Daily Market Monitor

July 08, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	7 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24399	-0.13	4.42	9.26	-4.17
BSE Sensex	78181	-0.13	5.30	8.66	-6.31
BSE 100	25945	-0.11	4.42	10.85	-2.79
BSE 200	11369	-0.17	3.96	11.94	-1.65
BSE 500	36542	-0.27	3.98	13.55	-1.10
BSE SmallCap	56036	-0.89	5.05	29.66	2.53
BSE MidCap	47937	-0.29	3.48	18.25	2.55
BSE LargeCap	9587	-0.17	4.06	11.10	-2.24
Sectoral indices					
BSE IT	27138	2.12	-3.84	-2.82	-28.71
BSE Oil & Gas	26450	0.09	-0.40	3.48	-7.01
BSE FMCG	18695	-0.02	4.28	11.45	-8.71
BSE Auto	60382	-0.11	4.77	14.77	12.78
BSE Bankex	65818	-0.19	7.06	16.33	3.53
BSE Teck	14701	1.37	-1.39	-0.18	-21.62
BSE Capital Goods	78303	-1.73	-2.13	21.89	8.75
BSE Consumer Durable	61818	0.65	5.39	17.48	1.26

Turnover (Rs Cr)	7 July	6 July
BSE Cash	9567	8800
NSE Cash	127892	112696
NSE F&O	62257089	20593543

Rs. Cr (Equity)	FII Inv 6 July	MF Inv 6 July	DII Inv 7 July
Buy	12,826	16,016	18,897
Sell	11,978	12,627	19,281
Net	848	3,389	-383
Net (MTD)	5,614	4,107	6,398
Net (YTD)	-268,176	302,168	468,982

	7 July	1Day	Month ago	Year ago
USD	95.31	95.43	95.40	85.82
GBP	127.55	127.26	128.11	116.76
Euro	108.94	109.01	110.83	100.86
100 Yen	58.83	58.84	59.64	59.15

Indian markets

- Indian equity benchmarks closed lower on Tuesday as investors booked profits amid rising oil prices and renewed geopolitical uncertainties in West Asia.
- The top losers were Trent, Adani Enterprises, Bharat Electronics, Adani Ports and Special Economic Zone, and Max Healthcare Institute, down 1.52-12.64%.
- The top gainers were HCL Technologies, Tech Mahindra, Infosys, SBI Life Insurance Company and Titan Company, up 2.38-3.16%.

Indian debt

- The interbank call-money rate ended flat at 5.25% on Tuesday.
- Government bond prices ended lower on Tuesday, due to gains in US treasury yield while fresh tensions around the US-Iran war added to caution.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 6.70% on Tuesday compared to 6.69% on Monday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Tuesday, supported by strong greenback selling ahead of the release of the minutes of the recent US Federal Reserve meeting.

Regulatory

- According to Reserve Bank of India (RBI) data, NBFC credit growth accelerated to 14.2% YoY in May 2026, driven primarily by strong retail lending demand, highlighting continued momentum in consumer and personal finance segments.
- The Employees' Pension Scheme (EPS) 2026 retains the existing pension framework, including the Rs 1,000 minimum monthly pension and service-linked benefits, while introducing faster claim settlement and enhanced digital compliance, ensuring continuity for EPF subscribers planning retirement income.

Economy and Government

- India and Indonesia discussed strengthening strategic cooperation, including collaboration on Sabang Port and defence projects such as BrahMos and Astra missile systems, enhancing bilateral economic and security ties.
- India and France held their first joint working group meeting on critical minerals, focusing on cooperation in exploration, processing, and recycling. The discussions also addressed efforts to reduce dependence on single supply sources for vital materials.
- Finance Minister Nirmala Sitharaman urged India's toy industry to target a 25% share of the global market in the coming years. She encouraged the sector to leverage supportive government policies and India's trade agreements with economies such as the UAE and Australia.
- The Ministry of Skill Development and Entrepreneurship (MSDE) has approved Rs 1,237 crore investment plans for upgrading ITIs in Odisha, Gujarat, and Telangana, aimed at enhancing vocational training infrastructure and workforce employability.

Domestic Debt Market Indicators

Instrument	7 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.25%	5.25%	5.35%	4.70%	7.00%	4.90%
3-Month T-Bill	5.25%	5.26%	5.40%	5.36%	5.40%	5.33%
6-Month T-Bill	5.45%	5.46%	5.65%	5.61%	5.51%	5.41%
1-year T-Bill	5.63%	5.62%	5.93%	5.64%	5.70%	5.52%
3-Month CD	6.55%	6.40%	7.10%	7.00%	7.35%	5.73%
6-Month CD	6.85%	6.71%	7.50%	7.20%	7.30%	6.00%
1-year CD	7.15%	7.00%	7.70%	7.35%	7.25%	6.16%
3-Month CP	6.90%	6.75%	7.75%	7.40%	7.75%	6.20%
6-Month CP	7.20%	7.05%	7.85%	7.60%	7.65%	6.40%
1-year CP	7.55%	7.40%	8.05%	7.75%	7.60%	6.60%
1-year Gilt	5.78%	5.73%	6.01%	6.02%	5.82%	5.57%
3-year Gilt	6.14%	6.14%	6.35%	6.57%	6.43%	5.81%
5-year Gilt	6.36%	6.38%	6.65%	6.76%	6.90%	6.05%
1-year AAA	7.30%	7.25%	7.77%	7.62%	7.57%	6.45%
3-year AAA	7.29%	7.24%	7.63%	7.67%	7.59%	6.63%
5-year AAA	7.30%	7.26%	7.69%	7.70%	7.67%	6.67%
10-year G-sec	6.70%	6.68%	6.98%	7.04%	7.02%	6.30%
Net LAF (Rs Cr)	119104	184898	185817	401802	245161	343837
Forex reserves ($ bn)	666.93	672.59	682.32	688.06	642.49	702.78

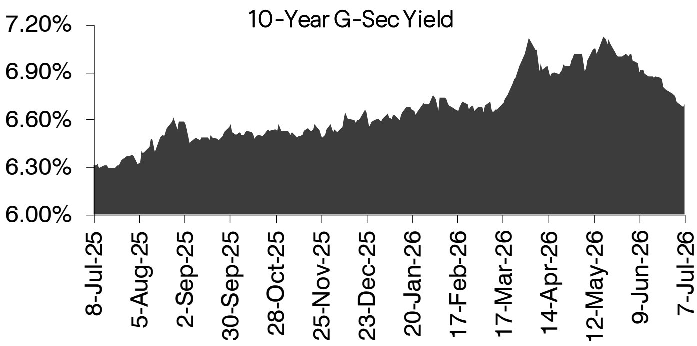
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.16	7.88	7.96	9.19	9.67
1 Year	5.78	7.30	8.02	8.10	9.33	9.81
3 Year	6.14	7.29	8.01	8.09	9.32	9.80
5 Year	6.36	7.30	8.12	8.20	9.43	9.91
10 Year	6.70	7.40	8.22	8.30	9.53	10.01

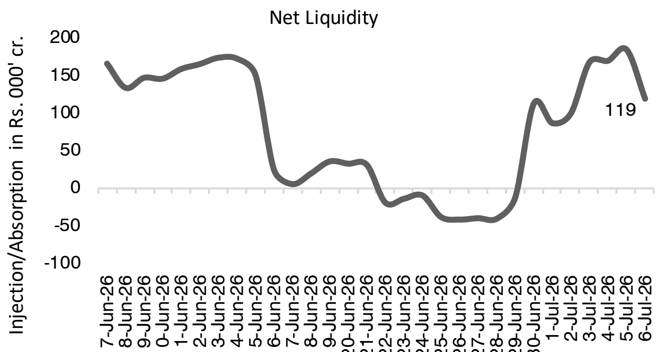
Rs. Cr (Debt)	FII Inv 6 July	MF Inv 6 July
Buy	1,403	16,115
Sell	1,298	26,481
Net	104	-10,367
Net (MTD)	2,024	1,407
Net (YTD)	31,558	-478,569

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

- Premier Energies secured Rs 3,011 crore worth of solar cell and module orders in Q1 FY27, strengthening its order book and revenue visibility amid growing renewable energy demand.
- RITES has secured an international contract worth over $35.8 million from South Africa-based Volantis Asset Finance for the supply and commissioning of diesel-electric locomotives, strengthening its overseas order book and export presence.
- Cult.fit has filed draft papers for an IPO comprising a fresh issue of up to Rs 950 crore and an offer-for-sale of 178.6 million shares.
- Mowito raised $3 million in funding to scale industrial robotics solutions and expand automation capabilities.
- Blurgs AI raised $2.2 million in funding led by Pravega Ventures and Shastra VC, to accelerate global expansion of its AI-powered intelligence platforms for defence, national security, and maritime applications.





Global market indices	7 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52925.15	-0.25	4.05	14.21	19.18
Nikkei 225	68256.96	-2.12	2.51	33.67	72.42
FTSE	10665.88	0.13	2.87	4.81	21.11
Hang Seng	23496.89	-0.51	-5.87	-5.21	-1.64
Taiwan	45479.11	-2.31	0.91	43.36	102.77

Global debt	7 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.55	4.48	4.55	4.33	4.30	4.40
UK 10-Year (%)	4.86	4.80	4.88	4.90	4.88	4.58
German 10-Year (%)	2.99	2.95	3.04	3.08	3.01	2.61
Japan 10-Year (%)	2.84	2.83	2.67	2.39	2.35	1.47

Domestic	7 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	144083	-1.03	-6.58	-1.81	49.16
Silver (Rs / Kg)	227200	-2.56	-11.56	-1.28	113.27
Aluminium (Rs / Kg)	334	0.21	-13.63	-6.01	34.54
Copper (Rs / kg)	1287	-0.09	-7.24	9.95	44.51
Lead (Rs / kg)	206	1.13	-1.13	4.64	12.06
Zinc (Rs /Kg)	376	0.52	1.08	16.42	45.12
Nickel (Rs / kg)	1590	1.02	-12.10	-2.83	20.41

Global	7 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4155.69	-0.57	-7.18	-8.22	24.48
Silver (oz/$)	6190.00	-1.31	-16.08	-12.16	67.61
Brent ($/bbl)	74.16	3.01	-20.34	-37.34	6.58
NYMEX crude ($/bbl)	70.44	2.76	-22.20	-30.52	3.69

Upcoming market indicators

Date	Indicator	Previous
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%
July 15	China GDP Growth Rate YoY Q2	5%

Global markets

- Wall Street stocks closed lower on Tuesday, dragged down by losses in semiconductor stocks amid concerns over the sustainability of the artificial intelligence-driven rally.
- 10-year US bond yield ended ended higher at 4.55% as renewed US air strikes on Iran drove oil prices higher, fueling inflation concerns and reinforcing expectations of interest rate hikes.
- FTSE index closed higher on Tuesday, supported by energy shares following stronger-than-expected second-quarter guidance from Shell.
- Asian markets were trading mostly higher at 8.30 AM.
- US trade deficit widened sharply to $77.6 billion in May 2026 compared to $54.6 billion in April, as imports rose 3.3% to $395.3 billion while exports fell 3.2% to $317.7 billion,
- As per ADP Research Institute data, US private employers added an average of 21,000 jobs per week in the four weeks ending June 20, 2026, a slight decline from the previous period’s 24,250 weekly gain
- US median inflation expectations for one year ahead rose by 0.2 percentage points to 3.7% in June 2026, the highest since September 2023.
- Japan bank lending rose 5.7% year-on-year in June 2026, unchanged from the growth rate recorded in May
- Japan’s Coincident Index increased to 118.1 in April 2026 compared to 116.8 in March 2026 while the leading economic index, rose to 116.8 from 116.1.

Commodity

- Crude oil prices rose by $1.89 to $70.44 a barrel on the NYMEX driven by escalating US-Iran tensions and renewed sanctions that heightened concerns over supply disruptions and inflationary pressures.
- Domestic gold prices ended lower due to strong 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	June-26	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)	43177.36	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%	5.25%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	676.00%	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%
	Call rate	5.45%	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.)	675.274	689.49	700	703	724	696	692	688	699	701	693
	GDP	NA	NA	NA	7.80%	7.80%			7.40%			
	Fiscal deficit (Rs billion)	NA	1623.54	3623.03	2665.2	2712.42	1255.65	NA	3623.03	2665.2	2712.42	1255.65
	IIP, %y/y	NA	5.10%	4.90%	4.10%	5.20%	4.80%	NA	4.90%	4.10%	5.20%	4.80%
	Exports, $ billion	NA	45.2	43.56	38.92	36.61	36.56	NA	43.56	38.92	36.61	36.56
	Imports, $ billion	NA	73.41	71.94	59.59	63.71	71.24	NA	71.94	59.59	63.71	71.24
	Manufacturing PMI	54.2	55.00	54.70	53.90	56.9	55.4	55.00	54.70	53.90	56.9	55.4
	Services PMI	57.4	58.90	58.80	57.5	58.1	58.5	59.80	58.80	57.5	58.1	58.5
	GST collections (Rs crore)	194,812	194,184	242,702	200064	183609	193384	194,184	242,702	200064	183609	193384
	India crude oil import (mbpd)	NA	21.565	20.175	19.00	19.43	21.09	NA	NA	19.00	19.43	21.09
Sector update	Auto – Passenger vehicles	NA	37.62%	26.30%	11.60%	11.10%	11.60%	27.90%	18.59%	17.46%	-6.90%	2.30%
	Auto – Two-wheelers	NA	14.87%	28.40%	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	7.14%	8.70%
	Auto – Commercial vehicles	NA	12.75%	15.00%	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	3.75%	4.60%
	Auto – Tractors	NA	19.59%	26.80%	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	28.30%	8.00%
	Infra – Coal	NA	-9.30%	-8.80%	-4.00%	2.30%	3.10%	3.60%	2.10%	-8.50%	11.40%	-12.30%
	Infra – Electricity	NA	8.70%	5.60%	0.80%	2.30%	5.20%	6.30%	-2.20%	-7.6%	4.1%	3.70%
	Infra – Steel	NA	5.00%	5.50%	7.70%	7.60%	11.50%	10.10%	6.10%	6.70%	13.60%	16.60%
	Infra – Cement	NA	8.40%	8.20%	4.70%	8.90%	11.30%	13.70%	14.50%	5.30%	5.40%	11.60%