Daily Market Monitor

July 10, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	9 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23963	0.34	3.10	7.31	-5.94
BSE Sensex	76742	0.31	3.82	6.66	-8.13
BSE 100	25529	0.48	3.16	9.07	-4.36
BSE 200	11208	0.59	2.95	10.36	-3.05
BSE 500	36087	0.74	3.17	12.13	-2.37
BSE SmallCap	56000	1.77	5.25	29.58	2.18
BSE MidCap	47603	1.35	3.17	17.43	1.88
BSE LargeCap	9440	0.47	2.94	9.39	-3.78
Sectoral indices					
BSE IT	26676	-0.25	-4.00	-4.48	-29.65
BSE Oil & Gas	26016	0.33	-0.78	1.79	-7.58
BSE FMCG	18391	0.94	2.26	9.64	-10.62
BSE Auto	58968	-0.09	2.87	12.08	10.10
BSE Bankex	64789	0.92	4.05	14.51	1.28
BSE Teck	14566	0.51	-1.00	-1.10	-21.90
BSE Capital Goods	77960	0.94	-1.60	21.35	8.06
BSE Consumer Durable	61525	0.94	6.10	16.93	2.03

Turnover (Rs Cr)	9 July	8 July
BSE Cash	11637	10854
NSE Cash	124499	138390
NSE F&O	8977025	11835844

Rs. Cr (Equity)	FII Inv 8 July	MF Inv 6 July	DII Inv 9 July
Buy	24,799	16,016	18,303
Sell	15,310	12,627	16,245
Net	9,489	3,389	2,058
Net (MTD)	16,673	4,107	9,246
Net (YTD)	-257,116	302,168	471,830

	9 July	1Day	Month ago	Year ago
USD	95.37	95.22	95.64	85.80
GBP	128.03	127.25	127.89	116.58
Euro	109.14	108.77	110.47	100.53
100 Yen	58.77	58.73	59.74	58.38

Indian markets

- Indian equity benchmarks closed higher on Thursday, supported by stock-specific buying and optimism surrounding first-quarter earnings prospects.
- The top gainers were Sun Pharmaceutical Industries, Bharti Airtel, Bajaj Finserv, InterGlobe Aviation and Eternal, up 2.01-2.78%.
- The top losers were Dr Reddy's Laboratories, Maruti Suzuki India, Oil & Natural Gas Corporation, Infosys and NTPC, down 1.22-5.77%.

Indian debt

- The interbank call-money rate ended higher at 5.34% on Thursday compared to 5.30% on Wednesday.
- Government bond prices ended higher on Thursday, supported by value buying and continued foreign inflows.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.75% on Thursday compared to 6.76% on Wednesday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Thursday, on likely RBI intervention and intermittent fall in crude oil prices.

Regulatory

- The Reserve Bank of India (RBI) has launched its Inflation Expectations Survey of Households and Rural & Urban Consumer Confidence Surveys across multiple cities to gauge inflation outlook and economic sentiment, with the findings serving as key inputs for future monetary policy decisions and economic assessments.

Economy and Government

- Chief Economic Adviser V. Anantha Nageswaran said the government has already introduced Budget measures to support Global Capability Centres (GCCs) and urged companies to invest in skilling and innovation.
- The Asian Development Bank (ADB) has revised down India’s FY27 GDP growth forecast to 6.6%, citing higher global oil prices and external uncertainties, while continuing to project India as one of the fastest-growing major economies.
- India and Australia have signed a new technology partnership agreement, expanding collaboration in critical technologies, innovation, research, and emerging sectors, reinforcing strategic and economic ties between the two countries.
- India has launched a Letter of Authorization (LoA) regime for high-seas fishing, aimed at boosting seafood exports, improving regulatory oversight, and promoting sustainable marine resource utilization.
- The government waived basic customs duty on key components used in electronics and battery manufacturing, aiming to reduce production costs, strengthen domestic manufacturing competitiveness, and support the growth of India's electronics and EV supply chain.
- The Ministry of Corporate Affairs has extended a special scheme that provides reduced penalties for companies filing financial statements and annual returns after the prescribed deadlines.
- The Central Government has reduced import duties on selected components, inputs, and capital goods used in electronics and battery manufacturing through three customs notifications providing Basic Customs Duty (BCD) exemptions.

Domestic Debt Market Indicators

Instrument	9 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.34%	5.30%	5.27%	5.10%	7.00%	5.00%
3-Month T-Bill	5.27%	5.30%	5.32%	5.26%	5.40%	5.34%
6-Month T-Bill	5.46%	5.46%	5.58%	5.55%	5.51%	5.50%
1-year T-Bill	5.61%	5.64%	5.92%	5.59%	5.70%	5.55%
3-Month CD	6.70%	6.70%	6.85%	6.45%	7.35%	5.72%
6-Month CD	6.85%	7.03%	7.30%	6.85%	7.30%	6.03%
1-year CD	7.20%	7.25%	7.50%	7.00%	7.25%	6.20%
3-Month CP	7.00%	7.05%	7.50%	6.75%	7.75%	6.20%
6-Month CP	7.27%	7.38%	7.65%	7.20%	7.65%	6.40%
1-year CP	7.57%	7.60%	7.90%	7.35%	7.60%	6.65%
1-year Gilt	5.73%	5.82%	6.00%	5.87%	5.82%	5.58%
3-year Gilt	6.20%	6.21%	6.27%	6.37%	6.43%	5.83%
5-year Gilt	6.43%	6.44%	6.51%	6.55%	6.90%	6.08%
1-year AAA	7.39%	7.45%	7.48%	7.42%	7.57%	6.46%
3-year AAA	7.40%	7.37%	7.42%	7.44%	7.59%	6.64%
5-year AAA	7.40%	7.37%	7.49%	7.60%	7.67%	6.68%
10-year G-sec	6.75%	6.77%	6.90%	6.96%	7.02%	6.31%
Net LAF (Rs Cr)	74181	125832	147212	454534	245161	326719
Forex reserves ($ bn)	666.93	672.59	682.32	688.06	642.49	702.78

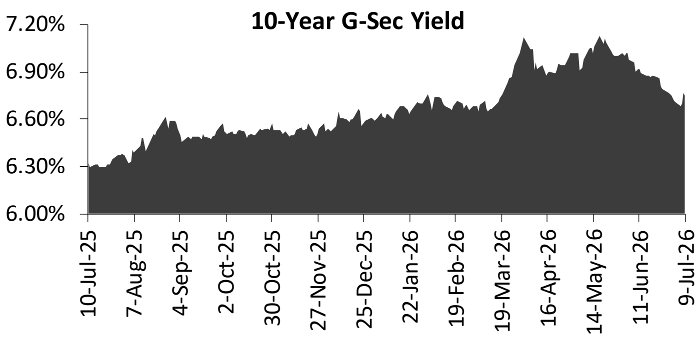
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.46	7.33	8.05	8.13	9.36	9.84
1 Year	5.73	7.39	8.11	8.19	9.42	9.90
3 Year	6.20	7.40	8.12	8.20	9.43	9.91
5 Year	6.43	7.40	8.22	8.30	9.53	10.01
10 Year	6.75	7.44	8.26	8.34	9.57	10.05

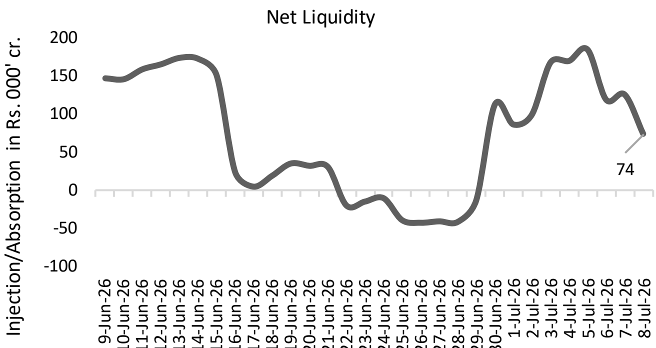
Rs. Cr (Debt)	FII Inv 8 July	MF Inv 6 July
Buy	250	16,115
Sell	507	26,481
Net	-258	-10,367
Net (MTD)	2,332	1,407
Net (YTD)	31,867	-478,569

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*	-0.62% (June 15, 2026)	1.22% (May 31, 2026)	
Bank Deposit Growth*	0.14% (June 15, 2026)	1.55% (May 31, 2026)	

Capital markets

- Nalco and NLC India have formed a 50:50 joint venture to invest Rs 12,000 crore in a 1,080 MW captive thermal power plant in Odisha, securing long-term energy supply for Nalco's aluminium expansion and supporting its future growth plans.
- Natco Pharma announced a Rs 2,500 crore investment plan in South Africa, including a stake increase in Adcock Ingram to 49%, strengthening its expansion strategy across South Africa and the broader African pharmaceutical market.
- The Fundamentum Partnership launched Fundamentum Fund III with a corpus of Rs 2,200 crore to support growth-stage startups in India.
- IBS Group launched Naviq Technology, with a planned investment of $500 million (around Rs 4,800 crore) over the next five years.
- Insolation Energy wholly owned subsidiary secured a Rs 558.29 crore solar PV module supply contract from NTPC Renewable Energy.
- SBI Funds Management has priced its Rs 11,693 crore IPO initial public offering (IPO) between Rs 545 and Rs 574 per share.





TATA mutual fund

Global market indices	9 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52487.41	0.27	3.18	13.26	18.06
Nikkei 225	67743.85	1.38	3.56	32.67	70.12
FTSE	10472.45	-0.16	2.40	2.91	18.11
Hang Seng	24030.18	-0.70	-2.18	-3.06	0.58
Taiwan	45354.61	-0.83	1.45	42.97	101.33

Global debt	9 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.54	4.56	4.53	4.29	4.30	4.34
UK 10-Year (%)	4.90	4.96	4.92	4.76	4.88	4.60
German 10-Year (%)	3.05	3.09	3.06	3.01	3.01	2.63
Japan 10-Year (%)	2.88	2.88	2.68	2.38	2.35	1.51

Domestic	9 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	143656	0.92	-5.81	-2.10	49.51
Silver (Rs / Kg)	223794	1.01	-9.00	-2.76	108.61
Aluminium (Rs / Kg)	341	0.19	-11.87	-4.18	36.61
Copper (Rs / kg)	1289	1.40	-5.17	10.10	45.62
Lead (Rs / kg)	206	1.00	-0.79	4.51	12.69
Zinc (Rs /Kg)	380	1.81	1.96	17.72	46.15
Nickel (Rs / kg)	1591	-0.03	-11.26	-2.77	21.47

Global	9 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4072.66	-1.78	-6.15	-10.05	23.05
Silver (oz/$)	5817.00	-4.50	-15.01	-17.45	59.11
Brent ($/bbl)	76.30	-2.20	-16.57	-35.53	8.70
NYMEX crude ($/bbl)	72.08	-1.96	-18.28	-28.90	5.41

Upcoming market indicators

Date	Indicator	Previous
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%
July 16	Uk GDP, May	1.2%

Global markets

- Wall Street stocks ended higher on Thursday buoyed by gains in semiconductors and technology stocks.
- US 10yr yield ended lower at 4.54% as investors worried about economic growth.
- FTSE index ended lower on Thursday following disappointing earnings result from a major company.
- Asian markets were trading mostly higher at 8.30 AM.
- US initial jobless claims fell by 2,000 to 215,000 in the week ended July 4, 2026 compared to 217,000 in the previous period, indicating continued resilience in the US labor market.
- Japan machine tool orders surged 52.8% in June 2026, compared to a 37.4% increase in May 2026.
- Japan's producer prices rose 7.1% on year in June 2026, accelerating from an upwardly revised 6.6% increase in May 2026.

Commodity

- Crude oil prices fell by $1.44 to $72.08 a barrel on the NYMEX as concerns that rising inflation and other economic growth worries could weigh on global oil demand.
- Domestic gold ended higher due to rising safe haven demand amid worries over global economic growth.

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*

TATA mutual fund

	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	42826.35	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	689.48975	700	703	724	696	692	688	699	701	693
	GDP	NA	NA	NA	7.80%			7.80%			8.40%	
	Fiscal deficit (Rs billion)	NA	1623.54	3623.03	2665.2	2712.42	1255.65	-1208.29	1515.27	2520.21	-250.3	1297.37
	IIP, %y/y	NA	5.10%	4.90%	4.10%	5.20%	4.80%	8.00%	7.20%	0.50%	4.60%	4.10%
	Exports, $ billion	NA	45.2	43.56	38.92	36.61	36.56	38.51	38.13	34.38	36.38	35.1
	Imports, $ billion	NA	73.41	71.94	59.59	63.71	71.24	63.55	62.66	76.06	68.53	61.59
	Manufacturing PMI	54.2	55.00	54.70	53.90	56.9	55.4	55	56.6	59.2	57.7	59.3
	Services PMI	57.4	58.90	58.80	57.5	58.1	58.5	58	59.8	58.8	60.9	62.9
	GST collections (Rs crore)	194,812	194,184	242,702	200064	183609	193384	174550	170276	195936	189017	186315
	India crude oil import (mbpd)	NA	21.565	20.175	19.39	20.13	21.09	21.59	21.24	21.01	20.21	19.60
Sector update	Auto – Passenger vehicles	NA	37.62%	26.30%	11.60%	11.10%	11.60%	27.90%	18.59%	17.46%	0.20%	-6.90%
	Auto – Two-wheelers	NA	14.87%	28.40%	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%
	Auto – Commercial vehicles	NA	12.75%	15.00%	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%
	Auto – Tractors	NA	19.59%	26.80%	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%
	Infra – Coal	NA	-9.30%	-8.80%	-4.00%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%
	Infra – Electricity	NA	8.70%	5.60%	0.80%	2.30%	5.20%	6.30%	-2.20%	-7.6%	2.1%	4.1%
	Infra – Steel	NA	5.00%	5.50%	7.70%	7.60%	11.50%	10.10%	6.10%	6.70%	14.10%	13.60%
	Infra – Cement	NA	8.40%	8.20%	4.70%	8.90%	11.30%	13.70%	14.50%	5.30%	5.30%	5.40%