Daily Market Monitor

July 14, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	13 July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24211	0.02	2.49	8.42	-3.73
BSE Sensex	77616	0.06	2.77	7.88	-5.92
BSE 100	25798	0.00	2.82	10.22	-2.11
BSE 200	11333	-0.03	2.94	11.59	-0.75
BSE 500	36509	0.01	3.30	13.44	-0.10
BSE SmallCap	56835	0.28	6.13	31.51	4.31
BSE MidCap	48477	0.16	5.08	19.59	4.72
BSE LargeCap	9533	-0.06	2.64	10.47	-1.63
Sectoral indices					
BSE IT	28163	3.49	3.66	0.85	-23.94
BSE Oil & Gas	26324	0.00	0.66	2.99	-5.32
BSE FMCG	18257	-0.82	0.65	8.84	-11.25
BSE Auto	59592	0.31	2.90	13.26	13.37
BSE Bankex	65784	0.15	2.81	16.27	3.44
BSE Teck	14975	1.77	2.79	1.68	-17.23
BSE Capital Goods	78454	-0.82	-0.56	22.12	10.55
BSE Consumer Durable	62367	0.59	6.74	18.53	4.83

Turnover (Rs Cr)	13 July	10 July
BSE Cash	24211	0.02
NSE Cash	77616	0.06
NSE F&O	25798	0.00

Rs. Cr (Equity)	FII Inv 10 July	MF Inv 6 July	DII Inv 13 July
Buy	16,656	16,016	17,393
Sell	13,499	12,627	15,222
Net	3,157	3,389	2,172
Net (MTD)	20,095	4,107	13,437
Net (YTD)	-253,694	302,168	476,022

	13 July	1Day	Month ago	Year ago
USD	95.83	95.31	95.38	85.85
GBP	128.30	128.03	127.84	116.29
Euro	109.30	109.08	110.36	100.29
100 Yen	59.07	59.02	59.50	58.45

Indian markets

- Indian equity benchmarks closed flat on Monday as gains in IT stocks following strong quarterly earnings were offset by losses amid the escalating West Asia conflict.
- The top gainers were Tata Consultancy Services, HCL Technologies, Infosys, Tech Mahindra, and Bajaj Auto, up 2.50-5.51%.
- The top losers were Grasim Industries, Tata Steel, Nestle India, Eternal, and InterGlobe Aviation, down 1.45-2.73%.

Indian debt

- The interbank call-money rate ended lower at 5.30% on Monday compared to 5.35% on Friday.
- Government bond prices ended lower on Monday, as rising oil prices and inflation concerns stemming from the US-Iran conflict outweighed hopes of Bloomberg index inclusion.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 6.73% on Monday compared to 6.71% on Friday.

Indian Rupee

- The spot rupee closed lower against the US dollar on Monday following renewed uncertainty around the West Asia conflict.

Regulatory

- The Securities and Exchange Board of India (SEBI) has tightened employee conduct and conflict-of-interest norms by introducing a two-year cooling-off period for former employees, expanding disclosure requirements, and restricting direct equity investments.

Economy and Government

- India retail inflation accelerated to 4.38% in June compared to 3.93% in May, driven by higher transportation and food prices amid rising energy costs and sharp increases in prices of items such as ginger and tomatoes.
- India's merchandise trade deficit widened to a record high of $30.43 billion in June from $19.12 billion a year earlier, as imports surged 31% to $70.84 billion on higher energy costs amid Middle East tensions, while exports rose 15.5% to $40.4 billion.
- Union Road Transport and Highways Minister Nitin Gadkari said Uttar Pradesh will receive road infrastructure projects worth Rs 5 lakh crore over the next two years, significantly strengthening connectivity, logistics efficiency, and regional economic development.
- Finance Minister Nirmala Sitharaman has urged banks to enhance NRI outreach efforts to sustain momentum in foreign currency mobilisation and support stable overseas deposit inflows.
- Commerce Minister Piyush Goyal said that India and the United States remain fully engaged in negotiations for a bilateral trade agreement, with both sides continuing discussions to resolve outstanding issues and deepen economic ties.
- The government has launched the EPFO Amnesty Scheme 2026 for PF trusts, providing eligible establishments an opportunity to regularize compliance-related issues and streamline provident fund administration.

Domestic Debt Market Indicators

Instrument	13 July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.30%	5.35%	5.20%	5.10%	7.00%	5.00%
3-Month T-Bill	5.29%	5.28%	5.27%	5.28%	5.40%	5.38%
6-Month T-Bill	5.45%	5.45%	5.49%	5.49%	5.51%	5.52%
1-year T-Bill	5.61%	5.61%	5.85%	5.59%	5.70%	5.56%
3-Month CD	6.70%	6.70%	6.86%	6.09%	7.35%	5.75%
6-Month CD	6.95%	6.87%	7.33%	6.80%	7.30%	6.00%
1-year CD	7.15%	7.15%	7.60%	6.97%	7.25%	6.21%
3-Month CP	7.10%	7.00%	7.40%	6.51%	7.75%	6.20%
6-Month CP	7.35%	7.27%	7.68%	7.17%	7.65%	6.35%
1-year CP	7.60%	7.57%	8.00%	7.35%	7.60%	6.65%
1-year Gilt	5.75%	5.81%	6.01%	5.87%	5.82%	5.58%
3-year Gilt	6.18%	6.16%	6.20%	6.41%	6.43%	5.82%
5-year Gilt	6.41%	6.38%	6.49%	6.56%	6.90%	6.08%
1-year AAA	7.38%	7.34%	7.44%	7.39%	7.57%	6.46%
3-year AAA	7.37%	7.37%	7.39%	7.46%	7.59%	6.64%
5-year AAA	7.37%	7.37%	7.47%	7.62%	7.67%	6.68%
10-year G-sec	6.73%	6.71%	6.89%	6.94%	7.02%	6.30%
Net LAF (Rs Cr)	114776	114843	165541	524481	245161	331620
Forex reserves ($ bn)	674.19	666.93	681.61	697.12	642.49	699.74

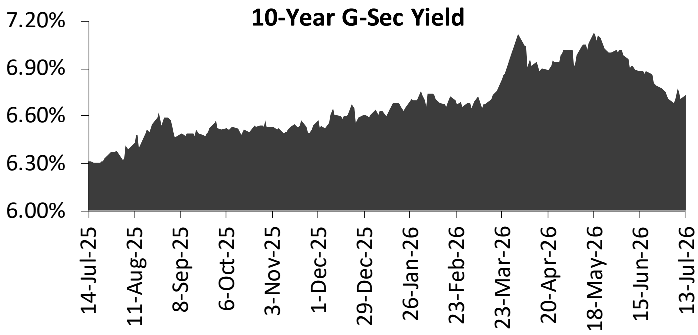
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.31	8.03	8.11	9.34	9.82
1 Year	5.75	7.38	8.10	8.18	9.41	9.89
3 Year	6.18	7.37	8.09	8.17	9.40	9.88
5 Year	6.41	7.37	8.19	8.27	9.50	9.98
10 Year	6.73	7.41	8.23	8.31	9.54	10.02

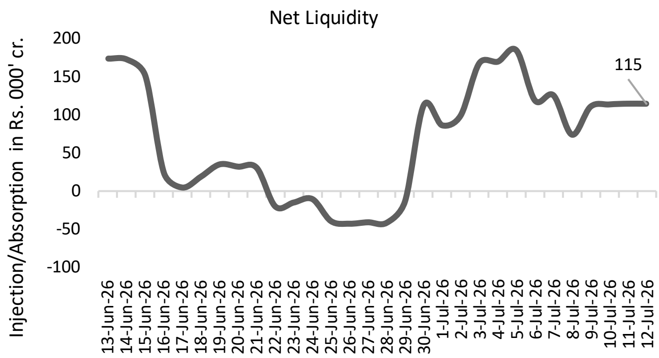
Rs. Cr (Debt)	FII Inv 10 July	MF Inv 6 July
Buy	726	16,115
Sell	427	26,481
Net	300	-10,367
Net (MTD)	2,249	1,407
Net (YTD)	31,784	-478,569

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

- Aditya Birla Renewables (ABReN) approved the acquisition of 100% stake in Solenergi Power Pvt. Ltd. from Shell Overseas Investment BV for Rs 17,200 crore.
- HCLTech plans to invest Rs 3,500 crore in its data centre business, expanding digital infrastructure capacity and strengthening its cloud and AI ecosystem capabilities.
- EAAA Alternatives acquired NHAI toll road assets worth Rs 2,259 crore under the Toll-Operate-Transfer (TOT) programme, reflecting continued investor interest in India's infrastructure asset monetisation initiatives.
- Tata Capital has entered the gold loan business through the acquisition of an 88.6% stake in Kerala-based Yogloans for Rs 318 crore, expanding its secured lending portfolio and strengthening its retail finance franchise.





TATA mutual fund

Global market indices	13 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52498.64	-0.26	2.53	13.29	18.32
Nikkei 225	67242.73	-1.92	1.85	31.68	69.93
FTSE	10498.29	0.01	0.25	3.16	17.42
Hang Seng	24213.72	0.16	-2.04	-2.32	0.31
Taiwan	45380.52	0.06	2.74	43.05	99.47

Global debt	13 July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.62	4.56	4.48	4.30	4.30	4.43
UK 10-Year (%)	4.99	4.89	4.84	4.85	4.88	4.63
German 10-Year (%)	3.07	3.03	3.00	3.09	3.01	2.69
Japan 10-Year (%)	2.78	2.77	2.64	2.47	2.35	1.50

Domestic	13 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	142188	-0.82	-3.80	-3.10	45.82
Silver (Rs / Kg)	218722	-0.76	-9.84	-4.96	98.32
Aluminium (Rs / Kg)	341	0.59	-9.39	-4.00	36.38
Copper (Rs / kg)	1307	0.17	-2.87	11.66	47.96
Lead (Rs / kg)	204	-0.61	-2.92	3.60	11.64
Zinc (Rs /Kg)	379	0.15	2.49	17.46	45.13
Nickel (Rs / kg)	1607	0.02	-6.70	-1.83	21.48

Global	13 July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4095.36	-0.88	-0.06	-9.55	22.18
Silver (oz/$)	5934.00	-1.62	-7.19	-15.79	54.57
Brent ($/bbl)	83.30	9.59	-4.61	-29.62	18.39
NYMEX crude ($/bbl)	78.14	9.42	-7.94	-22.92	14.16

Upcoming market indicators

Date	Indicator	Previous
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%
July 18	India Infrastructure Output, June	0.5%

Global markets

- Wall Street stocks closed lower on Monday dragged down by technology stocks amid escalating US-Iran tensions following the announcement of blockade on Iranian ports.
- 10-year US bond yield ended higher at 4.56% due to resurfacing inflation worries amid escalating US-Iran conflicts.
- FTSE index closed flat on Monday as gains in energy stocks driven by rising oil prices offset weakness in financials and mining stocks amid renewed US-Iran tensions.
- Asian markets were trading mostly higher at 8.30 AM.
- UK's BRC retail sales rose by 1.7% year-on-year in June slowing from a 3.4% increase in May.
- China's trade surplus widened to $125.62 billion in June 2026 from $113.89 billion in the same period of 2025.
- China's exports jumped 27.0% on year in June from 19.4% in May while imports surged 36.0% from a 27.4% growth in May.

Commodity

- Crude oil prices rose by $ 6.73 to $78.14 a barrel on the NYMEX as escalating US-Iran conflict and the closure of the Strait of Hormuz disrupted key global supply routes, intensifying supply concerns.
- Domestic gold prices ended lower due to strength in 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*

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	6.76%	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%