Daily Market Monitor

July 02, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	1 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24006	0.59	2.67	7.50	-6.01
BSE Sensex	76923	0.58	3.58	6.91	-8.09
BSE 100	25569	0.59	2.89	9.24	-4.53
BSE 200	11223	0.51	2.70	10.50	-3.23
BSE 500	36119	0.45	2.97	12.23	-2.49
BSE SmallCap	55977	0.33	6.61	29.52	2.53
BSE MidCap	47512	0.00	2.68	17.21	1.48
BSE LargeCap	9458	0.57	2.74	9.60	-3.88
Sectoral indices					
BSE IT	25219	-1.94	-12.55	-9.70	-33.68
BSE Oil & Gas	26083	0.21	-1.99	2.05	-6.60
BSE FMCG	18506	1.76	3.40	10.32	-7.95
BSE Auto	59233	1.10	3.81	12.58	10.98
BSE Bankex	65462	0.66	8.34	15.70	2.07
BSE Teck	13914	-1.03	-8.05	-5.53	-25.73
BSE Capital Goods	81156	-0.32	2.93	26.33	11.89
BSE Consumer Durable	60021	0.66	5.51	14.07	-0.04

Turnover (Rs Cr)	1 July	30 June
BSE Cash	9941	10973
NSE Cash	119243	140407
NSE F&O	7747826	75030365

Rs. Cr (Equity)	FII Inv 30 June	MF Inv 29 June	DII Inv 1 July
Buy	25,304	44,266	17,137
Sell	27,085	42,513	13,977
Net	-1,781	1,754	3,159
Net (MTD)	-29,172	53,410	3,159
Net (YTD)	-273,790	298,631	465,744

	1 July	1Day	Month ago	Year ago
USD	94.73	94.60	94.89	85.62
GBP	125.42	125.13	127.77	117.65
Euro	108.03	107.72	110.59	100.85
100 Yen	58.22	58.27	59.50	59.58

Indian markets

- Indian equity benchmarks ended higher on Wednesday, driven by gains in financial, auto and consumer-oriented stocks amid softer oil prices and anticipation of a US-India trade agreement.
- The top gainers were Eternal, Adani Enterprises, Nestlé India, Asian Paints and Hindustan Unilever, up 2.99-5.82%.
- The top losers were HCL Technologies, Tech Mahindra, Tata Consultancy Services, Hindalco Industries and Tata Steel, down 1.63-3.40%.

Indian debt

- The interbank call-money rate ended lower at 4.60% on Wednesday compared to 5.45% on Tuesday.
- Government bond prices ended higher on Wednesday, on expectations of Bloomberg bond index inclusion.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.75% on Wednesday compared to 6.76% on Tuesday.

Indian Rupee

- The rupee weakened against the US dollar on Wednesday, as investors remained cautious ahead of remarks from the US Federal Reserve Chair and amid continued uncertainty around negotiations connected to the ongoing conflict.

Regulatory

- RBI regulations effective July 1 have introduced stricter norms on banks' exposure to real estate and capital markets, including limits on third-party collateral usage and explicit lending caps, to enhance financial stability and reduce systemic risks.

Economy and Government

- India HSBC Manufacturing PMI eased to 54.2 in June 2026 compared to 55.0 in May 2026.
- India's GST collections rose to Rs 1,94,812 crore in June compared to Rs 1,94,184 in May 2026, driven by higher imports and strong economic activity.
- According to the Prime Minister, India's Digital India initiative has strengthened digital infrastructure and global positioning.
- West Bengal has notified the VB-G RAM G rural employment scheme replacing MGNREGA from July 1, guaranteeing 125 days of wage employment with Rs 14,180 crore Centre-state funding focused on rural infrastructure, livelihoods, and climate-resilient projects.
- The Government of India raised Rs 18,560 crore through stake sales in six PSU companies during Q1 FY27, marking its largest quarterly divestment in recent years and supporting capital market activity amid subdued equity issuances.
- The Union Cabinet has approved two highway projects worth over Rs 14,000 crore, including a six-lane tunnel linking Dwarka Expressway to South Delhi and a greenfield Kanpur–Kabrai highway, aimed at improving urban mobility and logistics efficiency.
- The Cabinet has approved a Rs 7,145 crore Kanpur–Kabrai greenfield highway project and a Rs 6,969 crore six-lane tunnel linking key Delhi corridors, aimed at improving connectivity and logistics efficiency.

Domestic Debt Market Indicators

Instrument	1 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.44	7.02	7.74	7.82	9.05	9.53
3-Month T-Bill	5.75	7.25	7.97	8.05	9.28	9.76
6-Month T-Bill	6.17	7.24	7.96	8.04	9.27	9.75
1-year T-Bill	6.42	7.29	8.11	8.19	9.42	9.90
3-Month CD	6.75	7.38	8.20	8.28	9.51	9.99
6-Month CD	5.44	7.02	7.74	7.82	9.05	9.53
1-year CD	5.75	7.25	7.97	8.05	9.28	9.76
3-Month CP	6.17	7.24	7.96	8.04	9.27	9.75
6-Month CP	6.42	7.29	8.11	8.19	9.42	9.90
1-year CP	6.75	7.38	8.20	8.28	9.51	9.99
1-year Gilt	5.44	7.02	7.74	7.82	9.05	9.53
3-year Gilt	5.75	7.25	7.97	8.05	9.28	9.76
5-year Gilt	6.17	7.24	7.96	8.04	9.27	9.75
1-year AAA	6.42	7.29	8.11	8.19	9.42	9.90
3-year AAA	6.75	7.38	8.20	8.28	9.51	9.99
5-year AAA	5.44	7.02	7.74	7.82	9.05	9.53
10-year G-sec	5.75	7.25	7.97	8.05	9.28	9.76
Net LAF (Rs Cr)	6.17	7.24	7.96	8.04	9.27	9.75
Forex reserves ($ bn)	6.42	7.29	8.11	8.19	9.42	9.90

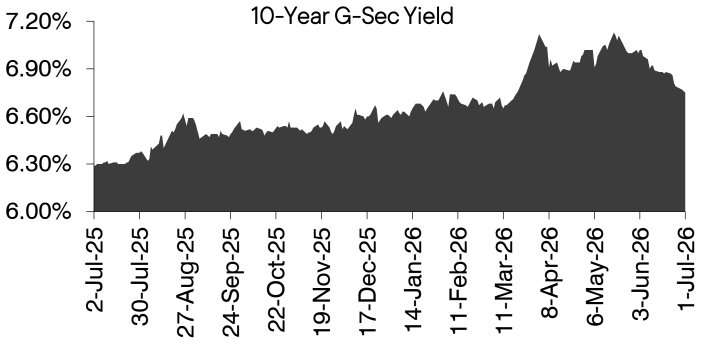
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.44	7.02	7.74	7.82	9.05	9.53
1 Year	5.75	7.25	7.97	8.05	9.28	9.76
3 Year	6.17	7.24	7.96	8.04	9.27	9.75
5 Year	6.42	7.29	8.11	8.19	9.42	9.90
10 Year	6.75	7.38	8.20	8.28	9.51	9.99

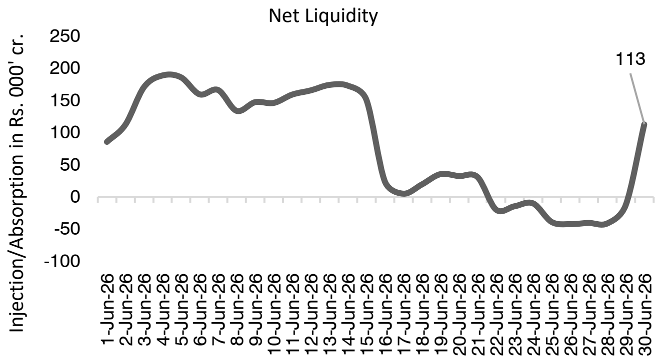
Rs. Cr (Debt)	FII Inv 30 June	MF Inv 29 June
Buy	1,755	12,788
Sell	477	14,729
Net	1,278	-1,941
Net (MTD)	32,648	-89,963
Net (YTD)	29,535	-475,972

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.93% (May'26)	3.21% (Feb'26)	3.03% (May'25)
WPI	9.68% (May'26)	2.18% (Feb'25)	-0.20% (May'25)
IIP	5.10% (May'26)	5.30% (Feb'26)	4.80% (May'25)
GDP	7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY25)
India Manufacturing PMI	54.5 (June-26)	53.9 (Mar-26)	58.4 (June-25)
India Service PMI	57.3 (June-26)	57.5 (Mar-26)	60.4 (June-25)
Bank Credit Growth*	1.22% (May 31, 2026)		-0.68% (May 15, 2026)
Bank Deposit Growth*	1.55% (May 31, 2026)		-0.12% (May 15, 2026)

Capital markets

- TMC Transformers (India) has filed draft IPO papers with SEBI to raise up to Rs 550 crore, aimed at funding expansion and strengthening its capital base.
- Renfra Energy India has filed IPO papers to raise Rs 430 crore via fresh issue, with proceeds planned for debt reduction and working capital, along with an offer for sale of up to 4.7 million shares by existing shareholders.
- Supply6 raised Rs 48 crore in funding led by Unilever Ventures, to scale product innovation, research, and expand distribution across multiple channels.
- Lime raised $167 million via a US IPO, highlighting investor interest in sustainable urban mobility solutions.
- M3M Group plans to invest Rs 10,000 crore in FY27 towards construction and land acquisition, indicating strong expansion in real estate development.
- Coal India Limited secured a Rs 2,831 crore contract to develop a 600 MW solar power facility at Jalaun Solar Park in Uttar Pradesh.
- Godrej Properties acquired a Noida land parcel with an estimated revenue potential of Rs 2,000 crore, reinforcing its growth pipeline in the NCR real estate market.
- EPACK Durable received approval for a Rs 1,084 crore investment plan in Andhra Pradesh, boosting manufacturing capacity and regional growth.





Global market indices	1 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52305.24	-0.03	2.40	12.87	17.55
Nikkei 225	70474.96	0.59	5.29	38.01	76.25
FTSE	10478.34	-0.18	1.35	2.97	19.27
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	47018.99	1.94	3.71	48.22	108.48

Global debt	1 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.48	4.44	4.47	4.33	4.30	4.26
UK 10-Year (%)	4.77	4.77	4.88	4.83	4.88	4.44
German 10-Year (%)	2.92	2.91	3.01	3.00	3.01	2.57
Japan 10-Year (%)	2.71	2.69	2.68	2.31	2.35	1.38

Domestic	1 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141632	0.24	-8.94	-3.48	45.37
Silver (Rs / Kg)	225430	0.00	-14.37	-2.04	110.76
Aluminium (Rs / Kg)	331	-0.93	-15.22	-6.81	33.13
Copper (Rs / kg)	1294	-1.49	-5.45	10.54	43.81
Lead (Rs / kg)	204	0.00	-2.28	3.35	11.64
Zinc (Rs /Kg)	364	-1.06	-1.94	12.89	40.13
Nickel (Rs / kg)	1583	-1.25	-13.88	-3.31	19.60

Global	1 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4025.28	0.04	-11.01	-11.10	22.08
Silver (oz/$)	5944.00	2.15	-19.69	-15.65	65.07
Brent ($/bbl)	71.57	-1.89	-24.65	-39.53	6.65
NYMEX crude ($/bbl)	68.58	-1.32	-25.59	-32.35	4.78

Upcoming market indicators

Date	Indicator	Previous
July 2	US Non Farm Payrolls, Junee	172K
July 6	Eurozone PPI, May	4.9%
July 7	UK Halifax House Price Index, June	0.5%
July 9	China Inflation Rate, June	1.2%
July 10	India Bank Loan Growth, June/26	17.7%

Global markets

- Wall Street stocks closed lower on Wednesday due to sharp losses in technology stocks amid valuation and AI-spending concerns.
- 10-year US bond yield ended higher at 4.48% after Newly appointed Fed Chairman Kevin Warsh at the European Central Bank's annual policy forum in Sintra said prices are too high.
- FTSE index closed lower on Wednesday dragged down by losses in energy and healthcare stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone construction output has contracted by 1.9% year-over-year in February 2026, extending the sector's downward trend following a steeper 4.1% decline in January 2026.

Commodity

- Crude oil prices fell by 92 cents to $68.58 a barrel on the NYMEX as optimism over US-Iran talks eased supply concerns.
- Domestic gold rose marginally due to value buying.

Forthcoming results

NA	NA

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	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25
Debt Indicators	Currency in circulation (Rs billion)	42826.4	42288.66	41320	40445	39800	39079	38551	38184	38071	38097
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%
	Call rate	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%
	Forex reserves ($ billion; mthly. avg.)	689.49	700	703	724	696	692	688	699	701	693
	GDP	NA	NA	NA	7.80%			7.40%			
	Fiscal deficit (Rs billion)	NA	3623.03	2665.2	2712.42	1255.65	NA	3623.03	2665.2	2712.42	1255.65
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	NA	4.90%	4.10%	5.20%	4.80%
	Exports, $ billion	NA	43.56	38.92	36.61	36.56	NA	43.56	38.92	36.61	36.56
	Imports, $ billion	NA	71.94	59.59	63.71	71.24	NA	71.94	59.59	63.71	71.24
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55.00	54.70	53.90	56.9	55.4
	Services PMI	59.80	58.80	57.5	58.1	58.5	59.80	58.80	57.5	58.1	58.5
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	194,184	242,702	200064	183609	193384
	India crude oil import (mbpd)	NA	NA	19.00	19.43	21.09	NA	NA	19.00	19.43	21.09
Sector update	Auto – Passenger vehicles	NA	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%
	Auto – Two-wheelers	NA	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%
	Auto – Commercial vehicles	NA	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%
	Auto – Tractors	NA	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%
	Infra – Coal	NA	-4%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-12.30%
	Infra – Electricity	NA	-0.50%	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%
	Infra – Steel	NA	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%
	Infra – Cement	NA	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%