Daily Market Monitor

April 10, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	9 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23775	-0.93	-1.05	6.46	6.14
BSE Sensex	76632	-1.20	-1.20	6.51	3.77
BSE 100	25006	-0.76	-0.73	6.83	6.59
BSE 200	10873	-0.60	-0.55	7.06	7.45
BSE 500	34522	-0.49	-0.10	7.27	7.73
BSE SmallCap	47598	0.14	3.97	10.13	7.09
BSE MidCap	43846	0.19	1.50	8.16	10.87
BSE LargeCap	9222	-0.72	-0.88	6.87	6.90
Sectoral indices					
BSE IT	30419	0.08	4.21	8.93	-5.01
BSE Oil & Gas	26461	-0.33	-3.03	3.53	9.94
BSE FMCG	17603	-0.14	-2.24	4.94	-11.76
BSE Auto	57144	-0.37	-0.63	8.61	26.58
BSE Bankex	61711	-1.58	-1.95	9.07	7.35
BSE Teck	15779	-0.01	2.38	7.14	-0.88
BSE Capital Goods	70579	1.64	2.14	9.86	23.14
BSE Consumer Durable	56952	-0.53	1.98	8.23	6.40

Turnover (Rs Cr)	9 Apr	8 Apr
BSE Cash	10334	12223
NSE Cash	133364	165926
NSE F&O	8384552	8523168

Rs. Cr (Equity)	FII Inv 8 Apr	MF Inv 7 Apr	DII Inv 9 Apr
Buy	20,152	17,088	15,968
Sell	21,547	11,601	15,012
Net	-1,396	5,487	956
Net (MTD)	-46,149	20,198	35,572
Net (YTD)	-175,006	171,738	279,128

	9 Apr	1Day	Month ago	Year ago
USD	92.71	92.56	92.26	86.62
GBP	124.14	124.30	122.91	111.14
Euro	108.09	108.20	106.59	95.81
100 Yen	58.36	58.49	58.18	59.68

Indian markets

- Indian equity benchmarks ended lower on Thursday, on fading hopes of a durable US-Iran ceasefire and renewed instability in West Asia.
- The top gainers were Hindalco Industries, Bajaj Auto, Bharat Electronics, Dr Reddy's Laboratories, and NTPC, up 1.48% - 3.30.
- The top losers were InterGlobe Aviation, Jio Financial Services, Larsen & Toubro, Shriram Finance, and Eternal, down 2.45% - 3.61%.

Indian debt

- The interbank call-money rate ended higher at 5.10% on Thursday compared to 4.75% on Wednesday.
- Government bond prices ended lower on Thursday as doubt over the US-Iran ceasefire and continuing disruptions in the Strait of Hormuz elevated oil price, reviving inflation and currency concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.96% on Thursday compared to 6.90% on Wednesday.

Indian Rupee

- The rupee closed lower vs the US dollar on Thursday, owing to lingering uncertainties over the ceasefire in West Asia.

Regulatory

- The Reserve Bank of India (RBI) directed banks to streamline their processes for inward cross-border payments to ensure faster customer notification and timely credit to beneficiaries.
- The Securities and Exchange Board of India (Sebi) introduced a mechanism to strengthen compliance with lock-in requirements for pledged shares.
- The Insurance Regulatory and Development Authority of India issued revised information and cyber security guidelines for regulated entities to strengthen the cybersecurity framework for insurers and intermediaries, mandating tighter governance, enhanced board accountability and more frequent risk reviews.

Economy and Government

- The World Bank said risks to India's projected growth of 6.6% for the fiscal year 2026/27 are skewed to the downside even as ample foreign exchange buffers and a well-capitalised banking system help manage risks.
- The World Bank said India is well placed to weather the current global energy shock with ample buffers, including high foreign exchange reserves, fiscal space and low inflation, which will support growth despite global headwinds
- Principal Secretary to the Prime Minister Shaktikanta Das said India has consistently shown remarkable resilience during global crises, not only surviving them but also transforming through the turbulence to emerge stronger.
- Uttarakhand Chief Minister Pushkar Singh Dhami approved a total allocation of Rs 1,200 crore to accelerate infrastructure development for the Kumbh Mela 2027 and to ensure effective implementation of district plans.
- The government increased the allocation of liquefied petroleum gas (LPG) to 70% for industrial units in the pharmaceutical, food, polymer, agriculture, and several other sectors.

Domestic Debt Market Indicators

Instrument	9 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.10%	4.75%	5.07%	5.30%	7.00%	5.60%
3-Month T-Bill	5.26%	5.29%	5.35%	5.30%	5.40%	5.96%
6-Month T-Bill	5.55%	5.50%	5.54%	5.53%	5.51%	6.03%
1-year T-Bill	5.59%	5.62%	5.63%	5.55%	5.70%	6.06%
3-Month CD	6.45%	6.50%	7.22%	6.62%	7.35%	6.53%
6-Month CD	6.85%	7.02%	7.20%	6.85%	7.30%	6.80%
1-year CD	7.00%	7.15%	6.98%	6.87%	7.25%	6.85%
3-Month CP	6.75%	6.90%	7.70%	6.95%	7.75%	6.86%
6-Month CP	7.20%	7.37%	7.60%	7.17%	7.65%	7.15%
1-year CP	7.35%	7.50%	7.30%	7.22%	7.60%	7.27%
1-year Gilt	5.87%	5.78%	5.66%	5.64%	5.82%	6.21%
3-year Gilt	6.40%	6.37%	6.13%	5.91%	6.43%	6.21%
5-year Gilt	6.55%	6.50%	6.44%	6.37%	6.90%	6.26%
1-year AAA	7.42%	7.47%	7.23%	6.98%	7.57%	7.07%
3-year AAA	7.44%	7.52%	7.28%	7.00%	7.59%	7.03%
5-year AAA	7.60%	7.60%	7.35%	7.21%	7.67%	7.03%
10-year G-sec	6.96%	6.91%	6.72%	6.63%	7.02%	6.45%
Net LAF (Rs Cr)	457389	401802	219107	21299	245161	181839
Forex reserves ($ bn)	688.06	698.35	728.49	686.80	642.49	665.40

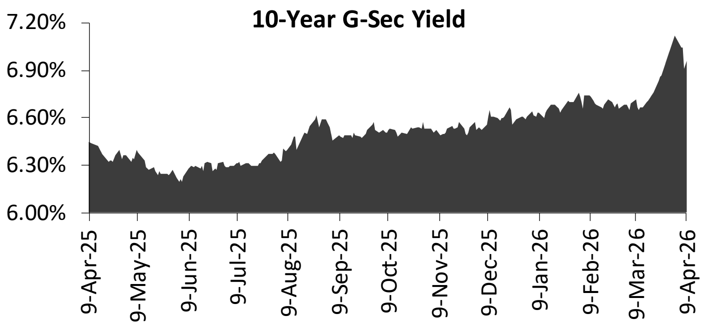
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	7.12	7.86	7.91	9.14	9.62
1 Year	5.87	7.42	8.16	8.21	9.44	9.92
3 Year	6.40	7.44	8.18	8.23	9.46	9.94
5 Year	6.55	7.60	8.44	8.49	9.72	10.20
10 Year	6.96	7.67	8.51	8.56	9.79	10.27

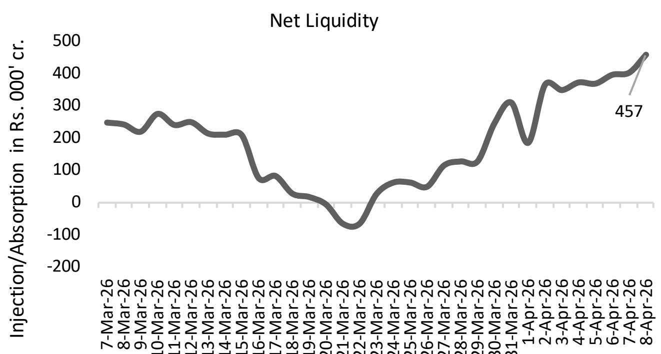
Rs. Cr (Debt)	FII Inv 8 Apr	MF Inv 7 Apr
Buy	111	20,310
Sell	860	19,115
Net	-750	1,195
Net (MTD)	-3,319	12,003
Net (YTD)	2,088	-302,343

EconomicIndicators	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

- CoreWeave entered into an expanded agreement to provide Meta Platforms with $21 billion in cloud capacity, as the social media giant scales its infrastructure to support increasingly complex AI workloads.
- Adani Renewable Energy Middle East Ltd entered a joint venture agreement with Minerva Holding RSC to develop renewable energy projects in India.
- BHEL signed a technology collaboration agreement (TCA) with South Korea's E2S Company to strengthen its capabilities in excitation systems for synchronous machines.
- Sri Lotus Developers & Realty announced the launch of its luxury coastline collection of 11 sea-facing residential projects, with a combined gross development value (GDV) of Rs 8,000 crore.
- The RPG Group company secured new orders of Rs. 2,518 crores across various businesses.
- Whitestone REIT to be acquired by funds managed by Ares Management Corp in an all-cash deal, valuing the U.S. shopping center owner at about $1.7 billion.
- Dalcore plans to invest Rs 500 crore to develop a luxury housing project at Gurugram, in partnership with a global design and lifestyle brand YOO.





Global market indices	9 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	48185.8	0.58	0.93	3.98	18.66
Nikkei 225	55895.32	-0.73	6.01	9.46	76.25
FTSE	10603.48	-0.05	3.45	4.20	38.08
Hang Seng	25752.4	-0.54	1.35	3.89	27.08
Taiwan	34861.16	0.29	8.57	9.89	100.45

Global debt	9 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.29	4.12	4.18	4.30	4.34
UK 10-Year (%)	4.76	4.71	4.67	4.38	4.88	4.79
German 10-Year (%)	3.01	2.94	2.86	2.83	3.01	2.58
Japan 10-Year (%)	2.38	2.37	2.19	2.09	2.35	1.38

Domestic	9 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	149937	-0.78	-5.51	2.18	66.30
Silver (Rs / Kg)	236158	-3.23	-9.19	2.62	160.46
Aluminium (Rs / Kg)	356	0.06	3.54	0.04	53.56
Copper (Rs / kg)	1202	-0.25	-0.50	2.62	48.72
Lead (Rs / kg)	199	0.46	1.04	0.74	9.91
Zinc (Rs /Kg)	333	-0.64	0.96	3.05	33.17
Nickel (Rs / kg)	1642	-0.11	2.03	0.30	28.66

Global	9 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	149937	-0.78	-5.51	2.18	66.30
Silver (oz/$)	236158	-3.23	-9.19	2.62	160.46
Brent ($/bbl)	356	0.06	3.54	0.04	53.56
NYMEX crude ($/bbl)	1202	-0.25	-0.50	2.62	48.72

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%

Global markets

- Wall Street stocks ended higher on Thursday negotiations in Middle East conflicts eased geopolitical concerns.
- 10-year US bond yield ended flat at 4.29% as oil prices rallied and investors digested a number of key data releases.
- FTSE index ended lower on Thursday amid doubts over ceasefire in the Middle East conflict.
- Asian markets were trading mostly higher at 8.30 AM.
- The US economy expanded at an annualized rate of 0.5% in Q4 2025, compared to 4.4% in Q4 2025.
- US PCE price index rose 2.8% year-over-year in February 2026, the same pace as in the previous month.
- US Initial jobless claims rose by 16,000 from the previous week to 219,000 on the period ending April 4th compared to 203,000 in the previous period.
- US PCE Prices increased to 2.9% in the fourth quarter of 2025 compared to 2.8% in the third quarter of 2025.
- China's annual inflation eased to 1.0% in March 2026 from February's over three-year high of 1.3%.
- China's producer prices rose 0.5% year-on-year in March 2026, reversing a 0.9% decline in February.
- Japan's producer prices rose 2.6% yoy in March 2026, quickening from a marginally revised 2.1% increase in the prior month.
- The International Monetary Fund, the World Bank and the World Food Programme said that the war in West Asia has triggered one of the largest disruptions to global energy markets and will inevitably lead to rising food prices and food insecurity.

Commodity

- Crude oil prices rose by $3.46 to $97.87 a barrel on the NYMEX as market struggles to price path for Hormuz reopening and strikes across Gulf raise supply threats despite ceasefire.
- Domestic gold prices declined due to hopes over de-escalation of geopolitical tensions.

Forthcoming results

NA	NA

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%