

Domestic Market Performance

Indian market indices	11 May	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23816	-1.49	-0.98	6.65	-0.80
BSE Sensex	76015	-1.70	-1.98	5.65	-4.33
BSE 100	25300	-1.54	-0.08	8.09	1.14
BSE 200	11105	-1.50	0.77	9.35	2.97
BSE 500	35680	-1.40	1.93	10.87	4.62
BSE SmallCap	53512	-1.05	10.46	23.82	14.48
BSE MidCap	46906	-1.28	5.25	15.71	11.39
BSE LargeCap	9358	-1.51	0.11	8.44	1.80
Sectoral indices					
BSE IT	28534	-0.18	-4.58	2.18	-18.83
BSE Oil & Gas	26876	-1.96	0.73	5.15	3.00
BSE FMCG	18972	-0.13	6.40	13.10	-5.99
BSE Auto	58913	-1.75	0.34	11.97	16.21
BSE Bankex	61375	-1.57	-2.56	8.47	0.45
BSE Teck	14754	-1.23	-5.46	0.18	-14.80
BSE Capital Goods	78453	-2.09	8.69	22.12	24.82
BSE Consumer Durable	58280	-3.76	0.13	10.76	2.53

Turnover (Rs Cr)	11 May	8 May
BSE Cash	11272	9963
NSE Cash	138987	147669
NSE F&O	22662758	13989833

Rs. Cr (Equity)	FII Inv 8 May	MF Inv 7 May	DII Inv 11 May
Buy	15,413	13,918	21,626
Sell	16,794	13,552	15,687
Net	-1,381	366	5,940
Net (MTD)	-7,588	12,435	27,333
Net (YTD)	-205,317	194,569	321,952

	11 May	1Day	Month ago	Year ago
USD	95.20	94.44	92.65	85.64
GBP	129.38	128.31	124.31	113.40
Euro	111.93	110.92	108.28	96.29
100 Yen	60.60	60.24	58.16	58.92

Indian markets

- Indian equity benchmarks ended lower on Monday, after Prime Minister Narendra Modi called for measures to mitigate the economic impact of rising energy costs, as oil prices climbed amid declining prospects of a peace agreement in West Asia.
- The top losers were Titan Company, InterGlobe Aviation, State Bank of India, Eternal and Jio Financial Services, down 3.81-6.85%.
- The top gainers were Tata Consumer Products, Max Healthcare Institute, Coal India, Sun Pharmaceutical Industries and Hindustan Unilever, up 0.97-8.05%.

Indian debt

- The interbank call-money rate ended lower at 4.75% on Monday compared to 5.20% on Friday.
- Government bond prices ended lower on Monday, as stalled US-Iran peace talks drove oil prices higher, raising inflation and fiscal stability concerns ahead of April inflation data.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.03% on Monday compared to 6.98% on Friday.

Indian Rupee

- The rupee ended lower against the United States dollar on Monday, due to rising crude oil prices, large foreign fund outflows and a stronger dollar index.

Regulatory

- SEBI proposed a new green-channel mechanism, GARUDA, for alternative investment funds (AIFs) to launch schemes to 10 working days of filing their placement memorandums from the current 30 days, in a bid to speed up the deployment of capital by them.

Economy and Government

- Periodic Labour Force Survey (PLFS) data released by the government, India's urban unemployment rate for persons aged 15 years and above eased to 6.6% in the January-March 2026 quarter from 6.7% in the previous quarter.
- MOSPI Secretary Saurabh Garg said that India's creative economy, now an integral part of the services sector, requires dedicated measurement and formalisation to drive future growth, highlighting that digital and creative segments are among the fastest-growing and have become central to economic expansion, on par with agriculture and manufacturing.
- Prime Minister Narendra Modi urged citizens to conserve foreign exchange amid rising oil prices, which are straining the rupee and depleting reserves.
- The Rajasthan government has signed agricultural MoUs worth Rs 1,679 crore ahead of Gram 2026 to promote investment and development in the state's agriculture sector.
- The Ministry of Petroleum and Natural Gas has assured that crude oil inventories are stable, refineries are operating optimally, and there are no fuel shortages nationwide, thanks to government measures ensuring uninterrupted supplies, despite global energy supply disruptions.
- The Rail Minister Ashwini Vaishnaw announced that the Rs 16 trillion plan to develop seven new high-speed rail corridors across India is progressing as scheduled, and the connected cities are expected to operate more as integrated economic zones.

Domestic Debt Market Indicators

Instrument	11 May	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.75%	5.20%	4.75%	4.65%	7.00%	5.85%
3-Month T-Bill	5.30%	5.29%	5.26%	5.32%	5.40%	5.89%
6-Month T-Bill	5.50%	5.50%	5.55%	5.55%	5.51%	5.90%
1-year T-Bill	5.64%	5.63%	5.59%	5.59%	5.70%	5.86%
3-Month CD	6.60%	6.60%	6.15%	6.93%	7.35%	6.64%
6-Month CD	7.00%	6.97%	6.80%	7.05%	7.30%	6.80%
1-year CD	7.45%	7.35%	7.00%	6.92%	7.25%	6.85%
3-Month CP	7.25%	7.13%	6.51%	7.55%	7.75%	6.90%
6-Month CP	7.43%	7.40%	7.15%	7.60%	7.65%	7.16%
1-year CP	7.85%	7.77%	7.35%	7.45%	7.60%	7.20%
1-year Gilt	5.87%	5.80%	5.86%	5.69%	5.82%	6.06%
3-year Gilt	6.39%	6.32%	6.35%	5.99%	6.43%	6.04%
5-year Gilt	6.78%	6.68%	6.53%	6.48%	6.90%	6.08%
1-year AAA	7.55%	7.47%	7.37%	7.09%	7.57%	7.10%
3-year AAA	7.66%	7.62%	7.44%	7.21%	7.59%	7.10%
5-year AAA	7.72%	7.68%	7.60%	7.26%	7.67%	7.10%
10-year G-sec	7.04%	6.98%	6.92%	6.71%	7.02%	6.38%
Net LAF (Rs Cr)	222158	214847	554023	286404	245161	170742
Forex reserves (\$ bn)	690.69	698.49	697.12	723.77	642.49	686.06

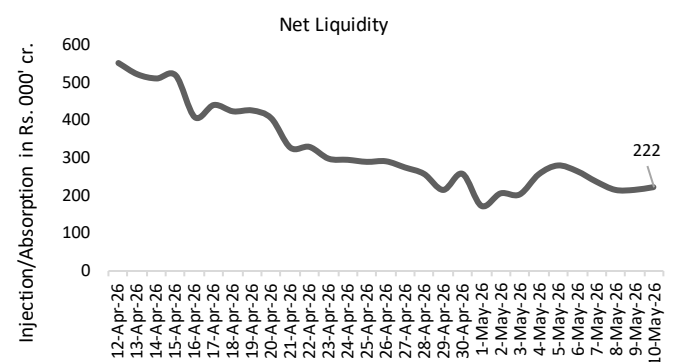
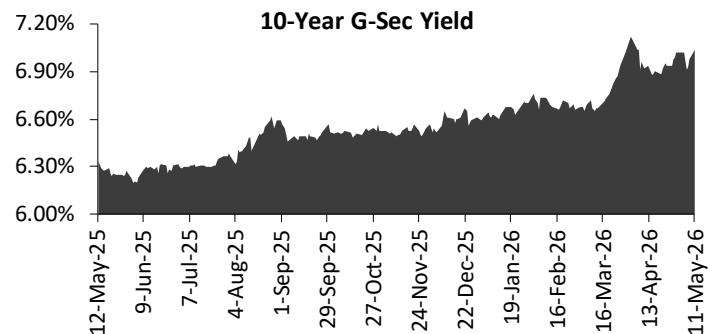
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	7.17	7.91	7.96	9.19	9.67
1 Year	5.87	7.55	8.29	8.34	9.57	10.05
3 Year	6.39	7.66	8.40	8.45	9.68	10.16
5 Year	6.78	7.72	8.56	8.61	9.84	10.32
10 Year	7.04	7.75	8.59	8.64	9.87	10.35

Rs. Cr (Debt)	FII Inv 8 May	MF Inv 7 May
Buy	669	31,651
Sell	267	31,132
Net	402	520
Net (MTD)	-412	-14,510
Net (YTD)	-2,602	-327,123

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	54.7 (Apr-26)	55.4 (Jan-26)	58.2 (Apr-25)
India Service PMI	58.8 (Apr-26)	58.5 (Jan-26)	58.7 (Apr-25)
Bank Credit Growth*	0.84% (April 30, 2026)		-2.22% (April 15, 2026)
Bank Deposit Growth*	1.39% (April 30, 2026)		-2.06% (April 15, 2026)

Capital markets

- Afcons Infrastructure emerged as the L1 bidder for the reconstruction of an existing railway track and the construction of a second-track railway line in Europe worth Rs 7,544 crore.
- HFCL secured export orders worth around \$19.32 million for the supply of optical fiber cables from renowned international customers.
- HG Infra Engineering received a Letter of Award worth Rs 3,931.11 crore from Welspun Enterprises, Maharashtra, for the construction of a six-lane highway corridor along with the improvement of an existing road.
- Embraer signed its first forged raw material supply contract with Indian firm Bharat Forge Limited, marking a significant step in Embraer's supply chain diversification strategy to boost resilience, competitiveness, and support the growth of the Indian aerospace industry.
- BSE launched futures and options (F&O) contracts on the BSE Focused IT Index, becoming the first exchange in India to introduce derivative products benchmarked specifically to the information technology sector.
- WhiteBoard Advisory & Management (WB) and Casagrind received SEBI approval to
- raise Rs 500 crore through the jointly formed Millenia WB Yield Fund to provide growth capital for residential projects.



Global market indices	11 May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49704.47	0.19	3.73	7.26	20.50
Nikkei 225	62417.88	-0.47	9.65	22.24	66.43
FTSE	10269.43	0.36	-3.12	0.91	20.04
Hang Seng	26406.84	0.05	1.98	6.53	15.48
Taiwan	41790.06	0.45	17.99	31.73	99.81

Global debt	11 May	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.42	4.38	4.31	4.18	4.30	4.37
UK 10-Year (%)	5.03	4.92	4.84	4.48	4.88	4.56
German 10-Year (%)	3.04	3.00	3.05	2.80	3.01	2.55
Japan 10-Year (%)	2.51	2.48	2.45	2.24	2.35	1.37

Domestic	11 May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	150362	-0.47	0.02	2.47	55.95
Silver (Rs / Kg)	256200	0.23	6.78	11.33	167.64
Aluminium (Rs / Kg)	376	1.39	5.44	5.81	59.66
Copper (Rs / kg)	1338	1.52	10.22	14.23	55.91
Lead (Rs / kg)	206	0.74	3.09	4.24	13.54
Zinc (Rs /Kg)	352	0.47	5.32	9.14	38.27
Nickel (Rs / kg)	1836	0.05	11.85	12.18	36.70

Global	11 May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4696.18	-0.07	-2.02	3.72	42.14
Silver (oz/\$)	7936.00	-0.39	4.08	12.62	144.49
Brent (\$/bbl)	104.21	2.88	9.46	-11.95	63.06
NYMEX crude (\$/bbl)	98.07	2.78	1.55	-3.26	60.72

Upcoming market indicators

Date	Indicator	Previous
May 12	US Inflation Rate, Apr	3.3%
May 13	Eurozone Industrial Production, Mar	-0.6%
May 14	UK GDP Growth Rate QoQ Prel Q1	0.1%
May 15	Japan PPI, Apr	2.6%
May 18	China Industrial Production, Apr	5.7%

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

Global markets

- Wall Street stocks closed higher on Monday boosted by continued optimism around AI-related stocks, despite volatile oil prices and stalled US-Iran talk, which kept inflation concerns in focus.60.
- 10-year US bond yield ended higher at 4.42% driven by renewed geopolitical tensions in the Middle East, specifically surrounding US-Iran negotiations, and rising oil prices.
- FTSE index closed higher on Monday driven by gains in mining stocks and a surge in shares of Airtel Africa.
- Asian markets were trading mostly higher at 8.30 AM.
- US existing home sales increased 0.2% on month to an annualized rate of 4.02 million in April of 2026, following a revised 2.9% plunge in March.
- China's producer prices rose 2.8% on year in April 2026, picking up from a 0.5% gain in the prior month.
- Japan Household spending declined 2.9% in March 2026, compared to a 1.8% drop in February 2026.

Commodity

- Crude oil prices rose by \$2.65 to \$98.07 a barrel on the NYMEX as ceasefire concerns resurfaced after the US President signaled rising tensions, increasing fears of supply disruptions through Strait of Hormuz.
- Domestic gold prices declined following a call from Prime Minister Narendra Modi to avoid buying gold for a year.

Forthcoming results

Date	Company
12-May	Tata Power Co. Ltd
12-May	Dr. Reddy's Laboratories Ltd.
13-May	Tata Motors Limited
13-May	Cipla Ltd.
14-May	JSW Steel Limited
22-May	Hindalco Industries Ltd.
27-May	Cummins India Ltd.

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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