Daily Market Monitor

July 13, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	10 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24207	1.02	4.27	8.40	-4.53
BSE Sensex	77569	1.08	4.85	7.81	-6.76
BSE 100	25798	1.05	4.56	10.22	-2.94
BSE 200	11337	1.14	4.65	11.62	-1.56
BSE 500	36506	1.16	5.00	13.44	-0.90
BSE SmallCap	56676	1.21	7.88	31.14	3.29
BSE MidCap	48400	1.67	6.36	19.40	3.88
BSE LargeCap	9539	1.05	4.39	10.54	-2.39
Sectoral indices					
BSE IT	27212	2.01	-1.24	-2.56	-27.72
BSE Oil & Gas	26323	1.18	2.20	2.99	-6.53
BSE FMCG	18409	0.09	1.50	9.74	-10.12
BSE Auto	59410	0.75	4.50	12.92	11.08
BSE Bankex	65688	1.39	5.85	16.10	3.03
BSE Teck	14714	1.01	1.05	-0.09	-20.17
BSE Capital Goods	79102	1.46	1.29	23.13	10.12
BSE Consumer Durable	62003	0.78	7.83	17.83	3.27

Turnover (Rs Cr)	10 July	9 July
BSE Cash	9740	11637
NSE Cash	122158	124499
NSE F&O	14447608	8977025

Rs. Cr (Equity)	FII Inv 9 July	MF Inv 6 July	DII Inv 10 July
Buy	15,736	16,016	17,172
Sell	15,471	12,627	15,152
Net	265	3,389	2,020
Net (MTD)	16,938	4,107	11,265
Net (YTD)	-256,851	302,168	473,850

	10 July	1Day	Month ago	Year ago
USD	95.31	95.37	95.19	85.58
GBP	128.03	128.03	127.46	116.50
Euro	109.08	109.14	109.96	100.47
100 Yen	59.02	58.77	59.35	58.52

Indian markets

- Indian equity benchmarks closed higher on Friday, supported by positive global cues, easing crude oil prices and optimism surrounding the upcoming earnings season for the first quarter of fiscal 2027.
- The top gainers were Jio Financial Services, HDFC Life, Adani Enterprises, Reliance and State Bank of India, up 2.29-3.90%.
- The top losers were Dr Reddys Labs, Eternal, Bharti Airtel, Nestle India and Sun Pharmaceuticals, down 0.30-1.19%.

Indian debt

- The interbank call-money rate ended higher at 5.35% on Friday compared to 5.34% on Thursday.
- Government bond prices ended higher on Friday, due to strong demand at the weekly debt auction, and sustained foreign inflows driven by expectations of Indian government bonds being included in Bloomberg's Global Aggregate Index.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.71% on Friday compared to 6.75% on Thursday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Friday, supported by softer crude oil prices and foreign fund inflows.

Regulatory

- The RBI has stepped up scrutiny of overseas investments by Indian companies, intensifying monitoring of outbound foreign direct investment (OFDI) transactions to ensure compliance with foreign exchange regulations and assess associated financial risks.
- Sebi has permitted mutual funds to use intraday borrowing facilities to manage short-term liquidity mismatches arising from differences in market settlement timings. The new framework will come into effect on September 1, 2026.
- PFRDA has constituted the ASCEND (Advisory Committee for Systematic Capital Expansion and NPS Development) Committee to attract global pension fund participation in the National Pension System (NPS), with the objective of strengthening long-term infrastructure financing, deepening capital markets, and expanding investment and diversification opportunities for NPS subscribers.

Economy and Government

- The World Bank Group has approved an $890 million financing package for India's PM Surya Ghar rooftop solar programme, with the initiative expected to mobilise an additional $4.2 billion in private investment.
- India's foreign exchange reserves rose to $674.19 billion as of July 3, compared with $ 666.93 billion in the previous week.
- The Government of India has finalized arrangements for uranium imports from Australia, strengthening long-term fuel security for its nuclear energy programme and supporting the target of expanding nuclear power capacity to 100 GW by 2047, a key component of India's clean energy strategy.
- DGFT has notified the procedure for claiming tariff-rate quota (TRQ) benefits under the India–UK Comprehensive Economic and Trade Agreement (CETA), enabling eligible vehicle importers to avail of reduced customs duties of up to 10% from July 15, thereby facilitating trade and improving market access.

Domestic Debt Market Indicators

Instrument	10 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.34%	5.20%	4.75%	7.00%	4.90%
3-Month T-Bill	5.28%	5.27%	5.28%	5.26%	5.40%	5.32%
6-Month T-Bill	5.45%	5.46%	5.55%	5.55%	5.51%	5.48%
1-year T-Bill	5.61%	5.61%	5.88%	5.59%	5.70%	5.54%
3-Month CD	6.70%	6.70%	6.85%	6.15%	7.35%	5.75%
6-Month CD	6.87%	6.85%	7.30%	6.80%	7.30%	6.00%
1-year CD	7.15%	7.20%	7.50%	7.00%	7.25%	6.21%
3-Month CP	7.00%	7.00%	7.50%	6.51%	7.75%	6.20%
6-Month CP	7.27%	7.27%	7.65%	7.15%	7.65%	6.35%
1-year CP	7.57%	7.57%	7.90%	7.35%	7.60%	6.65%
1-year Gilt	5.81%	5.73%	5.95%	5.86%	5.82%	5.56%
3-year Gilt	6.16%	6.20%	6.34%	6.35%	6.43%	5.81%
5-year Gilt	6.38%	6.43%	6.57%	6.53%	6.90%	6.08%
1-year AAA	7.34%	7.39%	7.38%	7.37%	7.57%	6.46%
3-year AAA	7.37%	7.40%	7.39%	7.44%	7.59%	6.64%
5-year AAA	7.37%	7.40%	7.47%	7.60%	7.67%	6.68%
10-year G-sec	6.71%	6.75%	6.94%	6.92%	7.02%	6.32%
Net LAF (Rs Cr)	110894	74181	146007	554023	245161	315352
Forex reserves ($ bn)	674.19	666.93	682.32	697.12	642.49	702.78

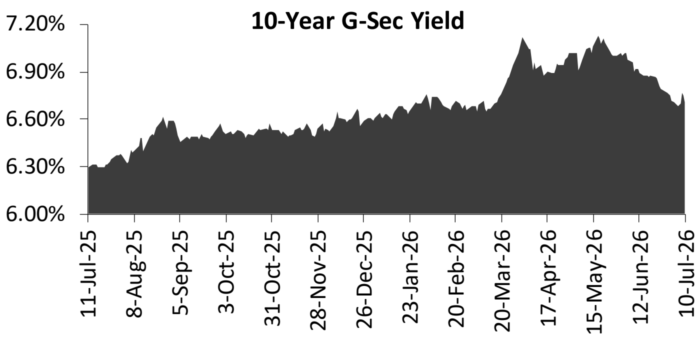
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.29	8.01	8.09	9.32	9.80
1 Year	5.81	7.34	8.06	8.14	9.37	9.85
3 Year	6.16	7.37	8.09	8.17	9.40	9.88
5 Year	6.38	7.37	8.19	8.27	9.50	9.98
10 Year	6.71	7.41	8.23	8.31	9.54	10.02

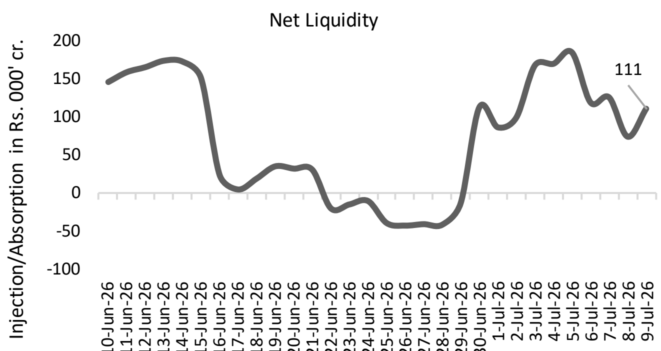
Rs. Cr (Debt)	FII Inv 9 July	MF Inv 6 July
Buy	207	16,115
Sell	589	26,481
Net	-383	-10,367
Net (MTD)	1,950	1,407
Net (YTD)	31,484	-478,569

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

- Quant Mutual Fund acquired 7 lakh shares (2.6% stake) in Ethos for Rs 175 crore, reflecting strong institutional interest in the luxury watch retailer and confidence in its growth prospects.
- Sebi has approved the IPO proposals of Tonbo Imaging India, Marri Retail, Zetwerk, and Gujarat Victory Forgings, further expanding the pipeline of companies preparing to access the primary market.
- State Bank of India to sell a 1.42% stake in asset management unit SBI Funds Management to 30 investors for Rs 1,655 crore ($173.5 million) in a pre-IPO placement.
- Apollo Micro Systems acquired a 41.33% stake in Premier Explosives for about Rs 1,550 crore, strengthening its presence in defence, space and energetic materials.
- HFCL bagged an export order worth Rs 495.8 crore from an international data centre company for supplying optical fibre cable.





TATA mutual fund

Global market indices	10 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52637.01	0.29	5.45	13.59	17.89
Nikkei 225	68557.73	1.20	6.82	34.26	72.92
FTSE	10497.29	0.24	2.36	3.15	16.95
Hang Seng	24175.12	0.60	-0.95	-2.47	0.61
Taiwan	Closed	NA	NA	NA	NA

Global debt	10 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.56	4.54	4.55	4.31	4.30	4.35
UK 10-Year (%)	4.89	4.90	4.95	4.84	4.88	4.60
German 10-Year (%)	3.03	3.05	3.07	3.05	3.01	2.66
Japan 10-Year (%)	2.77	2.88	2.69	2.45	2.35	1.49

Domestic	10 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	143368	-0.20	-2.57	-2.29	47.73
Silver (Rs / Kg)	220390	-1.52	-5.53	-4.23	104.19
Aluminium (Rs / Kg)	339	-0.40	-9.42	-4.56	35.93
Copper (Rs / kg)	1305	1.25	-1.58	11.47	47.16
Lead (Rs / kg)	206	-0.27	-1.13	4.24	11.90
Zinc (Rs /Kg)	379	-0.37	3.71	17.29	44.59
Nickel (Rs / kg)	1606	0.94	-8.33	-1.85	21.23

Global	10 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4131.90	1.45	-3.06	-8.74	24.73
Silver (oz/$)	6032.00	3.70	-7.39	-14.40	65.76
Brent ($/bbl)	76.01	-0.38	-18.36	-35.78	10.75
NYMEX crude ($/bbl)	71.41	-0.93	-20.68	-29.56	7.27

Upcoming market indicators

Date	Indicator	Previous
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%
July 17	Eurozone Inflation Rate YoY Final, June	3.2%

Global markets

- Wall Street stocks ended higher on Friday buoyed by gains in AI-related stocks.
- 10-year US bond yield ended higher at 4.56% due to uncertainty around geopolitical tensions.
- FTSE index ended higher on Friday due to gains in communications stocks.
- Asian markets were trading mostly higher at 8.30 AM.

Commodity

- Crude oil prices declined by 67 cents to $71.41 a barrel on the NYMEX as investors grew optimistic about a potential easing in US-Iran tensions and the eventual resumption of shipping through the Strait of Hormuz.
- Domestic gold prices ended lower due to weak demand.

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	689	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%