Daily Market Monitor

July 06, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	3 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24271	0.39	3.70	8.68	-4.47
BSE Sensex	77764	0.34	4.60	8.08	-6.58
BSE 100	25809	0.24	3.82	10.27	-3.07
BSE 200	11318	0.17	3.54	11.44	-1.89
BSE 500	36431	0.15	3.77	13.20	-1.25
BSE SmallCap	56427	-0.09	6.53	30.56	3.08
BSE MidCap	47850	-0.10	3.62	18.04	2.44
BSE LargeCap	9542	0.24	3.57	10.58	-2.46
Sectoral indices					
BSE IT	26730	1.55	-6.53	-4.28	-29.77
BSE Oil & Gas	26201	-0.03	-1.21	2.51	-6.44
BSE FMCG	18629	0.04	4.31	11.06	-7.40
BSE Auto	59766	-0.42	3.98	13.59	11.29
BSE Bankex	65450	-0.09	7.13	15.68	3.26
BSE Teck	14507	1.54	-3.89	-1.50	-22.60
BSE Capital Goods	78741	-2.26	-0.77	22.57	9.17
BSE Consumer Durable	60699	-0.32	5.97	15.36	-0.56

Turnover (Rs Cr)	3 July	2 July
BSE Cash	10591	11203
NSE Cash	131654	122378
NSE F&O	14794101	8295954

Rs. Cr (Equity)	FII Inv 2 July	MF Inv 1 July	DII Inv 3 July
Buy	16,754	13,472	18,676
Sell	14,405	11,256	20,630
Net	2,349	2,216	-1,954
Net (MTD)	2,489	2,216	2,990
Net (YTD)	-271,301	300,277	465,574

	3 July	1Day	Month ago	Year ago
USD	95.24	95.27	95.78	85.51
GBP	127.41	126.66	128.78	116.66
Euro	109.15	108.50	111.26	100.89
100 Yen	59.25	58.72	59.88	59.44

Indian markets

- Indian equity benchmarks ended higher on Friday, supported by positive global cues and amid growing expectations of a more accommodative global rate environment following softer US labour market data.
- The top gainers were HCL Technologies, Max Healthcare, Sun Pharmaceuticals, Dr Reddys Labs and Bajaj Finserv—up 1.85%-5.74%.
- The top losers were Axis Bank, SBI, Larsen & Toubro Ltd, Bajaj Auto and Adani Ports—down 0.73%-1.51%.

Indian debt

- The interbank call-money rate ended higher at 5.28% on Friday compared to 4.60% on Thursday.
- Government bond prices ended marginally higher on Friday, supported by persistent foreign buying driven by expectations of the inclusion of Indian government bonds in global bond indices.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.71% on Friday compared to 6.72% on Thursday.

Indian Rupee

- The rupee strengthened against the greenback in the spot market on Friday due to a weaker dollar index.

Regulatory

- SEBI has revised rules governing unpaid client securities, easing operational compliance for brokers while strengthening investor protection and settlement efficiency.
- IRDAI is planning a significant overhaul of insurance commission regulations to curb mis-selling and improve transparency and customer outcomes.

Economy and Government

- India HSBC Services PMI edged lower to 57.4 in June 2026 compared to 58.9 in May 2026. Meanwhile, the HSBC Composite PMI declined to 57.4 from 59.3.
- According to RBI data, India's foreign exchange reserves declined by $5.66 billion to $666.93 billion for the week ended June 26, 2026, compared to $672.59 billion in the previous week.
- Andhra Pradesh Chief Minister N. Chandrababu Naidu launched the construction of the JSW Rayalaseema Integrated Steel Plant at Sunnapurallapalli and Peddadanluru villages in Kadapa district.
- Odisha has signed an MoU with Japan-based Nippon Steel and the ACME Group for Rs 67,000 crore of investment proposals, aimed at boosting industrial development, green energy, and employment generation in the state.
- The government is taking measures to address concerns surrounding the mandatory rollout of E20 petrol, balancing ethanol blending goals with consumer and industry preparedness.
- HUDCO plans to provide up to Rs 1 trillion in financing for Bihar's infrastructure projects, supporting large-scale development in housing, urban infrastructure, and public utilities.
- The Assam Cabinet has approved amendments to the Assam Minor Mineral Concession Rules, 2013, aimed at improving regulation, transparency, and efficiency in the mining sector while promoting sustainable mineral resource management.

Domestic Debt Market Indicators

Instrument	3 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.28%	4.60%	4.75%	5.00%	7.00%	5.28%
3-Month T-Bill	5.22%	5.24%	5.55%	5.36%	5.40%	5.31%
6-Month T-Bill	5.46%	5.45%	5.68%	5.63%	5.51%	5.46%
1-year T-Bill	5.62%	5.62%	5.98%	5.67%	5.70%	5.53%
3-Month CD	6.21%	6.21%	7.23%	6.80%	7.35%	5.78%
6-Month CD	6.69%	6.59%	7.58%	7.25%	7.30%	5.98%
1-year CD	6.95%	6.95%	7.85%	7.35%	7.25%	6.22%
3-Month CP	6.65%	6.65%	8.00%	7.20%	7.75%	6.25%
6-Month CP	7.03%	7.00%	8.10%	7.60%	7.65%	6.40%
1-year CP	7.40%	7.40%	8.27%	7.70%	7.60%	6.60%
1-year Gilt	5.72%	5.73%	6.13%	6.02%	5.82%	5.55%
3-year Gilt	6.18%	6.19%	6.53%	6.57%	6.43%	5.83%
5-year Gilt	6.41%	6.40%	6.83%	6.83%	6.90%	6.08%
1-year AAA	7.22%	7.23%	8.00%	7.64%	7.57%	6.45%
3-year AAA	7.24%	7.24%	7.87%	7.69%	7.59%	6.63%
5-year AAA	7.26%	7.26%	7.82%	7.72%	7.67%	6.67%
10-year G-sec	6.71%	6.72%	7.02%	7.12%	7.02%	6.29%
Net LAF (Rs Cr)	99472	86468	170645	364446	245161	404417
Forex reserves ($ bn)	666.93	672.59	681.38	688.06	642.49	697.94

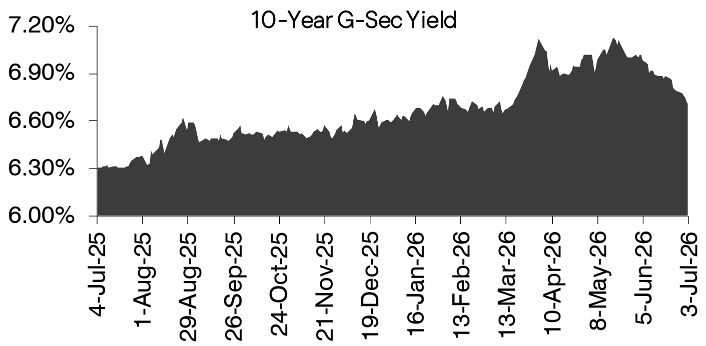
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.28%	4.60%	4.75%	5.00%	7.00%	5.28%
1 Year	5.22%	5.24%	5.55%	5.36%	5.40%	5.31%
3 Year	5.46%	5.45%	5.68%	5.63%	5.51%	5.46%
5 Year	5.62%	5.62%	5.98%	5.67%	5.70%	5.53%
10 Year	6.21%	6.21%	7.23%	6.80%	7.35%	5.78%

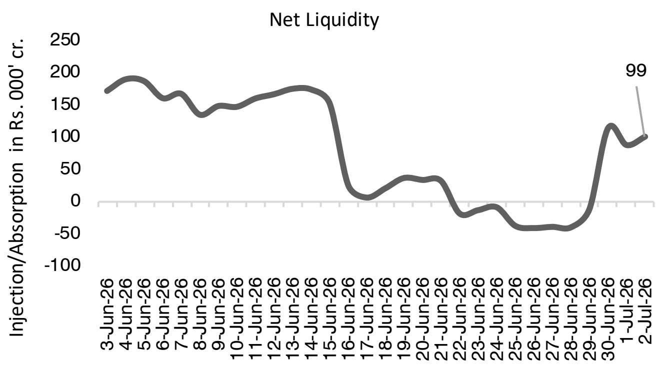
Rs. Cr (Debt)	FII Inv 2 July	MF Inv 1 July
Buy	3,497	19,037
Sell	2,959	11,301
Net	538	7,736
Net (MTD)	1,477	7,736
Net (YTD)	31,012	-472,239

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

- Sterlite Technologies has successfully raised Rs 1,500 crore through a Qualified Institutional Placement (QIP).
- ICICI Prudential Mutual Fund acquired an additional 1.3 crore shares (1% stake) in AWL Agri Business for Rs 234.13 crore at Rs 180.10 per share, increasing its exposure to the company through its Multi-Asset Fund.
- MEIL plans to invest Rs 40,000 crore in capital expenditure over the next three years and targets Rs 2 trillion in revenue within five years, reflecting aggressive expansion plans.
- HCL Technologies has secured a $1.14 billion multi-year contract from a Europe-based Fortune Global 50 company for AI-led digital workplace and enterprise network transformation, significantly enhancing its revenue visibility and AI services portfolio.
- ACME Green Molecules signed a $1 billion agreement with Japan's Mitsubishi Gas Chemical (MGC) to supply 100,000 tonnes of green methanol annually, marking a major step in India's green fuels export market.
- STEAG Energy Services (India) secured a Rs 1,437 crore, five-year operations and maintenance contract for Vedanta Aluminium Metal's 1,215 MW captive power plant.
- BLS E-Services has acquired Atyati Technologies for Rs 157 crore in an all-cash deal, strengthening its digital financial inclusion and technology offerings.





Global market indices	3 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA	NA
Nikkei 225	69744.07	1.47	1.96	36.58	75.30
FTSE	10679.03	0.25	3.36	4.94	21.03
Hang Seng	23350.03	1.28	-8.91	-5.80	-2.99
Taiwan	46780.62	0.08	0.69	47.47	105.96

Global debt	3 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	NA	4.49	4.49	4.31	4.30	4.35
UK 10-Year (%)	4.79	4.79	4.94	4.85	4.88	4.55
German 10-Year (%)	2.93	2.90	3.04	3.00	3.01	2.58
Japan 10-Year (%)	2.77	2.78	2.64	2.39	2.35	1.44

Domestic	3 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	146344	2.34	-5.61	-0.27	50.35
Silver (Rs / Kg)	233858	2.19	-10.60	1.62	117.30
Aluminium (Rs / Kg)	335	1.55	-15.68	-5.80	33.90
Copper (Rs / kg)	1309	2.36	-6.03	11.81	45.14
Lead (Rs / kg)	205	-0.05	-1.56	4.16	10.82
Zinc (Rs /Kg)	369	1.25	-2.88	14.33	41.13
Nickel (Rs / kg)	1582	0.87	-14.05	-3.34	18.35

Global	3 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4112.48	1.08	-8.43	-9.17	22.81
Silver (oz/$)	6060.00	1.00	-19.46	-14.01	66.07
Brent ($/bbl)	72.12	0.45	-26.27	-39.06	4.80
NYMEX crude ($/bbl)	Closed	NA	NA	NA	NA

Upcoming market indicators

Date	Indicator	Previous
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%
July 13	India Inflation Rate, June	3.93%

Global markets

- FTSE index closed higher on Friday, supported by strength in financial and metal miners' stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone S&P Global Services PMI Index increased to 48.9 in June 2026 compared to 47.7 in May 2026, while S&P Global Composite PMI rose to 50.0 from 48.5.
- UK S&P Global Services PMI declined to 48.7 in June 2026 compared to 49.3 in May 2026. Meanwhile, the S&P Global Composite PMI slipped to 49.4 from 49.7.

Commodity

- Brent crude oil rose by 32 cents to $72.12 per barrel due to concerns about potential disruptions to oil supplies around the Strait of Hormuz.
- Domestic gold ended higher due to weakness in the dollar index.

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%