

Daily Market Monitor

April 22, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	21 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24577	0.87	6.33	10.05	1.87
BSE Sensex	79273	0.96	6.36	10.18	-0.17
BSE 100	25970	0.84	7.00	10.95	2.82
BSE 200	11329	0.79	7.39	11.55	3.80
BSE 500	36091	0.77	7.98	12.15	4.28
BSE SmallCap	50984	0.70	12.73	17.97	4.59
BSE MidCap	46366	0.70	10.03	14.38	8.07
BSE LargeCap	9592	0.82	7.00	11.16	3.20
Sectoral indices					
BSE IT	30634	0.59	8.53	9.70	-9.11
BSE Oil & Gas	27281	0.27	5.02	6.73	3.83
BSE FMCG	18756	2.23	8.29	11.81	-8.08
BSE Auto	58797	0.42	7.45	11.75	20.18
BSE Bankex	64663	1.46	7.46	14.28	1.96
BSE Teck	15494	-1.21	3.39	5.20	-8.46
BSE Capital Goods	76490	-0.06	13.58	19.06	22.83
BSE Consumer Durable	60540	0.09	10.57	15.05	4.54

Turnover (Rs Cr)	21 Apr	20 Apr
BSE Cash	7813	7970
NSE Cash	127825	129979
NSE F&O	55862150	20097497

Rs. Cr (Equity)	FII Inv 20 Apr	MF Inv 17 Apr	DII Inv 21 Apr
Buy	13,408	14,078	18,367
Sell	12,901	18,220	16,145
Net	507	-4,141	2,221
Net (MTD)	-40,843	11,361	34,885
Net (YTD)	-169,700	162,901	278,440

	21 Apr	1Day	Month ago	Year ago
USD	93.44	93.07	93.35	85.16
GBP	126.33	125.51	125.16	113.95
Euro	110.02	109.36	107.94	98.03
100 Yen	58.83	58.55	58.94	60.48

Indian markets

- Indian equity benchmarks ended higher on Tuesday, driven by optimism over a potential US-Iran peace deal and expectations of strong fourth-quarter earnings.
- The top gainers were Nestle India, Hindustan Unilever, Trent, Bajaj Finance and Tata Consumer Products, up 2.24-8.43%.
- The top losers were SBI Life Insurance Company, Bharat Electronics, Dr. Reddy's Laboratories, Jio Financial Services and Titan Company, down 0.64-3.46%.

Indian debt

- The interbank call-money rate ended higher at 5.17% on Tuesday compared to 5.13% on Monday.
- Government bond prices ended flat on Tuesday due to caution amid volatile Brent crude oil prices and upcoming state debt auction.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.89% on Tuesday.

Indian Rupee

- The rupee ended lower against the US dollar on Tuesday, pressured by a stronger greenback and the Reserve Bank of India's partial rollback of rules governing offshore derivative trades that were recently imposed to curb the rupee volatility.

Regulatory

- The Reserve Bank of India implemented E-mandate rules for cross-border recurring electronic payments via cards, prepaid instruments, and UPI, requiring pre-transaction notifications and allowing customers to opt-out of transactions while setting limits to enhance fraud prevention and transaction security.
- The Securities and Exchange Board of India lowered the minimum investment requirement for social impact funds from Rs 2 lakh to Rs 1,000, enabling retail investors to participate in the Social Stock Exchange.

Economy and Government

- India's economy is projected to grow at 6.4% in 2026 and 6.6% in 2027, according to the UN's Economic and Social Commission for Asia and the Pacific, which attributes the region's 5.4% growth in 2025 largely to India's strong economic performance.
- Moody's Ratings lowered India's FY27 growth forecast to 6%, from 6.8% earlier, citing weaker private consumption and softer industrial activity amid higher energy and input prices driven by the Iran war.
- India and Singapore are collaborating on a roadmap to develop digital corridors and green shipping infrastructure, leveraging India's renewable energy resources and Singapore's maritime expertise to advance decarbonization efforts in the global shipping sector while creating mutual economic opportunities.

Domestic Debt Market Indicators

Instrument	21 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.17%	5.13%	5.35%	5.48%	7.00%	5.87%
3-Month T-Bill	5.15%	5.18%	5.32%	5.48%	5.40%	5.92%
6-Month T-Bill	5.45%	5.48%	5.50%	5.63%	5.51%	5.96%
1-year T-Bill	5.52%	5.55%	5.62%	5.68%	5.70%	5.98%
3-Month CD	6.11%	6.08%	7.30%	7.09%	7.35%	6.44%
6-Month CD	6.66%	6.67%	7.25%	7.12%	7.30%	6.67%
1-year CD	6.95%	6.95%	7.08%	7.12%	7.25%	6.73%
3-Month CP	6.54%	6.50%	7.58%	7.38%	7.75%	6.75%
6-Month CP	7.07%	7.05%	7.65%	7.55%	7.65%	7.02%
1-year CP	7.32%	7.32%	7.45%	7.55%	7.60%	7.10%
1-year Gilt	5.80%	5.79%	5.74%	5.81%	5.82%	6.00%
3-year Gilt	6.24%	6.24%	6.17%	5.90%	6.43%	6.03%
5-year Gilt	6.58%	6.58%	6.48%	6.42%	6.90%	6.07%
1-year AAA	7.22%	7.22%	7.37%	7.27%	7.57%	6.96%
3-year AAA	7.46%	7.46%	7.43%	7.26%	7.59%	6.97%
5-year AAA	7.57%	7.57%	7.44%	7.33%	7.67%	6.98%
10-year G-sec	6.89%	6.89%	6.74%	6.66%	7.02%	6.32%
Net LAF (Rs Cr)	406675	427698	-6226	-5422	245161	46235
Forex reserves (\$ bn)	700.95	697.12	709.76	687.19	642.49	677.84

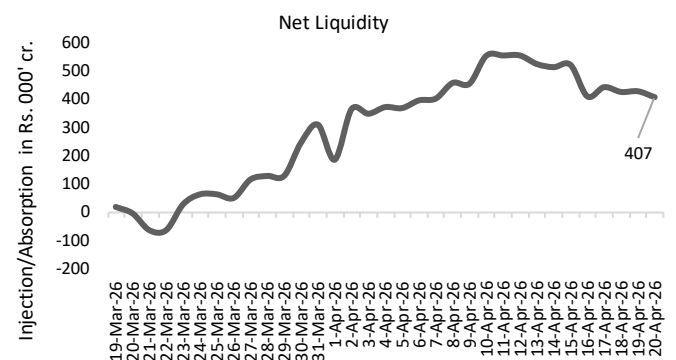
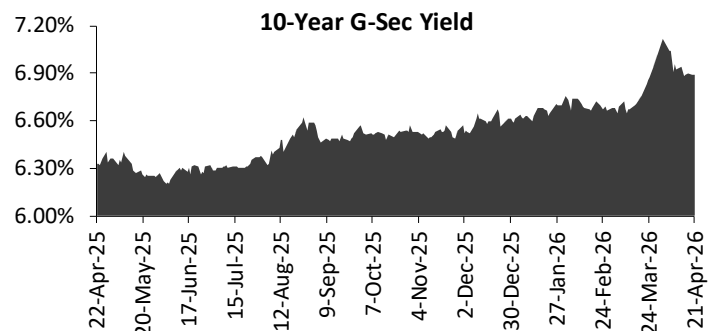
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	6.86	7.60	7.65	8.88	9.36
1 Year	5.80	7.22	7.96	8.01	9.24	9.72
3 Year	6.24	7.46	8.20	8.25	9.48	9.96
5 Year	6.58	7.57	8.41	8.46	9.69	10.17
10 Year	6.89	7.62	8.46	8.51	9.74	10.22

Rs. Cr (Debt)	FII Inv 20 Apr	MF Inv 17 Apr
Buy	357	17,462
Sell	519	16,282
Net	-162	1,180
Net (MTD)	-7,557	39,999
Net (YTD)	-2,150	-274,347

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*	4.87% (March 31, 2026)		-0.71% (March 15, 2026)
Bank Deposit Growth*	2.85% (March 31, 2026)		0.08% (March 15, 2026)

Capital markets

- PNC Infratech emerged as the lowest (L1) bidder for two HAM-based national highway projects worth Rs 3,483 cr.
- BEML has secured an order from the Ministry of Defence for the supply of trawl assemblies, with a contract value of Rs 590 crore.
- IHCL, along with its subsidiaries ANK Hotels and Pride Hospitality completed the acquisition of a 51% stake in Brij Hospital Private Limited for a total investment of up to Rs 222 crore.
- ReaRCo acquired KV Developers and secured Rs 195 crore from the SWAMIH Fund to complete the stalled Greater Noida project, providing relief to approximately 400 homebuyers.
- NavPrakriti plans to invest over Rs 100 crore to establish a greenfield critical minerals refining facility in Odisha that will extract cobalt, nickel, and lithium, with operations expected to commence by 2028-29.
- Rainmatter invested Rs 20 crore in Chennai-based Prime Investor to help the wealth advisory startup transition into a full-stack portfolio management service targeting clients with minimum assets of Rs 50 lakh.



Global market indices	21 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49149.38	-0.59	7.84	6.06	28.76
Nikkei 225	59349.17	0.89	11.20	16.23	73.13
FTSE	10498.09	-1.05	5.85	3.16	26.86
Hang Seng	26487.48	0.48	4.79	6.86	23.80
Taiwan	37605.11	1.75	12.11	18.54	96.82

Global debt	21 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.30	4.26	4.39	4.26	4.30	4.42
UK 10-Year (%)	4.89	4.84	5.00	4.45	4.88	4.57
German 10-Year (%)	3.01	2.98	3.04	2.88	3.01	2.47
Japan 10-Year (%)	2.39	2.39	2.26	2.29	2.35	1.30

Domestic	21 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	152355	0.17	3.49	3.83	57.60
Silver (Rs / Kg)	250513	-0.06	7.81	8.85	160.29
Aluminium (Rs / Kg)	366	0.52	9.06	3.00	58.41
Copper (Rs / kg)	1264	-1.11	7.40	7.94	48.63
Lead (Rs / kg)	200	0.40	3.23	1.34	7.74
Zinc (Rs /Kg)	346	0.67	11.42	7.26	37.29
Nickel (Rs / kg)	1721	-1.39	8.59	5.14	26.39

Global	21 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4809.89	0.89	4.50	6.23	45.09
Silver (oz/\$)	7991.00	0.76	12.17	13.40	146.64
Brent (\$/bbl)	98.48	3.14	-12.22	-16.79	48.63
NYMEX crude (\$/bbl)	89.67	0.07	-9.28	-11.55	42.15

Global markets

- Wall Street stocks closed lower on Tuesday as renewed Middle East tensions offset gains driven by strong corporate earnings.
- 10-year US bond yield ended higher at 4.30% as uncertainty around ongoing geopolitical conflicts kept inflation concerns elevated.
- FTSE index closed lower on Tuesday due to worries ahead of the expiration of the US-Iran ceasefire on Wednesday, despite optimistic remarks from US President about potential peace negotiation.
- Asian markets were trading mostly lower at 8.30 AM.
- US Retail Sales increased 4% in March of 2026, unchanged from the previous month.
- Eurozone ZEW Indicator of Economic Sentiment dropped sharply by 11.9 points to -20.4 in April 2026 compared to -8.5 in March 2026.
- UK unemployment rate eased to 4.9% in February 2026, compared to 5.2% in January 2026.
- Japan trade surplus grew to JPY 667.0 billion in March 2026, compared to JPY 529.8 billion year-over-year, driven by record export growth of 11.7%.

Commodity

- Crude oil prices rose marginally by 6 cents to \$89.67 a barrel on the NYMEX due to uncertainty over peace talks.
- Domestic gold prices rose due to rising safe haven demand amid uncertainty around geopolitical tensions.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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%
Apr 30	Japan Industrial Production YoY Prel, Mar	0.4%

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	GDP	NA	NA	7.80%	7.80%	7.40%	7.40%	6.40%	6.40%	6.40%	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%
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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