

# Daily Market Monitor

April 08, 2026

## Domestic Market Performance

Indian market indices	7 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23124	0.68	-5.43	3.55	4.34
BSE Sensex	74617	0.69	-5.45	3.71	2.02
BSE 100	24269	0.62	-5.43	3.68	4.69
BSE 200	10528	0.56	-5.50	3.66	5.29
BSE 500	33395	0.50	-5.21	3.77	5.47
BSE SmallCap	45741	0.20	-2.43	5.84	4.02
BSE MidCap	42040	0.16	-4.74	3.71	7.50
BSE LargeCap	8942	0.62	-5.68	3.63	4.90
Sectoral indices					
BSE IT	30158	2.37	3.21	7.99	-6.08
BSE Oil & Gas	25557	0.66	-9.25	-0.01	8.53
BSE FMCG	17345	0.71	-5.11	3.40	-9.96
BSE Auto	53832	0.11	-10.03	2.31	21.27
BSE Bankex	59308	0.21	-8.74	4.82	3.76
BSE Teck	15607	2.23	1.06	5.97	-1.59
BSE Capital Goods	67382	0.65	-4.58	4.89	18.10
BSE Consumer Durable	54451	-0.18	-5.11	3.48	4.47

Turnover (Rs Cr)	7 Apr	6 Apr
BSE Cash	6474	8507
NSE Cash	110462	116115
NSE F&O	64710618	19735248

Rs. Cr (Equity)	FII Inv 6 Apr	MF Inv 2 Apr	DII Inv 7 Apr
Buy	8,963	13,801	20,860
Sell	17,600	10,116	12,881
Net	-8,637	3,684	7,980
Net (MTD)	-37,944	9,766	30,448
Net (YTD)	-166,801	161,306	274,004

	7 Apr	1Day	Month ago	Year ago
USD	92.96	93.06	91.68	85.81
GBP	123.08	122.99	122.49	110.68
Euro	107.26	107.26	106.41	94.46
100 Yen	58.18	58.32	58.08	59.07

## Indian markets

- Indian equity benchmarks closed higher on Tuesday, driven by gains in IT stocks ahead of earnings as investors stayed cautious amid the Middle East conflict and awaited the RBI's policy decision.
- The top gainers were Wipro, Hindalco Industries, Tata Consultancy Services, HCL Technologies and Infosys, up 2.59-3.71%.
- The top losers were Dr. Reddy's Laboratories, InterGlobe Aviation, Adani Enterprises, Apollo Hospitals Enterprise and Trent, down 0.49-1.63%.

## Indian debt

- The interbank call-money rate ended lower at 4.70% on Tuesday compared to 4.75% on Monday.
- Government bond prices ended flat on Tuesday ahead of the awaited RBI's policy decision due on April 8th, 2026.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 7.05% on Tuesday.

## Indian Rupee

- The rupee closed higher vs the US dollar on Tuesday, ahead of a US deadline to escalate strikes on Iran and the Reserve Bank of India's (RBI) monetary policy decision.

## Regulatory

- The Securities and Exchange Board of India (Sebi) announced a set of one-time relaxations covering IPO timelines and minimum public shareholding (MPS) norms amid heightened market volatility and subdued investor sentiment.

## Economy and Government

- India and Mauritius to sign a MoU this week enabling New Delhi to extend financial assistance for the implementation of projects under a Special Economic Package worth \$655 million.
- The Centre announced a revised "as is where is" based regularisation policy to simplify the permission process for registration of properties and construction activities in unauthorised colonies of the national capital.
- The Government issued draft norms to standardise state and district GDP estimates to ensure consistent, comparable estimates.

## Domestic Debt Market Indicators

Instrument	7 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.70%	4.75%	5.15%	5.35%	7.00%	5.85%
3-Month T-Bill	5.36%	5.36%	5.31%	5.26%	5.40%	6.07%
6-Month T-Bill	5.61%	5.58%	5.51%	5.49%	5.51%	6.20%
1-year T-Bill	5.64%	5.67%	5.60%	5.56%	5.70%	6.20%
3-Month CD	7.00%	7.00%	7.10%	6.50%	7.35%	6.54%
6-Month CD	7.20%	7.25%	7.05%	6.72%	7.30%	6.89%
1-year CD	7.35%	7.35%	6.94%	6.83%	7.25%	6.98%
3-Month CP	7.40%	7.40%	7.60%	6.80%	7.75%	6.87%
6-Month CP	7.60%	7.60%	7.55%	7.05%	7.65%	7.19%
1-year CP	7.75%	7.75%	7.27%	7.10%	7.60%	7.27%
1-year Gilt	6.02%	6.02%	5.65%	5.66%	5.82%	6.27%
3-year Gilt	6.57%	6.57%	6.00%	5.91%	6.43%	6.29%
5-year Gilt	6.76%	6.83%	6.34%	6.34%	6.90%	6.34%
1-year AAA	7.62%	7.64%	7.13%	6.95%	7.57%	7.10%
3-year AAA	7.67%	7.69%	7.23%	6.97%	7.59%	7.03%
5-year AAA	7.70%	7.72%	7.28%	7.21%	7.67%	7.03%
10-year G-sec	7.04%	7.04%	6.69%	6.61%	7.02%	6.49%
Net LAF (Rs Cr)	395331	367958	290993	35384	245161	141274
Forex reserves (\$ bn)	688.06	698.35	728.49	696.61	642.49	665.40

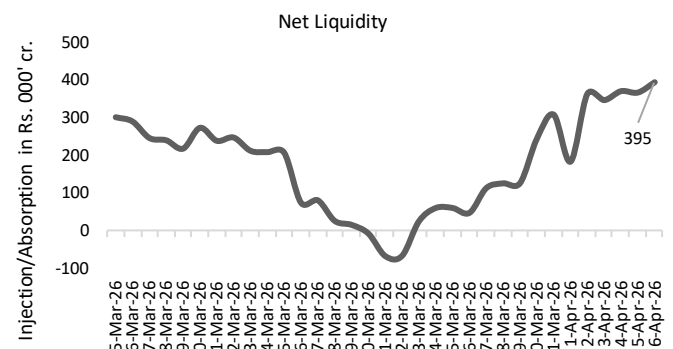
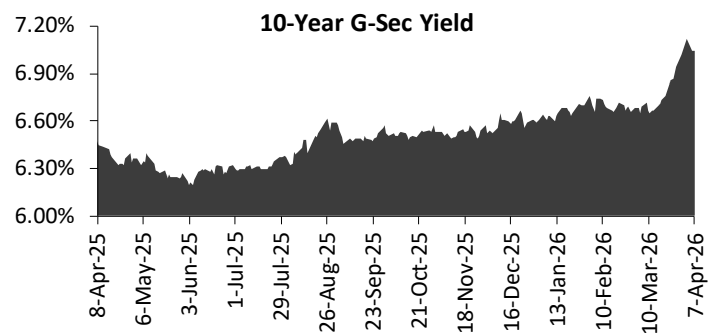
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.61	7.47	8.21	8.26	9.49	9.97
1 Year	6.02	7.62	8.36	8.41	9.64	10.12
3 Year	6.57	7.67	8.41	8.46	9.69	10.17
5 Year	6.76	7.70	8.54	8.59	9.82	10.30
10 Year	7.04	7.77	8.61	8.66	9.89	10.37

Rs. Cr (Debt)	FII Inv 6 Apr	MF Inv 2 Apr
Buy	443	15,453
Sell	1,631	9,507
Net	-1,187	5,946
Net (MTD)	-1,553	5,978
Net (YTD)	3,854	-308,369

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% (March 15, 2026)		1.68% (Feb 28, 2026)
Bank Deposit Growth*	0.08% (March 15, 2026)		1.58% (Feb 28, 2026)

## Capital markets

- WorkOnGrid raised Rs 22.5 Crore led by Transition Venture Capital with participation from the Indian Angel Network (IAN).
- Kreditbee raised \$280 million, becoming a unicorn with a \$1.5 billion valuation.
- Aria Networks raised \$125 million in its first series funding round, as the startup seeks to develop its AI networking infrastructure of artificial intelligence.
- Minor Hotels on Monday signed a management contract to operate a luxury hotel at the upcoming Rs 2,400-crore World Trade Centre (WTC) in Salt Lake near Kolkata.
- Shemaroo Entertainment acquired the entire content library of OHO Gujarati for its OTT platform ShemarooMe, marking a first-of-its-kind consolidation in the Gujarati OTT space.



Global market indices	7 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46584.46	-0.18	-1.93	0.52	22.70
Nikkei 225	53429.56	0.03	-3.94	4.63	71.60
FTSE	10348.79	-0.84	0.62	1.69	34.36
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	33229.82	2.02	-1.10	4.75	72.78

Global debt	7 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.33	4.34	4.15	4.15	4.30	4.15
UK 10-Year (%)	4.90	4.85	4.63	4.41	4.88	4.62
German 10-Year (%)	3.08	3.00	2.86	2.81	3.01	2.64
Japan 10-Year (%)	2.39	2.42	2.16	2.12	2.35	1.22

Domestic	7 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147786	-0.75	-6.91	0.72	65.89
Silver (Rs / Kg)	230881	-1.35	-11.45	0.32	155.42
Aluminium (Rs / Kg)	357	-0.25	6.80	0.38	53.06
Copper (Rs / kg)	1188	-0.42	-3.55	1.42	46.35
Lead (Rs / kg)	197	-1.47	1.15	0.13	8.73
Zinc (Rs /Kg)	334	1.58	2.11	3.47	31.63
Nickel (Rs / kg)	1634	-0.35	0.95	-0.15	27.26

Global	7 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4656.73	-0.42	-9.58	2.85	53.33
Silver (oz/\$)	7284.00	-0.25	-10.92	3.36	146.16
Brent (\$/bbl)	109.27	-0.46	17.89	-7.67	70.18
NYMEX crude (\$/bbl)	112.95	0.49	24.26	11.41	86.08

## Global markets

- Wall Street stocks closed mixed on Tuesday with Nasdaq gaining on tech resilience amid signs of progress in negotiations between the US and Iran while Dow Jones declined due to losses in industrial stocks.
- 10-year US bond yield ended lower marginally at 4.33% amid uncertainty around geopolitical tensions.
- FTSE index closed lower on Tuesday ahead of US President's looming deadline for Iran to reopen Strait of Hormuz.
- Asian markets were trading mostly higher at 8.30 AM.
- US New orders for manufactured durable goods fell by 1.4% to \$315.5 billion in February of 2026, compared to revised 0.5% drop in January 2026
- US private employers added an average of 26,000 jobs per week in the four weeks ending March 21, 2026, compared to 15,250 weekly jobs created in the previous period.
- US Consumer Inflation Expectations rose to 3.4% in March 2026 compared to 3% in February 2026.
- Eurozone S&P Global Services PMI eased to 50.2 in March 2026 compared to 51.9 in February 2026 while the S&P Global Composite PMI edged up to 50.7 from 51.9.
- UK S&P Global Services PMI edged lower to 50.5 in March 2026 compared to 53.9 in February 2026 while the S&P Global UK Composite PMI fell to 50.3 from 53.7.

## Commodity

- Crude oil prices rose by 55 cents to \$112.95 a barrel on the NYMEX due to strong refinery demand ahead of US President's deadline to Iran.
- Domestic gold prices declined due to hopes over de-escalation of geopolitical tensions.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
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
Apr 15	India Inflation Rate, Mar	3.21%
Apr 16	Eurozone Inflation Rate Final, Mar	1.9%

**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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