

Daily Market Monitor

April 30, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	29 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24178	0.76	5.95	8.27	-0.65
BSE Sensex	77496	0.79	5.32	7.71	-3.48
BSE 100	25598	0.60	6.96	9.36	0.64
BSE 200	11201	0.44	7.79	10.29	1.95
BSE 500	35812	0.45	8.73	11.28	2.95
BSE SmallCap	51913	0.32	16.84	20.12	7.62
BSE MidCap	46526	-0.09	11.83	14.77	7.71
BSE LargeCap	9463	0.55	7.20	9.66	1.21
Sectoral indices					
BSE IT	28225	0.67	-0.78	1.07	-19.91
BSE Oil & Gas	27345	-1.78	6.59	6.98	3.23
BSE FMCG	18914	0.55	10.64	12.76	-7.82
BSE Auto	57642	1.17	7.00	9.56	15.44
BSE Bankex	63411	1.69	7.81	12.07	0.68
BSE Teck	14568	-1.46	-3.17	-1.09	-15.71
BSE Capital Goods	77873	-0.09	18.52	21.22	23.04
BSE Consumer Durable	60212	0.42	12.10	14.43	3.89

Turnover (Rs Cr)	29 Apr	28 Apr
BSE Cash	9149	8054
NSE Cash	139280	138087
NSE F&O	8056531	70883164

Rs. Cr (Equity)	FII Inv 28 Apr	MF Inv 27 Apr	DII Inv 29 Apr
Buy	17,441	16,594	17,232
Sell	19,433	12,518	14,970
Net	-1,992	4,076	2,262
Net (MTD)	-58,869	24,809	47,577
Net (YTD)	-187,726	176,349	291,132

	29 Apr	1Day	Month ago	Year ago
USD	94.79	94.52	94.60	85.20
GBP	127.95	127.75	126.20	114.29
Euro	110.88	110.62	109.16	97.08
100 Yen	59.34	59.36	59.26	59.83

Indian markets

- Indian equity benchmarks ended higher on Wednesday, supported by strong quarterly earnings that lifted individual stocks, but gains were limited by rising Brent crude oil prices amid reports that the US may extend its blockade of Iranian ports.
- The top gainers were ITC, Tech Mahindra, Reliance Industries, Coal India and Maruti Suzuki India, up 2.89% - 3.79%.
- The top losers were InterGlobe Aviation, Dr Reddy's Laboratories, NTPC, Bajaj Finserv and ICICI Bank, down 0.97% - 2.31%.

Indian debt

- The interbank call-money rate ended flat at 5.15% on Wednesday.
- Government bond prices ended lower on Wednesday, pressured by surging crude oil prices that fueled inflation concerns, while caution prevailed ahead of a heavy domestic debt auction and the US Federal Reserve's policy decision.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.99% on Wednesday compared to 6.98% on Tuesday.

Indian Rupee

- The rupee ended lower against the US dollar on Wednesday, pressured by elevated global crude oil prices and foreign fund outflows.

Regulatory

- The Reserve Bank of India (RBI) issued revised directions to update the regulatory framework and registration requirements for non-banking financial companies (NBFCs) that do not access public funds and lack a customer interface, including 'Type I NBFCs'.
- The Reserve Bank issued draft Amendment Directions on February 10, 2026, proposing revisions to UCB lending norms, such as redefining unsecured advances, increasing limits, and granting discretions to Tier 3 and Tier 4 UCBs.

Economy and Government

- Prime Minister Narendra Modi inaugurated the 594-km Ganga Expressway connecting Meerut to Prayagraj in HarDOI district on Wednesday, in the presence of Governor Anandiben Patel, Chief Minister Yogi Adityanath, and others.
- India announced a proposal to amend the Central Motor Vehicles Rules to formally incorporate higher ethanol-blended fuels, including E85, an 85% ethanol and petrol blend, and E100, which would allow vehicles to operate on nearly pure ethanol.
- New and renewable energy minister Pralhad Joshi said the ongoing Iran conflict and resulting LPG shortage offer Indians an opportunity to modify their energy consumption timing.
- The Maharashtra cabinet has approved the Artificial Intelligence Policy 2026, which aims to attract Rs 10,000 crore in investments and create 1.5 lakh new jobs in the state.

Domestic Debt Market Indicators

Instrument	29 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.15%	5.15%	5.50%	5.45%	7.00%	6.00%
3-Month T-Bill	5.26%	5.24%	5.45%	5.48%	5.40%	5.88%
6-Month T-Bill	5.45%	5.46%	5.51%	5.62%	5.51%	5.95%
1-year T-Bill	5.58%	5.57%	5.65%	5.72%	5.70%	5.90%
3-Month CD	6.45%	6.40%	7.55%	7.25%	7.35%	6.52%
6-Month CD	6.85%	6.85%	7.45%	7.32%	7.30%	6.66%
1-year CD	7.35%	7.15%	7.25%	7.12%	7.25%	6.75%
3-Month CP	6.95%	6.90%	7.90%	7.75%	7.75%	6.75%
6-Month CP	7.20%	7.20%	7.85%	7.80%	7.65%	7.02%
1-year CP	7.70%	7.55%	7.62%	7.70%	7.60%	7.09%
1-year Gilt	5.93%	5.90%	5.79%	5.76%	5.82%	6.00%
3-year Gilt	6.45%	6.40%	6.39%	6.04%	6.43%	6.06%
5-year Gilt	6.75%	6.72%	6.76%	6.41%	6.90%	6.09%
1-year AAA	7.36%	7.32%	7.52%	7.23%	7.57%	6.97%
3-year AAA	7.62%	7.61%	7.59%	7.31%	7.59%	6.98%
5-year AAA	7.66%	7.65%	7.67%	7.33%	7.67%	6.99%
10-year G-sec	6.99%	6.98%	6.94%	6.70%	7.02%	6.34%
Net LAF (Rs Cr)	257527	274925	114351	82968	245161	80644
Forex reserves (\$ bn)	703.31	700.95	698.35	701.36	642.49	686.15

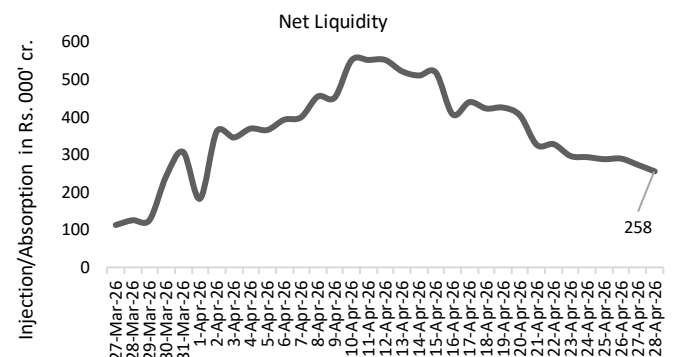
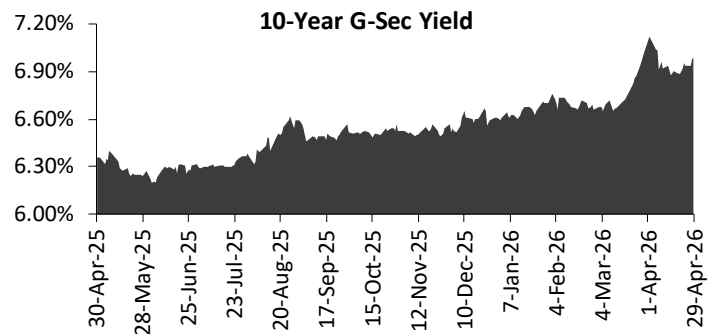
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.07	7.81	7.86	9.09	9.57
1 Year	5.93	7.36	8.10	8.15	9.38	9.86
3 Year	6.45	7.62	8.36	8.41	9.64	10.12
5 Year	6.75	7.66	8.50	8.55	9.78	10.26
10 Year	6.99	7.71	8.55	8.60	9.83	10.31

Rs. Cr (Debt)	FII Inv 28 Apr	MF Inv 27 Apr
Buy	456	12,037
Sell	560	16,840
Net	-103	-4,804
Net (MTD)	-7,946	12,379
Net (YTD)	-2,539	-301,968

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	4.1% (Mar'26)	8.0% (Dec'25)	3.9% (Mar'25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	55.9 (Apr-26)	55.4 (Jan-26)	58.2 (Apr-25)
India Service PMI	57.9 (Apr-26)	58.5 (Jan-26)	58.7 (Apr-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

- Infosys has secured a contract valued at over \$500 million from Truist Financial Corp. to establish and operate a global capability centre (GCC) in Hyderabad.
- Carrier Global plans to invest Rs 863 crore to establish an advanced chiller and cooling systems manufacturing facility at Sri City near Tirupati.
- The SWAMIH Investment Fund plans to invest up to Rs 600 crore in Ramky Estates to help revive its stalled residential projects in Bengaluru.
- Siguler Guff invested \$40 million (around Rs 380 crore) in Trimex Foods, an Indian franchise operator for global brands such as Chilli's Grill & Bar, PAUL, and Cinnabon.
- Prithu secured Rs 10 crore in funding from Transition VC to expand its nature-based carbon removal platform.
- Automotive Research Association of India (ARAI) and the Data Security Council of India (DSCI) have collaborated to strengthen cybersecurity in the Indian automotive sector. This partnership is focused on helping the industry get ready for new data protection regulations.
- Oolka raised \$14 million in a funding round led by Accel, to support the development of AI-driven creditworthiness solutions and help expand bank partnerships.



Global market indices	29 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	-0.57	8.18	5.44	20.56	-0.57
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	10213.11	-1.16	2.47	0.36	20.67
Hang Seng	26111.84	1.68	4.65	5.34	18.65
Taiwan	39303.5	-0.55	18.70	23.90	94.26

Global debt	29 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.42	4.36	4.44	4.24	4.30	4.19
UK 10-Year (%)	5.07	5.01	4.98	4.51	4.88	4.48
German 10-Year (%)	3.10	3.06	3.10	2.83	3.01	2.49
Japan 10-Year (%)	2.46	2.47	2.38	2.26	2.35	1.32

Domestic	29 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147973	-0.54	3.52	0.85	54.12
Silver (Rs / Kg)	236300	-0.10	6.61	2.68	142.63
Aluminium (Rs / Kg)	371	-1.02	9.66	4.26	56.33
Copper (Rs / kg)	1279	0.67	9.03	9.19	49.16
Lead (Rs / kg)	203	-0.17	3.73	2.97	10.63
Zinc (Rs /Kg)	348	-0.29	10.41	7.74	36.39
Nickel (Rs / kg)	1840	0.84	13.12	12.40	36.22

Global	29 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4594.08	-1.83	4.82	1.46	37.71
Silver (oz/\$)	7339.00	-2.16	8.20	4.14	121.86
Brent (\$/bbl)	118.03	6.08	4.85	-0.27	83.70
NYMEX crude (\$/bbl)	106.88	6.95	7.27	5.43	76.90

Global markets

- Wall Street stocks closed mixed on Wednesday with Nasdaq gaining marginally driven by technology stocks buoyed by positive earnings expectations, while the Dow Jones declined as investors remained cautious over rising crude oil prices, the Federal Reserve's decision to hold interest rates steady, and ongoing uncertainty surrounding Middle East tensions.
- 10-year US bond yield ended higher at 4.42% following the Federal Reserve's decision to keep interest rates unchanged.
- FTSE index closed lower on Wednesday weighed down by mixed corporate earnings and caution ahead of central bank decisions in England and the Eurozone.
- Asian markets were trading mostly lower at 8.30 AM.
- US Housing Starts jumped 10.8% to an annualized rate of 1.502 million units in March 2026, compared to a 3% drop in February 2026.
- Eurozone consumer confidence declined to -20.6 in April 2026, compared to -16.4 drop in March 2026.
- Eurozone Consumer Inflation Expectations increased to 49.10 points in April 2026, compared to 43.50 in March 2026.
- Japan Industrial Production increased 2.3% in March 2026 compared to 0.4% gain in February 2026.
- Japan Retail sales increased 1.7% in March 2026, compared to a downwardly revised 0.1% drop in February 2026.

Commodity

- Crude oil prices rose by \$6.95 to \$106.88 a barrel on the NYMEX as stalled US-Iran negotiations raised fears of prolonged supply disruptions, and a larger-than-expected drop in US crude inventories added further upward pressure.
- Gold prices declined due to profit booking amid key central bank decisions.

Forthcoming results

29-Apr	Bajaj Finance Limited
29-Apr	Adani Power Limited
29-Apr	Vedanta Limited
30-Apr	Hindustan Unilever Ltd.
30-Apr	Adani Ports and Special Economic Zone Ltd
30-Apr	Adani Enterprises Ltd.
30-Apr	Bajaj Finserv Limited
30-Apr	Cholamandalam Investment and Finance Company Ltd
30-Apr	Mazagon Dock Shipbuilders Limited
2-May	Kotak Mahindra Bank Ltd.
2-May	Avenue Supermarts Limited

Upcoming market indicators

Date	Indicator	Previous
May 1	US ISM Manufacturing PMI Apr	52.7
May 6	Euro PPI, Mar	-3%
May 7	US Consumer Inflation Expectations, Apr	3.4%
May 8	US Non Farm Payrolls, Apr	178K
May 11	China PPI, Apr	0.5%

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully