

Daily Market Monitor

April 17, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	16 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24197	-0.14	3.37	8.35	3.24
BSE Sensex	77989	-0.16	3.29	8.40	1.23
BSE 100	25552	0.08	4.16	9.17	4.06
BSE 200	11143	0.15	4.71	9.72	5.01
BSE 500	35486	0.26	5.38	10.27	5.39
BSE SmallCap	50095	1.06	11.40	15.91	5.03
BSE MidCap	45559	0.65	8.69	12.39	9.13
BSE LargeCap	9437	0.09	4.11	9.36	4.44
Sectoral indices					
BSE IT	30676	1.00	9.22	9.85	-6.67
BSE Oil & Gas	26861	-0.24	2.34	5.09	5.93
BSE FMCG	17923	0.22	1.04	6.85	-12.29
BSE Auto	58278	-0.22	6.86	10.77	22.87
BSE Bankex	63202	-0.32	3.41	11.70	4.06
BSE Teck	15759	0.29	6.51	7.00	-4.31
BSE Capital Goods	74480	1.02	11.15	15.93	22.79
BSE Consumer Durable	59689	0.30	8.29	13.44	5.24

Turnover (Rs Cr)	16 Apr	15 Apr
BSE Cash	11434	9537
NSE Cash	152709	145330
NSE F&O	8087641	6924443

Rs. Cr (Equity)	FII Inv 15 Apr	MF Inv 7 Apr	DII Inv 16 Apr
Buy	20,106	17,088	16,538
Sell	17,007	11,601	19,966
Net	3,099	5,487	-3,428
Net (MTD)	-45,040	20,198	34,418
Net (YTD)	-173,898	171,738	277,974

	16 Apr	1Day	Month ago	Year ago
USD	93.34	93.39	92.40	85.65
GBP	126.63	126.69	122.37	113.66
Euro	110.10	110.12	105.59	97.37
100 Yen	58.74	58.76	57.99	60.18

Indian markets

- Indian equity benchmarks closed lower on Thursday because of profit booking amid caution over potential negotiations to end the conflict in West Asia and ahead of quarterly earnings announcements.
- The top gainers were Adani Enterprises, Hindalco Industries, Trent, Eternal, and Adani Ports and Special Economic Zone, up 2.20-3.06%.
- The top losers were HDFC Bank, Oil and Natural Gas Corporation, HDFC Life Insurance Company, Titan Company and Mahindra & Mahindra, down 1.12-1.96%.

Indian debt

- The interbank call-money rate ended higher at 5.10% on Thursday compared to 5.08% on Wednesday.
- Government bond prices ended lower on Thursday due to uncertainty over US-Iran talks and as caution ahead of fresh debt supply weighed on sentiment.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.89% on Thursday compared to 6.87% on Wednesday.

Indian Rupee

- The rupee ended higher against the US dollar on Thursday, as optimism over a potential deal to end the West Asia conflict kept oil prices subdued.

Regulatory

- The Reserve Bank of India will conduct a 7-day variable rate reverse repo (VRRR) on Friday for a notified amount of Rs 2 lakh crore.
- The Reserve Bank of India (RBI) permitted non-banking financial companies (NBFCs) to open branches without seeking prior approval from the central bank, unless specifically restricted.
- Sebi has extended the registration validity for not-for-profit organisations on the Social Stock Exchange, allowing their enrolment as NPOs for three years without raising funds, and lowered the minimum subscription requirement for issuing Zero Coupon Zero Principal Instruments (ZCZP).
- SEBI has permitted issuers to increase or decrease IPO size by up to 50% without refiling their Draft Red Herring Prospectus (DRHP), easing the previous 20% limit. This temporary relaxation, valid until September 30, 2026.

Economy and Government

- The Ministry of Coal will launch the 15th round of commercial coal mine auctions on April 17 in Mumbai.
- The government introduced three key bills in the Lok Sabha to move ahead with women's reservation and the next delimitation exercise.
- The government released the guidelines for the Urban Challenge Fund (UCF) and plans to start releasing funds to support projects soon.
- The Uttar Pradesh government is looking to invest over Rs 2,900 crore to foster planned urban development in smaller cities and towns.

Domestic Debt Market Indicators

Instrument	16 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.10%	5.08%	5.31%	5.40%	7.00%	5.75%
3-Month T-Bill	5.17%	5.20%	5.34%	5.36%	5.40%	5.93%
6-Month T-Bill	5.45%	5.48%	5.51%	5.60%	5.51%	5.98%
1-year T-Bill	5.55%	5.57%	5.59%	5.60%	5.70%	6.01%
3-Month CD	6.08%	6.08%	7.36%	6.85%	7.35%	6.47%
6-Month CD	6.70%	6.67%	7.48%	7.03%	7.30%	6.74%
1-year CD	6.90%	6.92%	7.20%	7.03%	7.25%	6.78%
3-Month CP	6.42%	6.45%	7.67%	7.15%	7.75%	6.77%
6-Month CP	7.07%	7.07%	7.85%	7.25%	7.65%	7.08%
1-year CP	7.27%	7.30%	7.55%	7.33%	7.60%	7.14%
1-year Gilt	5.85%	5.80%	5.76%	5.71%	5.82%	6.05%
3-year Gilt	6.30%	6.32%	6.10%	5.91%	6.43%	6.09%
5-year Gilt	6.57%	6.53%	6.44%	6.47%	6.90%	6.12%
1-year AAA	7.22%	7.31%	7.37%	7.13%	7.57%	7.03%
3-year AAA	7.43%	7.39%	7.38%	7.14%	7.59%	7.03%
5-year AAA	7.55%	7.51%	7.42%	7.29%	7.67%	7.03%
10-year G-sec	6.89%	6.88%	6.70%	6.68%	7.02%	6.39%
Net LAF (Rs Cr)	521472	513352	75484	121502	245161	169845
Forex reserves (\$ bn)	697.12	688.06	716.81	687.19	642.49	676.27

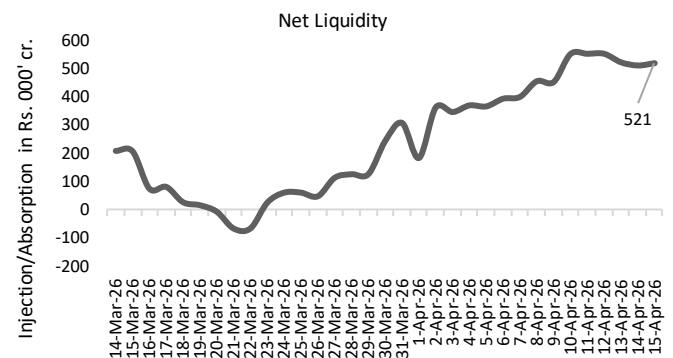
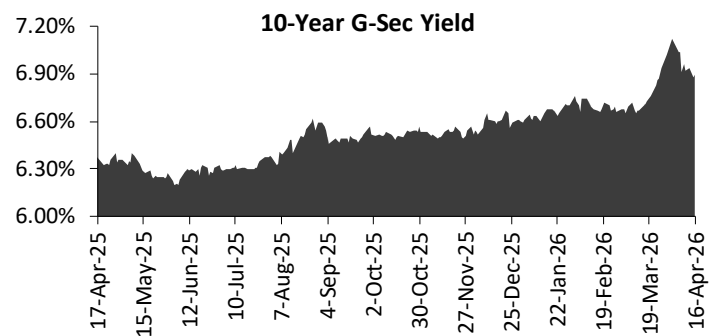
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	6.89	7.63	7.68	8.91	9.39
1 Year	5.85	7.22	7.96	8.01	9.24	9.72
3 Year	6.30	7.43	8.17	8.22	9.45	9.93
5 Year	6.57	7.55	8.39	8.44	9.67	10.15
10 Year	6.89	7.62	8.46	8.51	9.74	10.22

Rs. Cr (Debt)	FII Inv 15 Apr	MF Inv 7 Apr
Buy	412	20,310
Sell	717	19,115
Net	-305	1,195
Net (MTD)	-6,246	12,003
Net (YTD)	-840	-302,343

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.40% (Mar'26)	1.33% (Dec'25)	3.34% (Mar'25)
WPI	3.88% (Mar'26)	0.83% (Dec'25)	2.25% (Mar'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

- Rail Vikas Nigam emerged as the lowest bidder for an East Coast Railway order worth Rs 968 crore.
- Bharat PetroResources Ltd (BPRL) would invest around \$2.8 billion in a Brazil-based oil and gas project.
- Moschip Technologies plans to acquire a 73% controlling stake in Vayavya Labs for about Rs 245 crore in a cash and equity deal.
- Wipro announced a share buyback worth Rs 15,000 crore.
- NG Electro Products raised Rs 150 crore from JM Financial Private Equity.
- Sowparnika Projects plans to raise Rs 500 crore for expansion, aiming to develop 5.5 million sq ft across South India over the next two years.



Global market indices	16 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	48578.72	0.24	3.48	4.83	22.46
Nikkei 225	59518.34	2.38	10.73	16.56	75.46
FTSE	10589.99	0.29	2.64	4.06	27.97
Hang Seng	26394.26	1.72	2.17	6.48	25.35
Taiwan	37132.02	1.12	11.37	17.05	90.73

Global debt	16 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.32	4.29	4.23	4.24	4.30	4.29
UK 10-Year (%)	4.88	4.82	4.77	4.40	4.88	4.61
German 10-Year (%)	3.03	3.05	2.95	2.84	3.01	2.50
Japan 10-Year (%)	2.41	2.41	2.28	2.18	2.35	1.29

Domestic	16 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	153106	0.16	-1.67	4.34	61.88
Silver (Rs / Kg)	251292	0.91	1.04	9.19	160.20
Aluminium (Rs / Kg)	375	2.32	8.60	5.53	61.60
Copper (Rs / kg)	1275	0.77	6.74	8.90	52.76
Lead (Rs / kg)	202	1.95	4.13	2.21	10.11
Zinc (Rs /Kg)	345	1.29	6.09	6.78	37.11
Nickel (Rs / kg)	1734	0.57	6.77	5.96	28.26

Global	16 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4801.53	-0.50	-4.34	6.05	49.01
Silver (oz/\$)	7948.00	0.10	-2.41	12.79	145.99
Brent (\$/bbl)	99.39	4.70	-0.82	-16.02	50.93
NYMEX crude (\$/bbl)	94.69	3.72	1.27	-6.60	51.58

Global markets

- Wall Street stocks ended higher on Thursday as a ceasefire agreement between Israel and Lebanon eased worries over Middle East conflicts.
- 10-year US bond yield ended higher at 4.32% as investors assessed jobless claims numbers and concerns over Federal Reserve's independency.
- FTSE index ended higher on Thursday lifted by energy stocks, as doubts about lasting resolution in the Middle East sent oil prices higher.
- Asian markets were trading mostly lower at 8.30 AM.
- The number of people claiming for unemployment benefits in the US fell to 207,000 in the week ended April 11th 2026 from a downwardly revised 218,00 in the previous week which was the highest value since early February.
- US industrial production increased 0.7% year-on-year in March 2026, the least since June last year, following a downwardly revised 1.2% rise in February.
- US manufacturing production increased 0.5% year-on-year in March 2026, the smallest gain since June 2025, following a downwardly revised 1.1% rise in February.
- Eurozone annual inflation rate edged up to 2.6% in March 2026 compared to 1.9% in February 2026 annual core inflation rate eased to 2.3% from 2.4%.
- The UK posted a trade deficit of £0.72 billion in February 2026 compared to a downwardly revised surplus of £3.02 billion in the previous month, as exports fell while imports rose.
- The United Kingdom GDP expanded 1% year-on-year in February 2026, compared to a downwardly revised 0.7% expansion in January 2026.
- UK construction output dropped 1.0% year-on-year in February 2026, compared to a revised 1.9% decline in January 2026.
- UK Industrial Production decreased 0.4% in February 2026 compared to an upwardly revised 0.5% rise in January 2026.

Commodity

- Crude oil prices rose by \$3.40 to \$94.69 a barrel on the NYMEX on skepticism that forthcoming peace talks between the US and Iran would be able to resolve disruptions to Middle Eastern energy supplies caused by the ongoing war.
- Domestic gold prices ended higher due to weak dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Apr 21	Japan Balance of Trade, Mar	¥57.3B
Apr 22	UK Inflation Rate, Mar	3%
Apr 23	Japan Inflation Rate, Mar	1.3%
Apr 27	China Industrial Profits (YTD), Mar	15.2%
Apr 28	India Industrial Production, Mar	5.2%

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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