

Daily Market Monitor

April 20, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	17 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24354	0.65	3.28	9.06	2.10
BSE Sensex	78494	0.65	3.18	9.10	-0.08
BSE 100	25755	0.80	4.19	10.03	3.29
BSE 200	11238	0.85	4.75	10.66	4.41
BSE 500	35820	0.94	5.54	11.30	5.01
BSE SmallCap	50799	1.40	12.14	17.54	5.95
BSE MidCap	46125	1.24	8.99	13.78	9.87
BSE LargeCap	9511	0.79	4.13	10.22	3.63
Sectoral indices					
BSE IT	30697	0.07	10.26	9.92	-6.83
BSE Oil & Gas	27145	1.06	3.30	6.20	6.01
BSE FMCG	18384	2.57	4.25	9.59	-10.58
BSE Auto	58444	0.28	5.01	11.08	21.99
BSE Bankex	63718	0.82	3.33	12.61	2.29
BSE Teck	15768	0.06	6.48	7.07	-5.38
BSE Capital Goods	76112	2.19	12.02	18.47	24.55
BSE Consumer Durable	60330	1.07	8.68	14.65	5.62

Turnover (Rs Cr)	17 Apr	16 Apr
BSE Cash	10101	11434
NSE Cash	151705	152709
NSE F&O	12163212	8087641

Rs. Cr (Equity)	FII Inv 16 Apr	MF Inv 7 Apr	DII Inv 17 Apr
Buy	16,756	17,088	17,514
Sell	15,135	11,601	22,235
Net	1,621	5,487	-4,721
Net (MTD)	-43,419	20,198	29,697
Net (YTD)	-172,276	171,738	273,252

	17 Apr	1Day	Month ago	Year ago
USD	92.72	93.34	92.46	85.57
GBP	125.27	126.63	122.83	113.20
Euro	109.20	110.10	106.10	97.26
100 Yen	58.14	58.74	57.99	59.96

Indian markets

- Indian equity benchmarks closed higher on Friday, buoyed by growing market optimism around a potential near-term resolution of escalating Iran-US tensions and renewed foreign fund inflows.
- The top gainers were Hindustan Unilever, JSW Steel, Nestle India, Apollo Hospitals Enterprise and Power Grid Corporation of India, up 1.89-4.72%.
- The top losers were Wipro, HDFC Life Insurance Company, Sun Pharmaceutical Industries, Bajaj Auto and Mahindra & Mahindra, down 0.63-2.83%.

Indian debt

- The interbank call-money rate ended higher at 5.11% on Friday compared to 5.10% on Thursday.
- Government bond prices ended lower on Friday dragged down by uncertainty around ceasefire talks and weak auction demand.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.90% on Friday compared to 6.89% on Thursday.

Indian Rupee

- The rupee appreciated against the US dollar on Friday, supported by lower crude oil prices and positive domestic equities, despite a firm dollar index.

Regulatory

- The Reserve Bank of India's variable rate reverse repo (VRRR) auction received robust demand from banks on April 17, 2026, with bids totalling Rs 2.28 lakh crore against a notified amount of Rs 2 lakh crore.
- The Securities and Exchange Board of India (Sebi), Chairman Tuhin Kanta Pandey said India's capital markets are increasingly being recognised as a stable, resilient, and globally competitive destination for long-term capital, even amid ongoing geopolitical uncertainties and market volatility.
- SEBI amended the 'fit and proper person' framework for market intermediaries, removing the automatic disqualification triggered by mere filing of criminal complaints, FIRs, or charge sheets in economic offence cases.

Economy and Government

- According to data released by the Reserve Bank of India, India Foreign Exchange Reserves increased to \$700.95 billion on week on April 10 compared to \$697.12 billion in the previous week, driven by a rise in foreign currency assets and gold reserves.
- According to the Ficci-IBA survey the Indian banking sector is likely to see 9-13% industrial credit growth in the January-June period of 2026.
- The corporate affairs ministry plans to rationalise the filing framework, including consolidation of forms, under the companies law after gathering stakeholders' inputs.
- The Petroleum and Natural Gas Regulatory Board (PNGRB) of India said it has opened bidding for the development of Liquefied Petroleum Gas (LPG) pipeline infrastructure in a significant way to eliminate bulk movement to the extent possible.
- The Andhra Pradesh government approved an investment of Rs 2,550 crore by NPSPL Speciality Chemicals Private Ltd to set up a cathode material manufacturing facility in Chittoor district.

Domestic Debt Market Indicators

Instrument	17 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.11%	5.10%	5.30%	5.40%	7.00%	5.75%
3-Month T-Bill	5.17%	5.17%	5.33%	5.36%	5.40%	5.89%
6-Month T-Bill	5.39%	5.45%	5.50%	5.60%	5.51%	5.96%
1-year T-Bill	5.52%	5.55%	5.60%	5.60%	5.70%	6.00%
3-Month CD	6.08%	6.08%	7.23%	6.85%	7.35%	6.47%
6-Month CD	6.65%	6.70%	7.28%	7.03%	7.30%	6.72%
1-year CD	6.94%	6.90%	7.12%	7.03%	7.25%	6.78%
3-Month CP	6.47%	6.42%	7.55%	7.15%	7.75%	6.77%
6-Month CP	7.05%	7.07%	7.65%	7.25%	7.65%	7.08%
1-year CP	7.31%	7.27%	7.50%	7.33%	7.60%	7.14%
1-year Gilt	5.80%	5.85%	5.75%	5.71%	5.82%	6.05%
3-year Gilt	6.27%	6.30%	6.12%	5.91%	6.43%	6.05%
5-year Gilt	6.58%	6.57%	6.46%	6.47%	6.90%	6.10%
1-year AAA	7.22%	7.22%	7.40%	7.13%	7.57%	7.00%
3-year AAA	7.45%	7.43%	7.40%	7.14%	7.59%	7.00%
5-year AAA	7.57%	7.55%	7.42%	7.29%	7.67%	7.00%
10-year G-sec	6.90%	6.89%	6.71%	6.68%	7.02%	6.37%
Net LAF (Rs Cr)	409494	521472	81964	121502	245161	213939
Forex reserves (\$ bn)	700.95	697.12	716.81	687.19	642.49	677.84

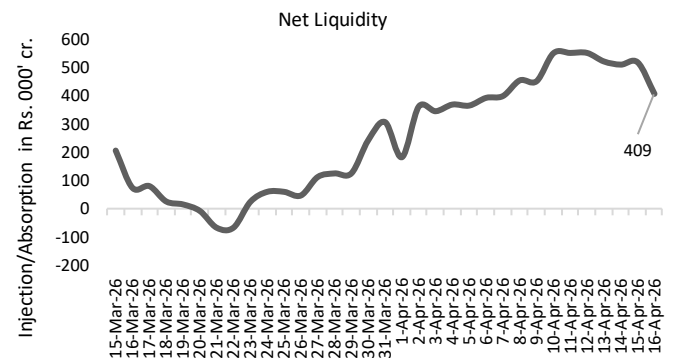
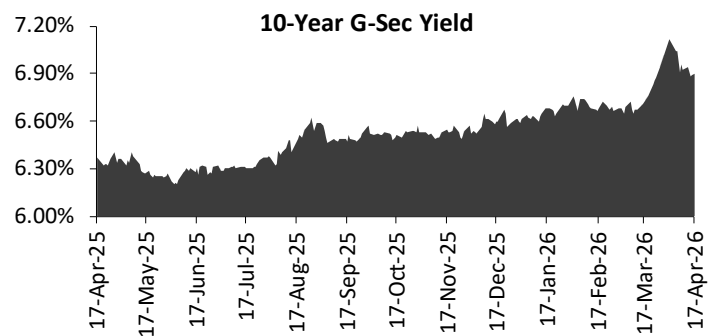
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.39	6.85	7.59	7.64	8.87	9.35
1 Year	5.80	7.22	7.96	8.01	9.24	9.72
3 Year	6.27	7.45	8.19	8.24	9.47	9.95
5 Year	6.58	7.57	8.41	8.46	9.69	10.17
10 Year	6.90	7.62	8.46	8.51	9.74	10.22

Rs. Cr (Debt)	FII Inv 16 Apr	MF Inv 7 Apr
Buy	565	20,310
Sell	1,202	19,115
Net	-637	1,195
Net (MTD)	-6,883	12,003
Net (YTD)	-1,476	-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

- NDR InvIT Trust acquired two Grade-A, fully operational warehousing assets in Kochi and Coimbatore for a total consideration of around Rs 260 crore.
- Lupin Pharmaceuticals, Inc USA entered into a \$30 million settlement agreement with Humana Inc for litigation over alleged anti-competitive practices.
- Adani Properties plans to invest over Rs 1 lakh crore to redevelop Mumbai's Motilal Nagar.
- Sagarmala Finance Corp. plans to raise as much as Rs 10,000 crore (\$1.08 billion) in financial year 2027 to expand lending for ports, shipbuilding, and waterways.



Global market indices	17 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49447.43	1.79	5.22	6.70	26.33
Nikkei 225	58475.9	-1.75	8.89	14.52	70.10
FTSE	10667.63	0.73	2.54	4.83	28.90
Hang Seng	26160.33	-0.89	1.13	5.54	22.27
Taiwan	36804.34	-0.88	8.77	16.02	90.31

Global debt	17 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.26	4.32	4.20	4.24	4.30	4.34
UK 10-Year (%)	4.77	4.88	4.67	4.40	4.88	4.57
German 10-Year (%)	2.97	3.03	2.90	2.84	3.01	2.46
Japan 10-Year (%)	2.43	2.41	2.26	2.18	2.35	1.31

Domestic	17 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	151655	-0.95	-2.58	3.35	59.79
Silver (Rs / Kg)	249940	-0.54	-0.95	8.61	162.68
Aluminium (Rs / Kg)	372	-0.80	7.61	4.69	59.83
Copper (Rs / kg)	1274	-0.12	7.79	8.77	52.91
Lead (Rs / kg)	202	0.15	3.14	2.36	8.88
Zinc (Rs /Kg)	344	-0.13	6.58	6.64	37.87
Nickel (Rs / kg)	1739	0.28	7.41	6.25	28.21

Global	17 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4785.60	-0.33	-4.22	5.69	43.74
Silver (oz/\$)	7859.00	-1.12	-0.46	11.52	138.15
Brent (\$/bbl)	90.38	-9.07	-12.61	-23.63	32.99
NYMEX crude (\$/bbl)	83.85	-11.45	-12.85	-17.29	29.64

Global markets

- Wall Street stocks advanced on Friday as Iran decided to open the Strait of Hormuz, triggering optimism that Iran could reach a deal with the US to end conflicts.
- 10-year US bond yield ended lower at 4.26% as Iran said maritime traffic could pass through the Strait of Hormuz after Israel and Lebanon agreed to a 10-day ceasefire, easing investor concerns that global inflation would push higher and economic activity weaken.
- FTSE index ended higher on Friday after Iran's government announced that the Strait of Hormuz is open for the remaining period of ceasefire.
- Asian markets were trading mostly higher at 8.30 AM.
- The Euro Area trade surplus narrowed to €11.5 billion in February 2026 from €23.1 billion a year earlier. Exports fell 6.7% year on year to €232.4 billion, while imports declined 2.2% to €220.9 billion, reducing the surplus by €11.6 billion.
- The People's Bank of China maintained its key lending rates at record lows for an 11th straight month in April 2026. Accordingly, 1-year loan prime rate (LPR) was held at 3.0%, while the 5-year LPR remained at 3.5%.

Commodity

- Crude oil prices fell by \$10.48 to \$83.85 a barrel on the NYMEX after Iran said passage for all commercial vessels through the Strait of Hormuz was open for the remaining ceasefire period and US President said Iran has agreed to never close the strait again.
- Domestic gold prices declined on Friday due to profit-booking at high levels and a stronger US Dollar.

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		Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	Jun-25
Debt Indicators	Currency in circulation (Rs billion)	41320	40445	39800	39079	38551	38184	38071	38097	38147	38372
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%
	Call rate	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%
	Forex reserves (\$ billion; mthly. avg.)	703	724	696	692	688	699	701	693	698	699

	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	2712.42	1255.65	-1208.29	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69
	IIP, %y/y	NA	5.20%	4.80%	8.00%	7.20%	0.50%	4.60%	4.10%	4.30%	1.50%
	Exports, \$ billion	NA	36.61	36.56	38.51	38.13	34.38	36.38	35.1	37.24	35.14
	Imports, \$ billion	NA	63.71	71.24	63.55	62.66	76.06	68.53	61.59	64.59	53.92
	Manufacturing PMI	53.90	56.9	55.4	55	56.6	59.2	57.7	59.3	59.1	58.4
	Services PMI	57.5	58.1	58.5	58	59.8	58.8	60.9	62.9	60.5	60.4
	GST collections (Rs crore)	200064	183609	193384	174550	170276	195936	189017	186315	195735	184597
	India crude oil import (mbpd)	NA	19.43	21.09	21.59	21.24	21.01	20.21	19.60	18.89	20.32

Sector update	Auto – Passenger vehicles	NA	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%
	Auto – Two-wheelers	NA	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%
	Auto – Commercial vehicles	NA	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%
	Auto – Tractors	NA	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%
	Infra – Coal	NA	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-12.30%	-6.80%
	Infra – Electricity	NA	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%
	Infra – Steel	NA	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%
	Infra – Cement	NA	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%

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