



Domestic Market Performance

Indian market indices	01-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25011	0.24	3.60	44.07	26.74
S&P BSE Sensex	81868	0.15	3.01	38.78	23.18
S&P BSE 100	26457	0.07	3.54	50.31	31.46
S&P BSE 200	11577	-0.02	3.58	56.69	35.42
S&P BSE 500	37133	-0.11	3.45	60.33	37.25
S&P BSE SmallCap	54946	-0.70	3.77	103.83	56.19
S&P BSE MidCap	48248	-0.80	3.38	100.48	58.97
S&P BSE LargeCap	9798	0.17	3.48	48.82	30.78
Sectoral indices					
S&P BSE IT	41482	-0.54	10.24	45.66	35.62
S&P BSE Oil & Gas	32755	0.59	10.86	88.43	68.92
S&P BSE FMCG	22524	0.07	8.65	36.62	18.88
S&P BSE Auto	59715	-0.78	3.81	111.40	66.20
S&P BSE Bankex	58830	-0.06	-1.71	27.80	14.61
S&P BSE Teck	19042	-0.24	9.35	46.72	38.16
S&P BSE Capital Goods	74751	-1.18	2.78	117.49	70.39
S&P BSE Consumer Durable	60601	-0.54	2.11	61.05	41.93

Turnover (Rs Cr)	01-Aug	31-Jul
BSE Cash	9,430	8,737
NSE Cash	135,582	136,355
NSE F&O	43,170,977	56,238,970

Rs. Cr (Equity)	FII Inv 31-Jul	MF Inv 30-Jul	DII Inv 01-Aug
Buy	21,330	11,243	13,956
Sell	24,184	6,992	14,293
Net	-2,854	4,252	-337
Net (MTD)	27,958	18,386	-337
Net (YTD)	30,616	201,925	261,587

	01-Aug	1Day	Month ago	Year ago
USD	83.72	83.72	83.44	82.25
GBP	106.80	107.44	105.74	105.58
Euro	90.24	90.65	89.78	90.27
100 Yen	55.83	55.66	51.81	57.69

Indian markets

- Indian equities ended at a record high on Thursday after the US Federal Reserve kept the interest rates unchanged, hinting at a potential rate cut in September.
- The top gainers were Power Grid Corporation, Coal India, ONGC, Dr Reddy's Labs and Shriram Finance, up 1.95-3.70%.
- The top losers were Mahindra & Mahindra, Hero Motocorp, Tata Steel, State Bank of India and Tata Motors, down 1.06-2.73%.

Indian debt

- The interbank call money rate ended lower at 5.90% on Thursday compared to 6.50% on Wednesday.
- Government bond prices ended marginally higher on Thursday due to a fall in US Treasury yields, after the Fed chair Powell hinted to begin rate-easing cycle in September.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended marginally lower at 6.92% on Thursday compared to 6.93% on Wednesday.

Indian Rupee

- The rupee ended flat against the US dollar on Thursday as losses due to weak Chinese yuan and dollar demand from local importers were trimmed on reports of intervention by RBI.

Regulatory

- The Reserve Bank released rules to be carried out for Aadhaar-enabled Payment System (AePS) touchpoint operators by lenders, in order to prevent frauds.
- As per data released by the National Payments Corporation of India (NPCI), UPI transaction value was at Rs 20.07 lakh cr in June and Rs 20.44 lakh cr in May.

Economy and Government

- India HSBC Manufacturing PMI edged down to 58.1 in July 2024 from 58.3 in June.
- India's goods and services tax (GST) collections rose 10.3% to a three-month high of Rs 1.82 lakh cr in July as compared to Rs 1.74 lakh cr in June.
- The telecom department made OTP verification through phone numbers optional for foreign nationals visiting India and seeking an Indian mobile connection.

Domestic Debt Market Indicators

Instrument	01-Aug	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.90%	6.50%	6.24%	6.70%	5.50%	6.00%
3-Month T-Bill	6.63%	6.67%	6.80%	6.97%	6.83%	6.71%
6-Month T-Bill	6.76%	6.77%	6.91%	7.02%	7.13%	6.85%
1-year T-Bill	6.77%	6.78%	6.93%	7.06%	7.18%	6.87%
3-Month CD	7.19%	7.19%	7.06%	7.20%	7.00%	6.95%
6-Month CD	7.41%	7.43%	7.40%	7.14%	7.37%	7.14%
1-year CD	7.60%	7.60%	7.62%	7.68%	7.60%	7.37%
3-Month CP	7.64%	7.65%	7.72%	7.60%	7.35%	7.20%
6-Month CP	7.75%	7.80%	7.90%	7.35%	7.71%	7.35%
1-year CP	7.91%	7.91%	7.95%	7.95%	7.90%	7.70%
1-year Gilt	6.78%	6.79%	6.96%	7.04%	7.14%	6.88%
3-year Gilt	6.82%	6.83%	6.97%	7.19%	7.16%	7.09%
5-year Gilt	6.83%	6.85%	7.02%	7.20%	7.19%	7.13%
1-year AAA	7.64%	7.64%	7.68%	7.62%	7.70%	7.50%
3-year AAA	7.58%	7.58%	7.62%	7.78%	7.70%	7.59%
5-year AAA	7.52%	7.52%	7.55%	7.62%	7.70%	7.52%
10-year G-sec	6.92%	6.92%	7.01%	7.20%	7.31%	7.16%
Net LAF (Rs Cr)	155618	125353	58121	-103107	104121	220907
Forex reserves (\$ bn)	670.86	666.85	653.71	640.33	578.78	607.04

Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.76	7.55	8.29	8.34	9.63	10.03
1 Year	6.78	7.64	8.38	8.43	9.72	10.12
3 Year	6.82	7.58	8.32	8.37	9.66	10.06
5 Year	6.83	7.52	8.37	8.42	9.71	10.11
10 Year	6.92	7.40	8.25	8.30	9.59	9.99

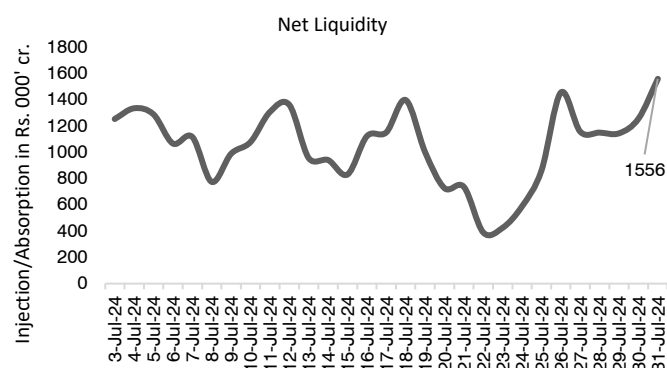
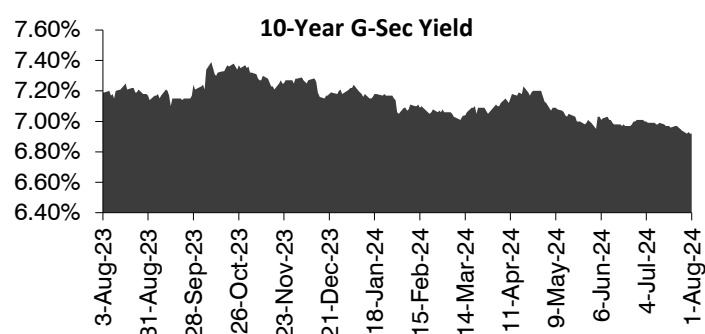
Rs. Cr (Debt)	FII Inv 31-Jul	MF Inv 30-Jul
Buy	6,437	3,408
Sell	4,730	3,213
Net	1,708	195
Net (MTD)	21,864	-4,893
Net (YTD)	88,781	-160,031

Economic Indicators	Latest	Quarter	Year Ago
CPI	5.08% (Jun-24)	4.85% (Mar-24)	4.87% (Jun-23)
WPI	3.36% (Jun-24)	0.53% (Mar-24)	-4.12% (Jun-23)
IIP	5.9% (May-24)	5.6% (Feb-24)	5.7% (May-23)
GDP	7.8% (Jan-Mar FY24)	8.4% (Oct-Dec FY24)	6.1% (Jan-Mar FY23)
India Manufacturing PMI	58.1 (Jul-24)	58.8 (Apr-24)	57.7 (Jul-23)
India Service PMI	61.1* (Jul-24)	60.8 (Apr-24)	62.3 (Jul-23)

*Flash

Capital markets

- Brainbees Solution fixed a price band of Rs 440-465 for its upcoming Rs 4,194 cr initial public offering (IPO) which will open from August 6 to 8.
- Ola Electric has raised Rs 2,763 cr from marquee anchor investors ahead of its IPO.
- Rubicon Research has filed its draft prospectus with the SEBI for Rs 1085 cr IPO.
- Paras Healthcare filed Draft Prospectus with SEBI for Rs 700-900 cr IPO.
- Hero MotoCorp filed its draft prospectus with the SEBI to raise funds through an IPO.
- Clix Capital has raised Rs 220 cr in fresh equity capital.



Global market indices	01-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	40348	-1.21	3.01	21.26	13.24
Nikkei 225	38126	-2.49	-3.80	35.96	13.89
FTSE	8283	-1.01	1.43	8.54	8.05
Hang Seng	17305	-0.23	-2.33	-15.17	-13.52
Taiwan	22642	1.99	-1.81	42.69	31.54

Global debt	01-Aug	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	3.99	4.09	4.48	4.68	3.49	4.05
UK 10-Year (%)	3.89	3.97	4.32	4.41	3.49	4.43
German 10-Year (%)	2.25	2.30	2.60	2.59	2.30	2.52
Japan 10-Year (%)	0.99	1.05	1.06	0.89	0.33	0.59

Domestic	01-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	69721	0.59	-3.00	16.69	17.27
Silver (Rs / Kg)	83464	0.59	-4.94	16.60	12.35
Aluminium (Rs / Kg)	213	0.85	-8.97	0.21	3.15
Copper (Rs / kg)	803	0.41	-4.65	3.14	6.47
Lead (Rs / kg)	194	-0.77	-2.19	1.92	1.15
Zinc (Rs /Kg)	257	0.51	-6.53	-1.00	11.87
Nickel (Rs / kg)	1382	0.09	-5.75	-30.94	-25.32

Global	01-Aug	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2445.76	1.51	5.18	1.51	24.53
Silver (oz/\$)	2905.00	2.51	-0.31	2.51	19.01
Brent (\$/bbl)	79.52	-1.63	-8.18	-1.63	-6.35
NYMEX crude (\$/bbl)	76.31	-2.05	-8.48	-2.05	-6.22

Upcoming market indicators

Date	Indicator	Previous
August 02	US Non farm payrolls, July	206,000
August 05	US ISM Services PMI, July	48.8
August 08	India RBI Interest Rate Decision	6.50%
August 09	China Inflation Rate, July	0.2%
August 12	US Consumer Inflation Expectations, July	3%

Global markets:

- Wall Street stocks ended lower on Thursday fueled by concerns of a economic slowdown following a rise in jobless claims and a contraction in ISM manufacturing activity.
- 10-year US bond yield fell to 3.99% following a surge in jobless claims.
- FTSE index closed lower on Thursday driven by losses in the financial sector after the Bank of England cut interest rates, while maintaining a cautious approach to further cuts.
- Asian markets were trading higher at 8.30 AM.
- US S&P Global Manufacturing PMI came at 49.6 in July, from 51.6 in June.
- US ISM Manufacturing PMI fell to 46.8 in July, from 48.5 in the previous month.
- US Initial Jobless Claims rose by 14,000 to 249,000 in the period ending July 27, from 235,000 in previous week.
- Eurozone HCOB Manufacturing PMI was unchanged at 45.8 in July, from June.
- Eurozone unemployment rate edged up to 6.5% in June, from 6.4% in May.
- The Bank of England lowered its Bank Rate by 25 bps to 5% in its August meeting, but noted that it will move cautiously in loosening monetary policy further until officials are more certain that inflation will remain subdued.
- UK Nationwide House Price Index rose by 2.1% in July compared to a 1.5% increase in June.
- UK S&P Global Manufacturing PMI rose to 52.1 in July compared to 50.9 in June.

Commodity

- Crude oil prices fell \$1.60 to \$76.31 a barrel on the NYMEX on expectations that geopolitical tensions likely to have no impact on supply.
- Domestic gold prices ended higher on improved domestic demand and as investors await US jobs data.

Forthcoming results

Date	Company
August 02	Titan Company Ltd.
August 02	Hindustan Zinc Ltd.
August 02	Britannia Industries Ltd.
August 03	State Bank of India
August 03	Divi's Laboratories Ltd.
August 05	Bharti Airtel Ltd.
August 05	Oil And Natural Gas Corporation Ltd.
August 05	Marico Ltd.
August 02	Titan Company Ltd.
August 02	Hindustan Zinc Ltd.

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

	Indicators	June-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24	Dec-23	Nov-23	Oct-23	Sep-23
Debt Indicators	Currency in circulation (Rs billion)	35,814	35,792	35,455	34,849	34,342	33,902	33,636	33,335	32,971	33,092
	Repo rate	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%	7.18%	7.28%	7.35%	7.21%
	Call rate	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%	6.25%	6.65%	6.60%	6.60%
	Forex reserves (\$ billion; mthly. avg.)	653	644	644	633	618	619	609	591	585	594
Economy	GDP	NA			7.80%			8.60%			8.10%
	Fiscal deficit (Rs billion)	NA	-1595.21	2101.36	1523.05	3987.63	1203.24	756.94	1028.84	1018.39	590.35
	IIP, %y/y	NA	NA	5.00%	5.40%	5.60%	4.20%	4.40%	2.50%	11.90%	6.40%
	Exports, \$ billion	NA	38.13	34.99	41.68	41.4	36.92	38.45	33.9	33.57	34.47
	Imports, \$ billion	NA	61.91	54.09	57.28	60.11	54.41	58.25	54.48	65.03	53.84
	Manufacturing PMI	58.3	57.5	58.8	59.1	56.9	56.5	54.9	56	55.5	57.5
	Services PMI	60.5	60.2	60.8	61.2	60.6	61.8	59	56.9	58.4	61
	GST collections (Rs crore)	NA	172,739	210,267	178,484	168,337	172,129	164,882	167,929	172,003	162,712
	India crude oil import (mbpd)	NA	21.75	21.44	20.69	18.01	21.39	19.54	18.57	18.53	17.5
Sector update	Auto – Passenger vehicles	NA	20.50%	35.40%	9.74%	-5.40%	-1.32%	3.70%	-10.10%	1.84%	2.40%
	Auto – Two-wheelers	NA	1.09%	22.78%	15.27%	34.60%	26.20%	16.00%	31.30%	1.84%	0.80%
	Auto – Commercial vehicles	NA	-0.10%	14.40%	-7.74%	-4.20%	-4.40%	-10.00%	3.30%	11.54%	8.10%
	Auto – Tractors	NA	0.00%	-3.00%	-23.05%	-17.00%	-15.30%	-19.80%	6.40%	-4.28%	-14.70%
	Banks – Deposit growth	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%	13.10%	13.40%	13.63%	13%
	Banks – Credit growth	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%	20.30%	20.80%	20.64%	20%
	Infra – Coal	NA	10.20%	7.50%	8.70%	11.60%	10.20%	10.70%	10.90%	18.40%	16.10%
	Infra – Electricity	NA	12.80%	9.40%	8.00%	7.50%	5.20%	1.20%	5.70%	20.30%	9.30%
	Infra – Steel	NA	7.60%	7.10%	5.50%	9.10%	7.00%	7.60%	9.40%	10.70%	9.60%
	Infra – Cement	NA	-0.80%	0.60%	10.60%	9.10%	5.60%	3.80%	-4.00%	17.40%	4.70%

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