Daily Market Monitor

July 07, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	6 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24430	0.66	4.55	9.40	-4.05
BSE Sensex	78285	0.67	5.44	8.81	-6.17
BSE 100	25974	0.64	4.53	10.97	-2.67
BSE 200	11389	0.63	4.14	12.14	-1.50
BSE 500	36641	0.57	4.27	13.85	-0.88
BSE SmallCap	56537	0.20	5.99	30.82	3.11
BSE MidCap	48076	0.47	3.78	18.60	2.70
BSE LargeCap	9603	0.63	4.24	11.28	-2.07
Sectoral indices					
BSE IT	26575	-0.58	-5.83	-4.84	-30.65
BSE Oil & Gas	26426	0.86	-0.49	3.39	-6.81
BSE FMCG	18699	0.37	4.31	11.47	-7.32
BSE Auto	60447	1.14	4.88	14.89	12.73
BSE Bankex	65942	0.75	7.26	16.55	3.58
BSE Teck	14502	-0.03	-2.72	-1.53	-23.02
BSE Capital Goods	79681	1.19	-0.41	24.03	10.18
BSE Consumer Durable	61419	1.19	4.71	16.72	0.48

Turnover (Rs Cr)	6 July	3 July
BSE Cash	8800	10591
NSE Cash	112696	131654
NSE F&O	20593543	14794101

Rs. Cr (Equity)	FII Inv 3 July	MF Inv 2 July	DII Inv 6 July
Buy	14,171	13,593	19,728
Sell	11,895	12,706	15,936
Net	2,276	887	3,791
Net (MTD)	4,766	3,102	6,781
Net (YTD)	-269,024	301,163	469,366

	6 July	1Day	Month ago	Year ago
USD	95.43	95.24	95.40	85.39
GBP	127.26	127.41	128.11	116.78
Euro	109.01	109.15	110.83	100.60
100 Yen	58.84	59.25	59.64	59.18

Indian markets

- Indian equity benchmarks ended higher on Monday, driven by gains in financial, automobile, realty, and oil and gas stocks, supported by improving foreign fund inflows and optimism over upcoming corporate earnings.
- The top gainers were HDFC Bank, Hindalco Industries, Oil & Natural Gas Corporation, Bajaj Auto, and Mahindra & Mahindra, up 3.42% - 5.82%.
- The top losers were Kotak Mahindra Bank, Max Healthcare Institute, Tata Consultancy Services, Coal India, and Bajaj Finserv, down 1.11% - 3.91%.

Indian debt

- The interbank call-money rate ended lower at 5.25% on Monday compared to 5.28% on Friday.
- Government bond prices ended higher on Monday, supported by strong foreign fund inflows and easing inflation related concern caused by delayed monsoon rains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.69% on Monday compared to 6.71% on Friday.

Indian Rupee

- The spot rupee ended lower against the US dollar on Monday due to a firmer dollar and sustained merchant dollar demand.

Regulatory

- SEBI plans to nearly double the number of stocks eligible for the Securities Lending and Borrowing (SLB) framework, aiming to improve market liquidity and facilitate short-selling.

Economy and Government

- The Uttar Pradesh government has allotted 1,142 hectares of land to defence manufacturing companies, boosting the state's defence industrial ecosystem and supporting domestic defence production.
- India proposed a BRICS virtual working group to combat narcotics trafficking, enhancing cooperation among member countries on transnational security challenges.
- Union Home Minister Amit Shah announced the formation of a Cooperative Life Insurance Company, aimed at expanding insurance penetration through the cooperative network and strengthening access to life insurance services in rural and underserved areas across India.
- The government has eased the compliance requirements for standard weight verification carried out for weighing instruments having at least one tonne capacity.
- Odisha government panel has proposed a project management overhaul for infrastructure projects, recommending stronger monitoring, improved coordination, and faster decision-making to address execution delays and accelerate project completion.

Domestic Debt Market Indicators

Instrument	6 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.25%	5.28%	5.35%	4.75%	7.00%	4.75%
3-Month T-Bill	5.26%	5.22%	5.40%	5.36%	5.40%	5.32%
6-Month T-Bill	5.46%	5.46%	5.65%	5.58%	5.51%	5.48%
1-year T-Bill	5.62%	5.62%	5.93%	5.67%	5.70%	5.53%
3-Month CD	6.40%	6.21%	7.10%	7.00%	7.35%	5.78%
6-Month CD	6.71%	6.69%	7.50%	7.30%	7.30%	6.00%
1-year CD	7.00%	6.95%	7.70%	7.35%	7.25%	6.20%
3-Month CP	6.75%	6.65%	7.75%	7.40%	7.75%	6.20%
6-Month CP	7.05%	7.03%	7.85%	7.70%	7.65%	6.40%
1-year CP	7.40%	7.40%	8.05%	7.75%	7.60%	6.60%
1-year Gilt	5.73%	5.72%	6.01%	5.97%	5.82%	5.57%
3-year Gilt	6.14%	6.18%	6.35%	6.60%	6.43%	5.83%
5-year Gilt	6.38%	6.41%	6.65%	6.83%	6.90%	6.06%
1-year AAA	7.25%	7.22%	7.77%	7.64%	7.57%	6.45%
3-year AAA	7.24%	7.24%	7.63%	7.69%	7.59%	6.63%
5-year AAA	7.26%	7.26%	7.69%	7.72%	7.67%	6.67%
10-year G-sec	6.68%	6.71%	6.98%	7.04%	7.02%	6.30%
Net LAF (Rs Cr)	184898	170007	185817	395331	245161	404417
Forex reserves ($ bn)	666.93	672.59	682.32	688.06	642.49	702.78

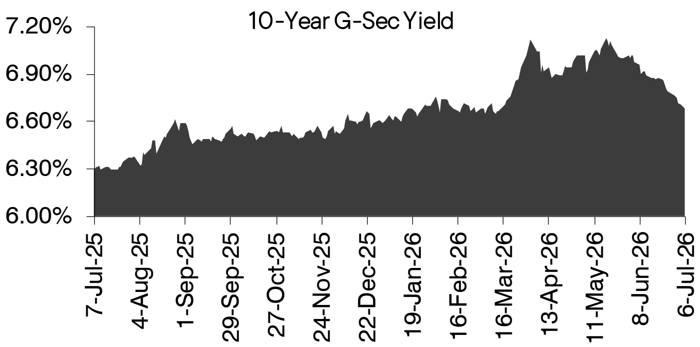
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.46	7.11	7.83	7.91	9.14	9.62
1 Year	5.73	7.25	7.97	8.05	9.28	9.76
3 Year	6.14	7.24	7.96	8.04	9.27	9.75
5 Year	6.38	7.26	8.08	8.16	9.39	9.87
10 Year	6.68	7.37	8.19	8.27	9.50	9.98

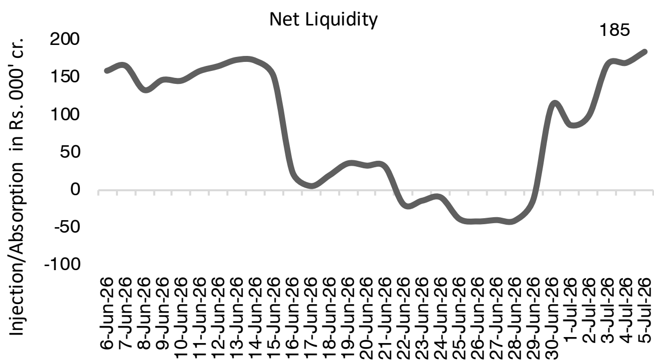
Rs. Cr (Debt)	FII Inv 3 July	MF Inv 2 July
Buy	772	18,467
Sell	329	12,951
Net	442	5,516
Net (MTD)	1,919	13,252
Net (YTD)	31,454	-466,723

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

- Tocal raised Rs 9 crore in funding, which will be used to expand its electric vehicle fleet and fulfilment operations.
- SageOne acquired 19.91 lakh shares (3.2% stake) in Karnika Industries for Rs 18.18 crore, signaling institutional investor confidence in the Kolkata-based textile and apparel manufacturer.
- TANFAC Industries has approved a preferential issue of 7.41 lakh equity shares at Rs 2,341 per share, aggregating Rs 173.5 crore, including a Rs 135 crore investment.
- Embassy Developments has approved raising up to Rs 1,170 crore through additional debentures on a private placement basis.
- Ashok Leyland has partnered with Rosmerta Recycling to provide end-to-end commercial vehicle scrappage services across India.
- Next Bharat Ventures launched a Rs 2,000 crore impact fund to invest in around 50 early-stage startups serving rural and underserved communities, signalling increased capital deployment across sectors such as agriculture, financial inclusion, healthcare and rural mobility in India.





Global market indices	6 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	53055.91	0.29	4.30	14.49	18.35
Nikkei 225	69737.69	-0.01	4.73	36.57	75.17
FTSE	10651.77	-0.26	2.74	4.67	20.73
Hang Seng	23616.32	1.14	-5.39	-4.73	-1.25
Taiwan	46556.39	-0.48	3.30	46.76	106.48

Global debt	6 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.48	4.49	4.55	4.34	4.30	4.35
UK 10-Year (%)	4.80	4.79	4.88	4.85	4.88	4.55
German 10-Year (%)	2.95	2.93	3.04	3.00	3.01	2.57
Japan 10-Year (%)	2.83	2.77	2.67	2.42	2.35	1.44

Domestic	6 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	145583	-0.52	-5.61	-0.78	50.05
Silver (Rs / Kg)	233158	-0.30	-9.24	1.31	116.73
Aluminium (Rs / Kg)	333	-0.43	-13.81	-6.21	33.48
Copper (Rs / kg)	1289	-1.58	-7.16	10.05	43.94
Lead (Rs / kg)	204	-0.66	-2.23	3.47	10.27
Zinc (Rs /Kg)	374	1.30	0.55	15.81	43.57
Nickel (Rs / kg)	1574	-0.49	-12.98	-3.81	18.08

Global	6 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4179.69	1.63	-6.65	-7.69	25.39
Silver (oz/$)	6272.00	3.50	-14.97	-11.00	70.02
Brent ($/bbl)	71.99	-0.18	-22.67	-39.17	5.40
NYMEX crude ($/bbl)	68.55	-0.20	-24.29	-32.38	2.31

Upcoming market indicators

Date	Indicator	Previous
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%
July 14	India WPI Inflation, June	9.68%

Global markets

- Wall Street stocks closed higher on Monday supported by strong gains in chip stocks amid growing optimism over AI-driven earnings growth and favorable deal-related developments in the technology sector.
- 10-year US bond yield ended marginally lower at 4.48% as investors awaited the latest FOMC minutes and developments from the NATO Summit in Turkey.
- FTSE index closed lower on Monday dragged down by decline in precious metal miners and pharmaceutical stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- US S&P Global Services PMI rose to 51.2 in June of 2026 from 50.7 in the previous month while composite PMI increased to 51.9 from 51.5.
- US ISM Services PMI fell to 54.0 in June 2026, down from 54.5 in May.
- Eurozone Construction PMI declined to 42.8 in June 2026 compared to 43.7 in May 2026.
- Eurozone retail sales increased 1.6% year-on-year in May 2026, accelerating compared to a downwardly revised 0.9% growth in April 2026.
- Eurozone producer prices increased 5.9% year-on-year in May 2026, compared to a 5.0% rise in April 2026.
- UK Construction PMI increased to 38.4 in June 2026 compared to 38.2 in May 2026.
- Japan Household spending fell 0.4% in May 2026, compared to a 0.5% decline in April 2026.

Commodity

- Crude oil prices fell by 14 cents to $ 68.55 a barrel on the NYMEX as expectations of higher global supply increased following Saudi Arabia's price cuts and higher OPEC+ production, alongside improved crude oil flows through the Strait of Hormuz.
- Domestic gold prices ended lower due to stronger 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%