

Daily Market Monitor

April 13, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	10 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24051	1.16	-0.87	7.70	7.37
BSE Sensex	77550	1.20	-0.84	7.79	5.01
BSE 100	25321	1.26	-0.63	8.18	7.94
BSE 200	11021	1.36	-0.39	8.51	8.91
BSE 500	35005	1.40	0.00	8.77	9.24
BSE SmallCap	48445	1.78	3.55	12.09	9.00
BSE MidCap	44566	1.64	1.52	9.94	12.69
BSE LargeCap	9348	1.36	-9.81	8.33	8.36
Sectoral indices					
BSE IT	29902	-1.70	2.69	7.08	-6.62
BSE Oil & Gas	26681	0.83	-2.01	4.39	10.86
BSE FMCG	17831	1.30	-1.97	6.30	-10.61
BSE Auto	58714	2.75	-0.80	11.59	30.06
BSE Bankex	62985	2.06	-1.63	11.32	9.56
BSE Teck	15606	-1.10	1.81	5.96	-1.97
BSE Capital Goods	72181	2.27	3.04	12.36	25.94
BSE Consumer Durable	58203	2.20	1.58	10.61	8.74

Turnover (Rs Cr)	10 Apr	9 Apr
BSE Cash	8813	10334
NSE Cash	131731	133364
NSE F&O	15444101	8384552

Rs. Cr (Equity)	FII Inv 9 Apr	MF Inv 7 Apr	DII Inv 10 Apr
Buy	16,522	17,088	15,982
Sell	18,586	11,601	15,572
Net	-2,064	5,487	410
Net (MTD)	-48,213	20,198	35,983
Net (YTD)	-177,070	171,738	279,538

	10 Apr	1Day	Month ago	Year ago
USD	92.65	92.71	92.02	86.62
GBP	124.31	124.14	123.70	111.14
Euro	108.28	108.09	107.00	95.81
100 Yen	58.16	58.36	58.40	59.68

Indian markets

- Indian equity benchmarks closed higher on Friday, driven by gains in financial and auto stocks amid easing geopolitical concerns and moderating oil prices.
- The top gainers were Asian Paints, Eicher Motors, Bajaj Auto, ICICI Bank and Mahindra & Mahindra, up 3.13-3.81%.
- The top losers were Coal India, Sun Pharmaceuticals, Infosys, TCS and Tech Mahindra, down, 1.55-4.14%.

Indian debt

- The interbank call-money rate ended lower at 4.75% on Friday compared to 5.10% on Thursday.
- Government bond prices ended higher on Friday as a US-Iran truce cooled oil prices and a neutral RBI stance.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.91% on Friday compared to 6.96% on Thursday.

Indian Rupee

- The rupee closed higher against the United States (US) dollar on Friday, supported by softer oil prices and steady sentiment ahead of the Reserve Bank of India's policy decision.

Regulatory

- The Reserve Bank proposed changes in the criteria for identifying upper layer non-banking finance companies (NBFCs), pitching for an asset-size-based approach as against the earlier parametric system and inclusion of state-run entities.
- The Reserve Bank of India (RBI) proposed to introduce delays in high-value digital transactions as part of wider measures to combat rising fraud.
- The Reserve Bank of India to conduct a variable rate reverse repo auction for Rs 2 trillion (\$21.58 billion), its first such operation in four months.
- The Securities and Exchange Board of India eased AIF closure rules, allowing funds to retain liquidation proceeds under conditions as Rs 180 crore remains locked due to litigation, tax and operational issues.

Economy and Government

- According to data released by the Reserve Bank of India, India Foreign Exchange Reserves increased to \$697.12 billion in April 3 compared to \$688.06 billion in the previous week.
- India's economic growth forecast for FY27 has been raised to 6.9% by the Asian Development Bank.
- According to a report by Crisil Intelligence power demand in the country is expected to rise by around 6% in the current financial year, driven by the anticipated impact of El Nino conditions, which are likely to increase temperatures and reduce rainfall.
- The government approved 52 new applications under the third round of the Production Linked Incentive (PLI) Scheme for textiles.

Domestic Debt Market Indicators

Instrument	10 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.75%	5.10%	4.75%	5.30%	7.00%	5.60%
3-Month T-Bill	5.26%	5.26%	5.34%	5.30%	5.40%	5.96%
6-Month T-Bill	5.55%	5.55%	5.52%	5.53%	5.51%	6.03%
1-year T-Bill	5.59%	5.59%	5.60%	5.55%	5.70%	6.06%
3-Month CD	6.15%	6.45%	7.17%	6.62%	7.35%	6.53%
6-Month CD	6.80%	6.85%	7.20%	6.85%	7.30%	6.80%
1-year CD	7.00%	7.00%	6.98%	6.87%	7.25%	6.85%
3-Month CP	6.51%	6.75%	7.65%	6.95%	7.75%	6.86%
6-Month CP	7.15%	7.20%	7.70%	7.17%	7.65%	7.15%
1-year CP	7.35%	7.35%	7.30%	7.22%	7.60%	7.27%
1-year Gilt	5.86%	5.87%	5.67%	5.64%	5.82%	6.21%
3-year Gilt	6.35%	6.40%	6.03%	5.91%	6.43%	6.21%
5-year Gilt	6.53%	6.55%	6.38%	6.37%	6.90%	6.26%
1-year AAA	7.37%	7.42%	7.19%	6.98%	7.57%	7.07%
3-year AAA	7.44%	7.44%	7.24%	7.00%	7.59%	7.03%
5-year AAA	7.60%	7.60%	7.31%	7.21%	7.67%	7.03%
10-year G-sec	6.92%	6.96%	6.67%	6.63%	7.02%	6.45%
Net LAF (Rs Cr)	454534	457389	274311	21299	245161	181839
Forex reserves (\$ bn)	697.12	688.06	728.49	686.80	642.49	665.40

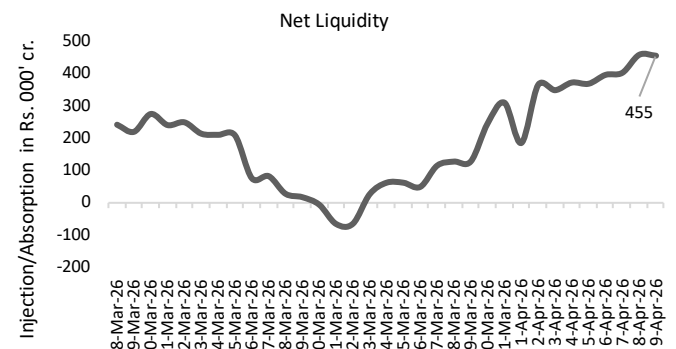
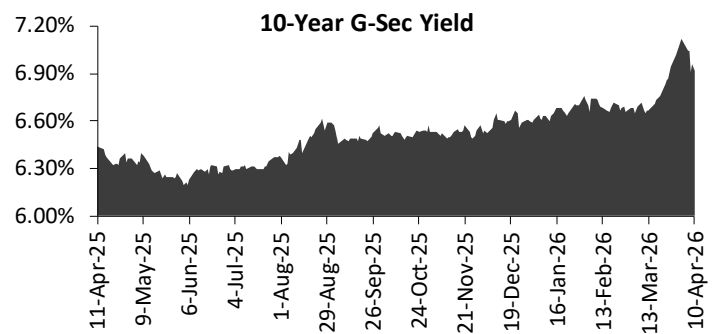
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	7.07	7.81	7.86	9.09	9.57
1 Year	5.86	7.37	8.11	8.16	9.39	9.87
3 Year	6.35	7.44	8.18	8.23	9.46	9.94
5 Year	6.53	7.60	8.44	8.49	9.72	10.20
10 Year	6.92	7.67	8.51	8.56	9.79	10.27

Rs. Cr (Debt)	FII Inv 9 Apr	MF Inv 7 Apr
Buy	337	20,310
Sell	1,286	19,115
Net	-949	1,195
Net (MTD)	-4,268	12,003
Net (YTD)	1,139	-302,343

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	53.9 (Mar-26)	55.0 (Dec-25)	58.1 (Mar-25)
India Service PMI	57.5 (Mar-26)	58.0 (Dec-25)	58.5 (Mar-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

- Enviro Infra Engineers received two projects worth Rs 972.2 crore from the Swachh Maharashtra Mission Directorate.
- Advait Energy Transitions received bid confirmation at the L1 stage as the successful bidder for a turnkey contract under the Vanbandhu Kalyan Yojana-2 (VKY-2) scheme.
- Vedanta Ltd inked pacts with two companies for setting up aluminium-based manufacturing units within its upcoming aluminium park at Jharsuguda in Odisha.
- Power Mech Projects Limited (PMPL) secured an operations and maintenance (O&M) contract from Maha Mumbai Metro Operation Corporation Limited (MMMOCL) for the Mumbai Monorail, valued at Rs 296 crore excluding goods and services tax (GST).



Global market indices	10 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47916.57	-0.56	0.44	3.40	21.02
Nikkei 225	56924.11	1.84	4.93	11.48	64.48
FTSE	10600.53	-0.03	1.81	4.17	33.96
Hang Seng	25893.54	0.55	-0.26	4.46	25.20
Taiwan	35417.83	1.60	8.07	11.65	86.41

Global debt	10 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.31	4.29	4.15	4.18	4.30	4.40
UK 10-Year (%)	4.84	4.76	4.54	4.38	4.88	4.65
German 10-Year (%)	3.05	3.01	2.85	2.83	3.01	2.58
Japan 10-Year (%)	2.45	2.38	2.19	2.09	2.35	1.34

Domestic	10 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	150327	0.26	-6.16	2.45	66.73
Silver (Rs / Kg)	239934	1.60	-11.45	4.26	164.63
Aluminium (Rs / Kg)	357	0.31	6.54	0.35	54.04
Copper (Rs / kg)	1214	1.00	-1.79	3.64	50.20
Lead (Rs / kg)	199	0.38	2.23	1.12	10.32
Zinc (Rs /Kg)	335	0.56	1.30	3.62	33.91
Nickel (Rs / kg)	1642	0.00	1.21	0.30	28.66

Global	10 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4792.96	0.87	-5.94	5.86	55.49
Silver (oz/\$)	7625.00	1.22	-9.43	8.20	149.26
Brent (\$/bbl)	95.20	-0.75	8.43	-19.56	50.32
NYMEX crude (\$/bbl)	96.57	-1.33	15.72	-4.74	60.76

Global markets

- Wall Street stocks closed mixed on Friday with Dow Jones declining due to losses in energy and industrial stocks while Nasdaq gained on strength in tech stocks and resilient growth expectations.
- 10-year US bond yield ended higher at 4.31% after the latest inflation print showed core prices rising less than feared, given the surge in energy prices from the Iran war.
- FTSE index closed flat on Friday as investors stayed cautious ahead of peace talks despite a ceasefire decision between US-Iran.
- Asian markets were trading mostly higher at 8.30 AM.
- US annual inflation rate jumped to 3.3% in March 2026, compared to 2.4% in both February and January 2026 while the annual core inflation rate rose to 2.6% from 2.5%.
- According to a report by S&P Global, global economic growth is expected to slow to 3.2% in calendar year 2026 from 3.4% in the previous year, as the ongoing West Asia conflict triggers what is being described as the largest energy shock on record.

Commodity

- Crude oil prices fell by \$1.30 to \$96.57 a barrel on the NYMEX as a US-Iran ceasefire and upcoming talks for a permanent deal eased supply fears.
- Domestic gold prices rose due to concerns over the stability of geopolitical tensions.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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%
Apr 20	Japan Balance of Trade, Mar	¥57.3B

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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