 | 7.48 | 8.32 | 8.37 | 9.60 | 10.08 |

| Rs. Cr (Debt) | FII Inv 11 March | MF Inv 10 March |
|---------------|------------------|-----------------|
| Buy | 296 | 26,717 |
| Sell | 586 | 35,827 |
| Net | -290 | -9,110 |
| Net (MTD) | -839 | -35,623 |
| Net (YTD) | -2,290 | -220,108 |

| Economic Indicators | Latest | Quarter/Fortnight | Year Ago |
|-------------------------|-----------------------|---------------------|----------------------|
| CPI | 3.21% (Feb'26) | 0.71% (Nov'25) | 3.61% (Feb'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

- South Indian Bank launched the Employees' Provident Fund payment services through its internet banking platform SIBerNet, in collaboration with the EPFO.
- Bank of Baroda raised a \$500 million five-year syndicated term loan through its International Financial Services Centre (IFSC) Banking Unit in Gujarat International Finance Tec-City (GIFT City).
- Eternal infused Rs 450 crore into quick commerce business Blinkit.
- CARS24 acquired automotive utility app Vehicle Info as part of its strategy to build what it describes as India's first full-stack vehicle ownership platform.



| Global market indices | 12 March | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|-----------------------|-----------|----------|----------|------------|----------|
| DJIA | 46677.85 | -1.56 | -5.61 | 11.13 | 12.88 |
| Nikkei 225 | 54452.96 | -1.04 | -5.53 | 52.88 | 47.89 |
| FTSE | 10,305.15 | -0.47 | -0.94 | 20.07 | 20.66 |
| Hang Seng | 25716.76 | -0.70 | -4.87 | 11.23 | 8.97 |
| Taiwan | 33581.86 | -1.56 | -0.07 | 62.26 | 50.74 |

| Global debt | 12 March | 1D ago | 1M ago | 3M ago | FYTD | 1Y ago |
|--------------------|----------|--------|--------|--------|------|--------|
| US 10-Year (%) | 4.27 | 4.21 | 4.09 | 4.19 | 4.23 | 4.32 |
| UK 10-Year (%) | 4.79 | 4.68 | 4.45 | 4.52 | 4.68 | 4.72 |
| German 10-Year (%) | 2.94 | 2.93 | 2.78 | 2.86 | 2.73 | 2.89 |
| Japan 10-Year (%) | 2.18 | 2.17 | 2.23 | 1.95 | 1.49 | 1.51 |

| Domestic | 12 March | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|---------------------|----------|----------|----------|------------|----------|
| Gold (Rs / 10 gm) | 160303 | 0.05 | 2.99 | 79.78 | 86.09 |
| Silver (Rs / Kg) | 268301 | 0.86 | 3.54 | 165.93 | 173.50 |
| Aluminium (Rs / Kg) | 350 | 2.25 | 11.22 | 39.44 | 31.04 |
| Copper (Rs / kg) | 1235 | 1.45 | -1.93 | 37.49 | 37.74 |
| Lead (Rs / kg) | 198 | 1.26 | 1.31 | 5.89 | 6.01 |
| Zinc (Rs /Kg) | 330 | 0.08 | -1.05 | 20.19 | 17.16 |
| Nickel (Rs / kg) | 1636 | 0.29 | 0.85 | 15.57 | 12.19 |

| Global | 12 March | 1D % Chg | 1M % Chg | FYTD % Chg | 1Y % Chg |
|----------------------|----------|----------|----------|------------|----------|
| Gold (oz/\$) | 5172.01 | -1.17 | 1.94 | 66.78 | 77.41 |
| Silver (oz/\$) | 8534.00 | -4.49 | 1.44 | 150.12 | 160.26 |
| Brent (\$/bbl) | 100.46 | 9.22 | 48.79 | 34.36 | 41.59 |
| NYMEX crude (\$/bbl) | 95.70 | 9.68 | 52.29 | 33.88 | 41.40 |

Global markets

- Wall Street stocks ended lower on Thursday dragged down by sharp gains in oil prices amid ongoing geopolitical tensions.
- 10-year US bond yield ended higher at 4.27% as investors weighed the latest developments in Middle East war and the inflationary risk posed by rising oil prices.
- FTSE index declined on Thursday as a spike in oil prices elevated inflation concerns
- Asian markets were trading mostly lower at 8.30 AM.
- The US trade deficit narrowed sharply to \$54.5 billion in January 2026, the lowest since October, following a revised \$72.9 billion in December 2025.
- US Building Permits decreased to 5.40% in January 2026 compared to 4.80% gain in December of 2025.
- US Housing Starts increased to 7.20% in January compared to downwardly revised 4.80% in December of 2025.
- US Initial jobless claims inched lower by 1,000 from the previous week to 213,000 on the first week of March, compared to 214,000 in the previous period.

Commodity

- Crude oil prices rose by \$8.45 to \$95.70 a barrel on the NYMEX as Iran stepped up attacks on oil and transport facilities across the Middle East.
- Domestic gold prices rose marginally due to escalating geopolitical tensions.

Forthcoming results

| Region | Results |
|--------|---------|
| NA | NA |

Upcoming market indicators

| Date | Indicator | Previous |
|--------|------------------------------------|----------|
| 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% |
| Mar 16 | US Industrial Production Feb | 2.3% |

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 | Feb-26 | Jan-26 | Dec-25 | Nov-25 | Oct-25 | Sep-25 | Aug-25 | Jul-25 | June-25 | May-25 |
|-----------------|--|--------|---------|----------|---------|---------|--------|---------|---------|---------|---------|
| Debt Indicators | Currency in circulation (Rs billion) | 40445 | 39800 | 39079 | 38551 | 38184 | 38071 | 38097 | 38147 | 38372 | 38344 |
| | Repo rate | 5.25% | 5.25% | 5.25% | 5.50% | 5.50% | 5.50% | 5.50% | 5.50% | 5.50% | 6.00% |
| | 10-year G-sec yield | 6.66% | 6.70% | 6.60% | 6.54% | 6.53% | 6.57% | 6.59% | 6.38% | 6.32% | 6.27% |
| | Call rate | 5.12% | 4.80% | 4.85% | 5.50% | 5.10% | 5.00% | 5.45% | 4.95% | 5.25% | 5.75% |
| | Forex reserves (\$ billion; mthly. avg.) | 722 | 696 | 692 | 688 | 699 | 701 | 693 | 698 | 699 | 689 |
| | GDP | NA | NA | 7.80% | | | | 7.40% | | 6.40% | |
| | Fiscal deficit (Rs billion) | NA | 1255.65 | -1208.29 | 1515.27 | 2520.21 | -250.3 | 1297.37 | 1876.84 | 2675.69 | 1731.69 |
| | IIP, %y/y | NA | 4.80% | 8.00% | 7.20% | 0.50% | 4.60% | 4.10% | 4.30% | 1.50% | 1.20% |
| | Exports, \$ billion | NA | 36.56 | 38.51 | 38.13 | 34.38 | 36.38 | 35.1 | 37.24 | 35.14 | 38.73 |
| | Imports, \$ billion | NA | 71.24 | 63.55 | 62.66 | 76.06 | 68.53 | 61.59 | 64.59 | 53.92 | 60.61 |
| | Manufacturing PMI | 56.9 | 55.4 | 55 | 56.6 | 59.2 | 57.7 | 59.3 | 59.1 | 58.4 | 57.6 |
| | Services PMI | 58.1 | 58.5 | 58 | 59.8 | 58.8 | 60.9 | 62.9 | 60.5 | 60.4 | 58.8 |
| | GST collections (Rs crore) | 183609 | 193384 | 174550 | 170276 | 195936 | 189017 | 186315 | 195735 | 184597 | 201050 |
| | India crude oil import (mbpd) | NA | 21.09 | 21.59 | 21.24 | 21.01 | 20.21 | 19.60 | 18.89 | 20.32 | 21.3 |
| Sector update | Auto – Passenger vehicles | NA | 12.20% | 27.90% | 18.59% | 17.46% | 0.20% | -6.90% | 2.30% | -6.80% | -1.1% |
| | Auto – Two-wheelers | NA | 26.20% | 39.40% | 21.17% | 2.15% | 6.66% | 7.14% | 8.70% | -3.40% | 2.2% |
| | Auto – Commercial vehicles | NA | 27.30% | 28.00% | 24.16% | 9.87% | 25.67% | 3.75% | 4.60% | -6.00% | -1.0% |
| | Auto – Tractors | NA | 43.00% | 37.10% | 30.08% | 14.84% | 45.39% | 28.30% | 8.00% | 10.50% | 9.10% |
| | Infra – Coal | NA | 3.10% | 3.60% | 2.10% | -8.50% | -1.20% | 11.40% | -12.30% | -6.80% | 2.8% |
| | Infra – Electricity | NA | 3.80% | 5.30% | -1.5% | -6.9% | 3.1% | 4.1% | 3.70% | -1.20% | -4.7% |
| | Infra – Steel | NA | 9.90% | 6.90% | 6.70% | 5.90% | 14.40% | 13.60% | 16.60% | 9.70% | 7.4% |
| | Infra – Cement | NA | 10.70% | 13.50% | 14.60% | 5.20% | 5.00% | 5.40% | 11.60% | 8.20% | 9.7% |

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