

# Daily Market Monitor

April 09, 2026

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	8 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23997	3.78	-1.85	7.46	6.49
BSE Sensex	77563	3.95	-1.72	7.80	4.49
BSE 100	25198	3.83	-1.81	7.65	6.85
BSE 200	10939	3.91	-1.81	7.71	7.51
BSE 500	34691	3.88	-1.54	7.79	7.62
BSE SmallCap	47533	3.92	1.39	9.98	5.79
BSE MidCap	43761	4.09	-0.84	7.95	9.85
BSE LargeCap	9289	3.88	-2.02	7.65	7.11
Sectoral indices					
BSE IT	30394	0.78	4.02	8.84	-6.99
BSE Oil & Gas	26547	3.87	-5.73	3.86	9.90
BSE FMCG	17627	1.63	-3.56	5.09	-10.30
BSE Auto	57355	6.55	-4.14	9.01	27.13
BSE Bankex	62702	5.72	-3.52	10.82	8.13
BSE Teck	15781	1.12	2.19	7.15	-2.42
BSE Capital Goods	69442	3.06	-1.67	8.09	19.16
BSE Consumer Durable	57258	5.15	-0.22	8.82	7.31

Turnover (Rs Cr)	8 Apr	7 Apr
BSE Cash	12223	6474
NSE Cash	165926	110462
NSE F&O	8523168	64710618

Rs. Cr (Equity)	FII Inv 7 Apr	MF Inv 2 Apr	DII Inv 8 Apr
Buy	9,344	13,801	29,003
Sell	16,154	10,116	24,835
Net	-6,810	3,684	4,168
Net (MTD)	-44,753	9,766	34,617
Net (YTD)	-173,611	161,306	278,172

	8 Apr	1Day	Month ago	Year ago
USD	92.56	92.96	91.68	85.91
GBP	124.30	123.08	122.49	109.87
Euro	108.20	107.26	106.41	94.30
100 Yen	58.49	58.18	58.08	58.25

## Indian markets

- Indian equity benchmarks closed higher on Wednesday, boosted by the temporary easing of geopolitical tensions in West Asia as well as a significant decline in crude oil prices.
- The top gainers were Shriram Finance, Tata Motors Passenger Vehicles, Adani Enterprises, Eicher Motors and InterGlobe Aviation, up 8.09-10.14%.
- The top losers were Coal India, Tech Mahindra, Nestle India, Wipro and Sun Pharmaceutical Industries, down 0.29-3.02%.

## Indian debt

- The interbank call-money rate ended higher at 4.75% on Wednesday compared to 4.70% on Tuesday.
- Government bond prices ended higher on Wednesday following a two-week US-Iran truce aimed at reopening the Strait of Hormuz.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.90% on Wednesday compared to 7.05% on Tuesday.

## Indian Rupee

- The rupee ended higher vs the dollar on Wednesday, supported by a plunge in crude oil prices following the announcement of a ceasefire in the conflict in West Asia.

## Regulatory

- The Reserve Bank of India to remove the NPA-provisioning condition for including quarterly profits in capital calculations.
- RBI to dispense with IFR requirements for commercial banks and streamline norms for others.
- RBI will rationalise and simplify the list of items required to be placed before bank Boards.
- RBI has consolidated all supervisory guidelines into 64 Master Directions for easier compliance.
- RBI will remove the due-diligence requirement for MSMEs to simplify onboarding on TReDS platforms.
- RBI expands participation to non-bank entities and enhances borrowing limits for primary dealers to deepen the term money market.

## Economy and Government

- The Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) voted unanimously to keep the repo rate unchanged at 5.25%.
- Accordingly, the standing deposit facility rate stays pat at 5.00%, while the marginal standing facility rate and the bank rate are unchanged at 5.50%.
- The RBI has projected India's real gross domestic product growth for fiscal 2027 at 6.9%, with 6.8%, 6.7%, 7.0% and 7.2% for quarters one, two, three and four, respectively.
- The RBI revised its inflation projection for this fiscal to 4.6%, with quarterly Consumer Price Index inflation projected at 4.0% for the first quarter, 4.4% for the second, 5.2% for the third and 4.7% for the fourth.
- The Cabinet Committee on Economic Affairs (CCEA) approved an investment of Rs 40,000 crore to set up two hydropower plants in Arunachal Pradesh.

## Domestic Debt Market Indicators

Instrument	8 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.75%	4.70%	5.15%	5.40%	7.00%	5.60%
3-Month T-Bill	5.29%	5.36%	5.31%	5.30%	5.40%	6.05%
6-Month T-Bill	5.50%	5.61%	5.51%	5.49%	5.51%	6.15%
1-year T-Bill	5.62%	5.64%	5.60%	5.56%	5.70%	6.17%
3-Month CD	6.50%	7.00%	7.10%	6.50%	7.35%	6.53%
6-Month CD	7.02%	7.20%	7.05%	6.78%	7.30%	6.87%
1-year CD	7.15%	7.35%	6.94%	6.85%	7.25%	6.98%
3-Month CP	6.90%	7.40%	7.60%	6.80%	7.75%	6.86%
6-Month CP	7.37%	7.60%	7.55%	7.10%	7.65%	7.19%
1-year CP	7.50%	7.75%	7.27%	7.17%	7.60%	7.27%
1-year Gilt	5.78%	6.02%	5.65%	5.66%	5.82%	6.26%
3-year Gilt	6.37%	6.57%	6.00%	5.91%	6.43%	6.28%
5-year Gilt	6.50%	6.76%	6.34%	6.35%	6.90%	6.32%
1-year AAA	7.47%	7.62%	7.13%	7.00%	7.57%	7.10%
3-year AAA	7.52%	7.67%	7.23%	7.00%	7.59%	7.06%
5-year AAA	7.60%	7.70%	7.28%	7.21%	7.67%	7.06%
10-year G-sec	6.91%	7.04%	6.69%	6.63%	7.02%	6.47%
Net LAF (Rs Cr)	401802	395331	290993	-19310	245161	132865
Forex reserves (\$ bn)	688.06	698.35	728.49	696.61	642.49	665.40

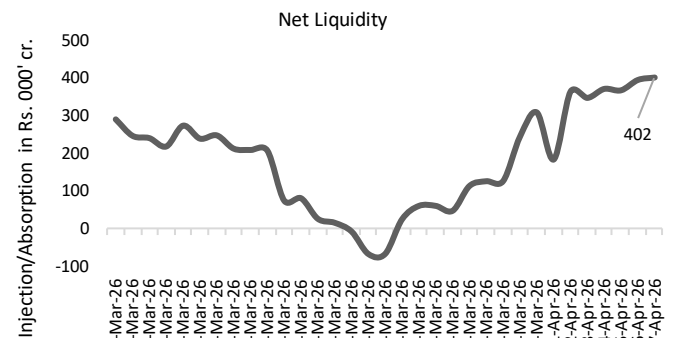
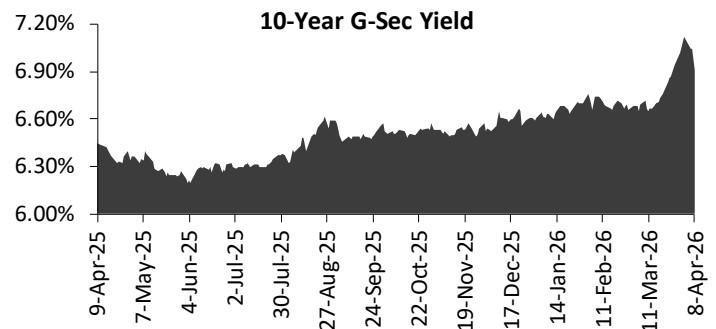
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	7.29	8.03	8.08	9.31	9.79
1 Year	5.78	7.47	8.21	8.26	9.49	9.97
3 Year	6.37	7.52	8.26	8.31	9.54	10.02
5 Year	6.50	7.60	8.44	8.49	9.72	10.20
10 Year	6.91	7.67	8.51	8.56	9.79	10.27

Rs. Cr (Debt)	FII Inv 7 Apr	MF Inv 2 Apr
Buy	199	15,453
Sell	1,215	9,507
Net	-1,016	5,946
Net (MTD)	-2,570	5,978
Net (YTD)	2,837	-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

- MUFG Bank acquired 20% stake in Shriram Finance Ltd (SFL) for Rs 39,618 crore.
- Cyient Semiconductors acquired a 74% stake in US-based Kinetic Technologies for \$85 million.
- Adani Group committed Rs 33,081 crore to Odisha for three major infrastructure projects: a data center, a thermal power plant, and a cement manufacturing unit.
- Royal Orchid Hotels has entered into a strategic alliance with Hilton to develop and open 125 Hampton by Hilton hotels throughout India.



Global market indices	8 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47909.92	2.85	0.86	3.38	27.27
Nikkei 225	56308.42	5.39	1.24	10.27	70.57
FTSE	10608.88	2.51	3.15	4.25	34.11
Hang Seng	25893.02	3.09	0.53	4.46	28.64
Taiwan	34761.38	4.61	3.46	9.58	88.31

Global debt	8 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.33	4.15	4.19	4.30	4.26
UK 10-Year (%)	4.71	4.90	4.63	4.40	4.88	4.61
German 10-Year (%)	2.94	3.08	2.86	2.83	3.01	2.62
Japan 10-Year (%)	2.37	2.39	2.16	2.09	2.35	1.27

Domestic	8 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	151121	2.26	-4.81	2.99	70.66
Silver (Rs / Kg)	244041	5.70	-6.40	6.04	170.07
Aluminium (Rs / Kg)	355	-0.39	6.38	-0.01	51.58
Copper (Rs / kg)	1205	1.43	-2.16	2.87	48.36
Lead (Rs / kg)	198	0.15	1.31	0.28	10.23
Zinc (Rs /Kg)	335	0.24	2.35	3.72	32.57
Nickel (Rs / kg)	1643	0.56	1.51	0.41	27.99

Global	8 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4660.31	0.08	-9.51	2.93	57.06
Silver (oz/\$)	7189.00	-1.30	-12.08	2.02	141.40
Brent (\$/bbl)	94.75	-13.29	2.22	-19.94	50.83
NYMEX crude (\$/bbl)	94.41	-16.41	3.86	-6.88	58.46

## Global markets

- Wall Street stocks closed higher on Wednesday after two-week ceasefire between Washington and Tehran eased fears over oil supply and inflation.
- 10-year US bond yield ended lower at 4.29% following announcement over US-Iran war ceasefire.
- FTSE index closed higher on Wednesday driven by US-Iran ceasefire deal, plunging oil prices.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone producer prices fell by 3% in February 2026, compared to the upwardly revised 2% in January 2026.
- Eurozone retail trade expanded by 1.7% year-on-year in February 2026, marking a slowdown from the 2.1% growth recorded in January.
- Eurozone S&P Global Construction PMI dropped to 44.6 in March 2026 from 46.0 in February.
- UK Halifax House Price Index increased by 0.8% in March 2026, down from the revised 1.2% annual growth recorded in February.

## Commodity

- Crude oil prices fell by \$18.54 to \$94.41 a barrel on the NYMEX as the announcement of a US-Iran's two-week ceasefire sparked hopes the Strait of Hormuz could reopen, easing supply fears.
- Domestic gold prices rose due to weakness in dollar index.

## 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%	7.80%	7.40%	7.40%	6.40%	6.40%	6.40%	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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