

# Daily Market Monitor

April 06, 2026

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	2 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22713	0.15	-8.66	1.71	-2.65
BSE Sensex	73320	0.25	-8.62	1.91	-4.30
BSE 100	23846	0.16	-8.64	1.88	-2.38
BSE 200	10347	0.11	-8.69	1.88	-1.94
BSE 500	32840	0.08	-8.30	2.04	-1.85
BSE SmallCap	45087	0.28	-5.12	4.32	-4.35
BSE MidCap	41404	-0.21	-7.78	2.14	-0.63
BSE LargeCap	8787	0.13	-8.89	1.82	-2.14
Sectoral indices					
BSE IT	29288	2.42	-0.36	4.88	-17.83
BSE Oil & Gas	25653	-0.76	-11.42	0.36	1.15
BSE FMCG	17087	0.27	-7.90	1.87	-12.46
BSE Auto	53234	-0.65	-12.51	1.18	11.00
BSE Bankex	58009	0.22	-13.84	2.53	-1.93
BSE Teck	15194	1.71	-1.88	3.17	-11.92
BSE Capital Goods	66360	0.00	-5.19	3.30	7.22
BSE Consumer Durable	53320	-0.87	-7.81	1.33	-1.99

Turnover (Rs Cr)	2 Apr	1 Apr
BSE Cash	8541	8940
NSE Cash	117090	127242
NSE F&O	7567603	7130468

Rs. Cr (Equity)	FII Inv 1 Apr	MF Inv 27 Mar	DII Inv 2 Apr
Buy	41,117	29,094	18,421
Sell	60,954	28,877	11,213
Net	-19,837	218	7,208
Net (MTD)	-19,837	89,926	14,380
Net (YTD)	-148,695	142,720	257,936

	2 Apr	1Day	Month ago	Year ago
USD	93.21	94.65	91.45	85.60
GBP	123.19	125.63	122.44	110.56
Euro	107.48	109.01	107.39	92.39
100 Yen	58.49	59.25	58.26	57.09

## Indian markets

- Indian equity benchmarks closed higher on Thursday, buoyed by gains in banking and IT stocks ahead of the start of the fourth-quarter results season.
- The top gainers were HCL Technologies, Tech Mahindra, Tata Consumer Products, Wipro and Infosys, up 1.71% - 3.00%.
- The top losers were Asian Paints, Eicher Motors, Sun Pharmaceutical Industries, Eternal and Bajaj Auto, down 1.75% - 2.49%.

## Indian debt

- The interbank call-money rate ended lower at 5.00% on Thursday compared to 7.00% on Monday.
- Government bond prices ended lower on Thursday as renewed US-Iran tensions pushed oil prices higher, weighing on India's growth-inflation outlook ahead of the April 8th RBI policy decision.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.13% on Thursday compared to 7.00% on Monday.

## Indian Rupee

- The rupee closed higher vs the United States (US) dollar on Thursday, after decisive action by the Reserve Bank of India to curb speculative forex trading.

## Regulatory

- Sebi considers re-introducing open market share buybacks through the stock exchange mechanism, a route that was discontinued earlier amid concerns over transparency and price discovery.

## Economy and Government

- India HSBC Manufacturing PMI fell to 53.9 in March 2026 compared to 56.9 in February 2026.
- According to the RBI data, India Foreign Exchange Reserves decreased to \$688.06 billion in the week March 27 compared to \$698.35 billion in the previous week.
- The Uttar Pradesh (UP) government aims to purchase wheat worth over Rs 12,925 crore to support the farm economy during the current Rabi Marketing Season (2026-27).
- Commerce and Industry Minister Piyush Goyal said India is looking at preferential market access for its products in the US and asserted that the country's relations with America are "very robust" with a deep strategic partnership across technology, defence, trade and investment.

## Domestic Debt Market Indicators

Instrument	2 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	7.00%	4.75%	5.35%	7.00%	5.80%
3-Month T-Bill	5.36%	5.40%	5.22%	5.24%	5.40%	6.23%
6-Month T-Bill	5.63%	5.51%	5.41%	5.42%	5.51%	6.27%
1-year T-Bill	5.67%	5.70%	5.52%	5.51%	5.70%	6.28%
3-Month CD	6.80%	7.35%	7.05%	6.23%	7.35%	6.75%
6-Month CD	7.25%	7.30%	7.00%	6.50%	7.30%	6.98%
1-year CD	7.35%	7.25%	6.90%	6.70%	7.25%	7.05%
3-Month CP	7.20%	7.75%	7.50%	6.65%	7.75%	7.15%
6-Month CP	7.60%	7.65%	7.50%	6.95%	7.65%	7.24%
1-year CP	7.70%	7.60%	7.30%	7.05%	7.60%	7.30%
1-year Gilt	6.02%	5.82%	5.56%	5.67%	5.82%	6.30%
3-year Gilt	6.57%	6.43%	5.88%	5.87%	6.43%	6.33%
5-year Gilt	6.83%	6.90%	6.31%	6.34%	6.90%	6.36%
1-year AAA	7.64%	7.57%	7.10%	6.86%	7.57%	7.10%
3-year AAA	7.69%	7.59%	7.17%	6.89%	7.59%	7.03%
5-year AAA	7.72%	7.67%	7.26%	7.16%	7.67%	7.02%
10-year G-sec	7.12%	7.02%	6.68%	6.61%	7.02%	6.48%
Net LAF (Rs Cr)	184555	127344	264927	61447	245161	193089
Forex reserves (\$ bn)	688.06	698.35	723.61	696.61	642.49	658.80

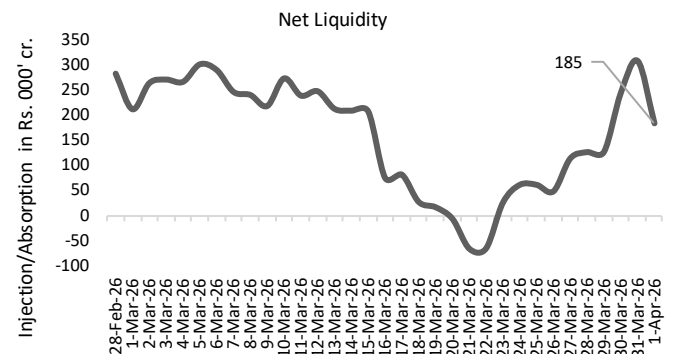
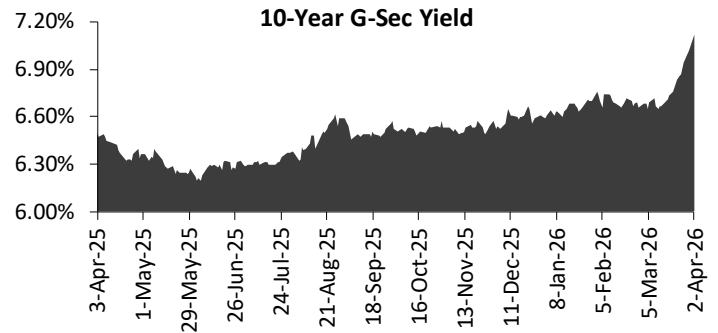
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.63	7.52	8.26	8.31	9.54	10.02
1 Year	6.02	7.64	8.38	8.43	9.66	10.14
3 Year	6.57	7.69	8.43	8.48	9.71	10.19
5 Year	6.83	7.72	8.56	8.61	9.84	10.32
10 Year	7.12	7.79	8.63	8.68	9.91	10.39

Rs. Cr (Debt)	FII Inv 1 Apr	MF Inv 27 Mar
Buy	1,098	8,554
Sell	612	17,844
Net	487	-9,290
Net (MTD)	487	-119,011
Net (YTD)	5,893	-303,496

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.21% (Feb'26)	2.56% (Nov'25)	3.21% (Feb'25)
WPI	2.13% (Feb'26)	-0.32% (Nov'25)	2.45% (Feb'25)
IIP	5.2% (Feb-26)	7.2% (Nov-25)	2.7% (Feb-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*	-0.71% (Mar 15, 2026)		1.68% (Feb 28, 2026)
Bank Deposit Growth*	0.08% (Mar 15, 2026)		1.58% (Feb 28, 2026)

## Capital markets

- Aquapulse raised Rs 25 crore in an ongoing Series A round led by NABVENTURES Ltd, the venture capital arm of NABARD, through the AgriSURE Fund, as it looks to build an integrated aquaculture ecosystem.
- India Infrastructure Finance Company Ltd (IIFCL) plans to raise up to \$1 billion through the MIGA guarantee fund during the ongoing first quarter to support infrastructure development across the country.
- Circulate Capital raised \$220 million in the first close of its second fund and will invest in circular supply chains and recycling ventures across South and Southeast Asia, focusing on plastics, packaging, electronics, and apparel.
- Cabot Sanmar announced the expansion of their fumed silica manufacturing capacity with an investment of Rs 220 crore (\$25 million) to meet growing customer demand in India.
- Real estate developer RPS Group plans to invest Rs 110 crore in plotting project, RPS Azalea in Sector 29, Bahadurgarh.
- Mahagun Group secured Rs 225 crore in funding from CSL Finance to accelerate project completion across its portfolio.



Global market indices	2 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46504.67	-0.13	-4.91	0.35	10.13
Nikkei 225	52463.27	-2.38	-9.64	2.74	46.85
FTSE	10436.29	0.69	-3.19	2.55	21.23
Hang Seng	25116.53	-0.70	-3.62	1.32	8.25
Taiwan	32572.43	-1.82	-7.19	2.68	52.93

Global debt	2 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.31	4.33	4.05	4.19	4.30	4.20
UK 10-Year (%)	2.39	4.83	4.38	4.54	4.88	4.64
German 10-Year (%)	3.00	3.00	2.71	2.90	3.01	2.72
Japan 10-Year (%)	2.39	2.31	2.07	2.07	2.35	1.35

Domestic	2 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	146608	-2.81	-12.46	-0.09	61.11
Silver (Rs / Kg)	227813	-5.01	-21.40	-1.01	128.87
Aluminium (Rs / Kg)	355	0.68	9.91	-0.10	45.22
Copper (Rs / kg)	1195	0.67	-5.54	2.10	33.95
Lead (Rs / kg)	201	1.36	3.18	2.05	9.32
Zinc (Rs /Kg)	326	0.59	-2.00	1.13	20.68
Nickel (Rs / kg)	1650	-0.11	0.64	0.82	17.68

Global	2 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4785.39	2.94	-9.66	5.69	53.72
Silver (oz/\$)	7598.00	1.77	-14.26	7.82	126.13
Brent (\$/bbl)	109.03	7.78	40.25	-7.87	45.47
NYMEX crude (\$/bbl)	111.54	11.41	56.59	10.02	55.54

## Global markets

- Wall Street stocks closed mixed on Thursday with Nasdaq gaining due to technology stocks while Dow Jones declined as energy and industrial stocks stayed under pressure from geopolitical volatility.
- 10-year US bond yield ended lower at 4.31% on the reports that Iran and Oman drafting a protocol to monitor Strait of Hormuz traffic.
- FTSE index closed higher on Thursday boosted by plans for UK-led talks on reopening the Strait of Hormuz by easing fears over disruptions to global trade routes.
- Asian markets were trading mostly lower at 8.30 AM.
- The US economy added 178,000 jobs in March 2026, following a revised decline of 133,000 in February 2026.
- US unemployment rate fell to 4.3% in March 2026 compared to 4.4% in February 2026.
- US trade deficit widened slightly to \$57.3 billion in February 2026 compared to a revised \$54.7 billion in January 2026.
- US Initial jobless claims fell by 9,000 to 202,000 in the fourth week of March compared to 211,000 in the previous week.
- China RatingDog General Services PMI eased to 52.1 in March 2026 compared to 56.7 in February 2026 while the RatingDog General Composite PMI fell to 51.5 from 55.4.
- Japan S&P Global Composite PMI edged down to 53.0 in March 2026 compared to 53.9 in February 2026 while the S&P Global Services PMI eased to 53.4 from 53.8.

## Commodity

- Crude oil prices rose by \$11.42 to \$111.54 a barrel on the NYMEX as renewed tensions around Iran and disruptions near the Strait of Hormuz raised fears of tighter global supply.
- Domestic gold prices declined due to profit booking and strong US dollar index.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
Apr 6	India HSBC Services PMI Final, Mar	58.1
Apr 8	India RBI Interest Rate Decision	5.25%
Apr 10	China Inflation Rate, Mar	1.3%
Apr 13	US Existing Home Sales, Mar	4.09M
Apr 14	China Balance of Trade, Mar	\$213.62B

**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	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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