

Domestic Market Performance

Indian market indices	12- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23883	-1.07	-4.33	37.58	22.95
BSE Sensex	78675	-1.03	-3.33	33.37	21.22
BSE 100	25195	-1.18	-4.89	43.14	26.10
BSE 200	10967	-1.17	-5.32	48.42	28.12
BSE 500	35162	-1.18	-5.49	51.82	28.76
BSE SmallCap	53604	-1.26	-5.29	98.85	39.67
BSE MidCap	45268	-0.98	-6.54	88.10	39.00
BSE LargeCap	9268	-1.21	-5.21	40.76	25.27
Sectoral indices					
BSE IT	42387	-0.03	-1.03	48.84	35.65
BSE Oil & Gas	26805	-1.12	-11.12	54.20	39.77
BSE FMCG	20876	-1.60	-7.68	26.62	10.86
BSE Auto	52630	-1.95	-11.84	86.32	41.84
BSE Bankex	58328	-1.45	0.11	26.71	17.64
BSE Teck	19225	-0.04	-2.74	48.13	37.03
BSE Capital Goods	67768	-2.14	-5.33	97.17	42.04
BSE Consumer Durable	60673	-1.24	-7.52	61.24	34.77

Turnover (Rs Cr)	12- Nov	11- Nov
BSE Cash	5535	6837
NSE Cash	90244	91098
NSE F&O	48437114	23921566

Rs. Cr (Equity)	FII Inv 11- Nov	MF Inv 08- Nov	DII Inv 12- Nov
Buy	11,605	8,546	10,330
Sell	11,970	7,278	8,476
Net	-364	1,269	1,854
Net (MTD)	-23,911	9,573	17,895
Net (YTD)	-19,415	370,379	467,213

	12- Nov	1Day	Month ago	Year ago
USD	84.39	84.39	84.07	83.34
GBP	108.23	108.88	109.89	101.83
Euro	89.69	90.21	91.98	89.00
100 Yen	54.77	54.88	56.45	55.04

Indian markets

- Indian equities ended lower on Tuesday pressured by banking, financial and auto stocks amid weak corporate earnings.
- The top losers were Britannia, Bharat Electronics, NTPC, HDFC Bank and Asian Paints, down 2.68-7.49%.
- The top gainers were Trent, Infosys, Sun Pharma, HCL Technologies and Reliance Industries, up 0.12-0.74%.

Indian debt

- The interbank call money rate closed higher at 5.75% on Tuesday compared to 5.50% on Monday.
- Government bond prices closed marginally lower on Tuesday as investors wait for fresh cues, while the spike in local inflation data diminished the hopes of future rate cuts by RBI.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed marginally higher at 6.83% on Tuesday 6.82% on Monday.
- Meanwhile, the new 10-year benchmark 06.79% GS 2034 paper closed at 6.80% on Tuesday.

Indian Rupee

- The rupee closed almost flat against the US dollar on Tuesday due to strong dollar Index and persistent foreign fund outflows.

Regulatory

- SEBI extended the deadline for public comments till November 26 on the proposal concerning requirements for recognition as specified digital platforms (SDPs).
- The Securities and Exchange Board of India (Sebi) announced the simplification of the registration process for foreign portfolio investors (FPIs) through an abridged version of the application form, with certain fields auto-populated for several categories of FPIs.

Economy and Government

- India 's Industrial production rose 3.1% on-year in September rebounding from a 0.1% contraction in August while the manufacturing production increased 3.9% from an upwardly revised 1.1%.
- India annual inflation rate increased to 6.21% in October compared to 5.49% in SeptemberThe Union Finance Ministry said that the aggregate business of public sector banks (PSBs) showed strong growth of 11% in the first half (April-September) of the financial year 2024-25, reaching Rs 236 trillion.
- India has imposed an anti-dumping duty of up to \$ 557 per tonne on a chemical used mainly in the adhesive industry from China, Korea, and Thailand for five years to guard domestic players from cheap imports from these nations.
- Rakesh Kumar Verma, Additional Secretary, Department of Water Resources said the government has proposed the Integrated Water Resources Management Authority (IWRM) at the state level, which will coordinate and integrate efforts of multiple water-related departments and agencies.
- Union government raised the Dearness Allowance for the employees of the central government and central autonomous bodies who withdraw salaries as per the pre-revised pay scale of the 6th Central Pay Commission and 5th Central Pay Commission.

Domestic Debt Market Indicators

Instrument	12- Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.50%	5.85%	5.75%	5.50%	6.70%
3-Month T-Bill	6.44%	6.46%	6.42%	6.61%	6.83%	6.92%
6-Month T-Bill	6.60%	6.58%	6.52%	6.70%	7.13%	7.06%
1-year T-Bill	6.55%	6.56%	6.52%	6.72%	7.18%	7.14%
3-Month CD	7.17%	7.17%	7.10%	7.15%	7.00%	7.30%
6-Month CD	7.42%	7.38%	7.35%	7.55%	7.37%	7.55%
1-year CD	7.50%	7.50%	7.46%	7.61%	7.60%	7.70%
3-Month CP	7.45%	7.45%	7.43%	7.63%	7.35%	7.75%
6-Month CP	7.71%	7.75%	7.70%	7.85%	7.71%	7.85%
1-year CP	7.79%	7.79%	7.80%	7.91%	7.90%	8.00%
1-year Gilt	6.70%	6.71%	6.57%	6.75%	7.14%	7.16%
3-year Gilt	6.72%	6.72%	6.65%	6.76%	7.16%	7.26%
5-year Gilt	6.77%	6.76%	6.69%	6.79%	7.19%	7.32%
1-year AAA	7.59%	7.57%	7.59%	7.64%	7.70%	7.62%
3-year AAA	7.35%	7.35%	7.41%	7.58%	7.70%	7.70%
5-year AAA	7.30%	7.30%	7.31%	7.51%	7.70%	7.70%
10-year G-sec	6.80%	6.79%	6.79%	6.88%	7.31%	7.30%
Net LAF (Rs Cr)	198705	226221	180160	112620	104121	-41142
Forex reserves (\$ bn)	682.13	684.81	701.18	674.92	578.78	590.78

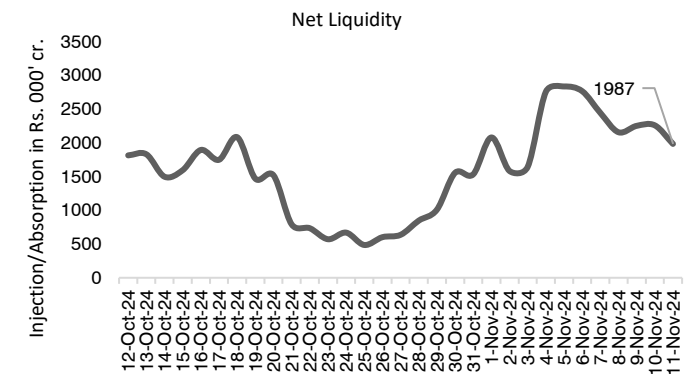
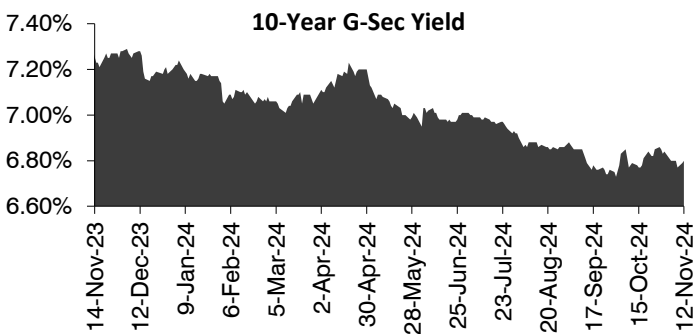
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.60	7.53	8.27	8.32	9.61	10.01
1 Year	6.70	7.59	8.33	8.38	9.67	10.07
3 Year	6.72	7.35	8.09	8.14	9.43	9.83
5 Year	6.77	7.30	8.15	8.20	9.49	9.89
10 Year	6.80	7.17	8.02	8.07	9.36	9.76

Rs. Cr (Debt)	FII Inv 11- Nov	MF Inv 08- Nov
Buy	373	10,840
Sell	262	10,064
Net	110	776
Net (MTD)	531	-3,992
Net (YTD)	102,458	-281,203

Economic Indicators	Latest	Quarter	Year Ago
CPI	6.21% (Oct-24)	3.54% (Jul-24)	4.87% (Oct-23)
WPI	1.84% (Sep-24)	3.36% (Jun-24)	-0.26% (Sep-23)
IIP	3.1% (Sep-24)	4.2% (Jun-24)	5.8% (Sep-23)
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)
India Manufacturing PMI	57.5 (Oct-24)	58.1 (Jul-24)	55.5 (Oct-23)
India Service PMI	58.5 (Oct-24)	60.3 (Jul-24)	58.4 (Oct-23)

Capital markets

- The National Stock Exchange (NSE) and BSE announced the rollback of the direct payout of securities to client demat accounts, which was enabled on November 11.
- Nisus Finance Services received Bombay Stock Exchange approval for its IPO, offering 65 lakh equity shares.
- DesignX raised pre-series A funding from Piper Serica Angel Fund.
- Physis Capital raised Rs 150 cr for Rs 400 cr fund, to invest in startups.
- Rosmerta Digital Services plans to raise over Rs 206 crore through an initial public offering (IPO).
- Inventurus Knowledge Solutions and Manjushree Technopack received a go-ahead from the Securities and Exchange Board of India (SEBI) to raise funds through initial public offerings (IPOs).
- Funstop Games raised \$5 million in its Series A funding.



Global market indices	12- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43910.98	-0.86	2.44	31.97	28.08
Nikkei 225	39376.09	-0.40	-0.58	40.42	20.90
FTSE	8025.77	-1.22	-2.76	5.16	9.04
Hang Seng	19846.88	-2.84	-6.61	-2.71	15.37
Taiwan	22981.77	-2.33	0.35	44.83	37.76

Global debt	12- Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.43	4.30	4.08	3.90	3.49	4.63
UK 10-Year (%)	4.50	4.42	4.21	3.92	3.49	4.33
German 10-Year (%)	2.35	2.32	2.27	2.23	2.30	2.71
Japan 10-Year (%)	1.03	0.99	0.96	0.85	0.33	0.85

Domestic	12- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	74900	-2.52	-0.96	25.35	24.34
Silver (Rs / Kg)	88252	-2.87	-1.90	23.29	25.33
Aluminium (Rs / Kg)	237	-1.90	-0.94	11.69	15.02
Copper (Rs / kg)	814	-1.81	-3.10	4.60	15.71
Lead (Rs / kg)	186	-1.51	-5.42	-2.29	-1.92
Zinc (Rs /Kg)	277	-2.52	-4.57	6.65	19.91
Nickel (Rs / kg)	1362	-0.48	-8.84	-31.93	-9.37

Global	12- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2611.24	-2.74	-0.82	-2.74	33.31
Silver (oz/\$)	3052.00	-2.52	-2.02	-2.52	34.81
Brent (\$/bbl)	71.89	0.08	-9.05	0.08	-11.72
NYMEX crude (\$/bbl)	68.12	0.12	-9.85	0.12	-11.73

Upcoming market indicators

Date	Indicator	Previous
November 14	US PPI YoY, October	1.8%
November 14	US PPI YoY, October	1.8%
November 14	India WPI Inflation YoY, October	1.84%
November 15	US Retail Sales YoY	1.7%
November 15	UK GDP Growth Rate YoY	0.7%

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

Global markets:

- Wall Street stocks ended lower on Tuesday as investors booked profits from post election gains while waiting for inflation data which is due this week.
- 10-year US bond yield ended higher at 4.43% in anticipation of new fiscal policy.
- FTSE index declined on Tuesday amid worries over US-China trade conflicts and dismal corporate earnings.
- Asian markets were trading mixed at 8.30 AM.
- US NFIB Small Business Optimism Index increased to 93.7 in October 2024, the highest in three months, compared to 91.5 in September.
- US consumer inflation expectations for the year ahead edged down to 2.9% in October 2024, the lowest since October 2020, from 3% in each of the previous four months.
- Eurozone ZEW Economic Sentiment Index decreased to 12.50 in November from 20.10 in October.
- UK unemployment rate rose to 4.3% from July to September compared to 4% in the previous three-month period.

Commodity

- Crude oil prices rose 8 cents to \$68.12 a barrel on the NYMEX due to short covering at lower level.
- OPEC expects world oil demand to rise by 1.82 million barrels per day in 2024, down from growth of 1.93 million bpd it expected last month. OPEC also cut its 2025 global demand growth estimate to 1.54 million bpd from 1.64 million bpd.
- Domestic gold prices ended lower on profit booking at higher level and strong dollar index.

Forthcoming results

Date	Company
NA	NA

	Indicators	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24	Feb-24	Jan-24
Debt Indicators	Currency in circulation (Rs billion)	35,042	34,994	35,231	35,600	35,814	35,792	35,455	34,849	34,342	33,902
	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	6.85%	6.75%	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%	7.08%	7.14%
	Call rate	5.75%	6.24%	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%	6.50%	6.75%
	Forex reserves (\$ billion; mthly. avg.)	696.1895	689	674	662	653	644	644	633	618	619
Economy	GDP	NA	NA	NA	NA	6.70%			7.80%		
	Fiscal deficit (Rs billion)	NA	NA	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24
	IIP, %y/y	NA	NA	NA	4.80%	4.20%	5.90%	5.00%	5.40%	5.60%	4.20%
	Exports, \$ billion	NA	34.58	34.71	33.98	35.2	38.13	34.99	41.68	41.4	36.92
	Imports, \$ billion	NA	55.36	64.36	57.48	56.18	61.91	54.09	57.28	60.11	54.41
	Manufacturing PMI	57.5	56.5	57.5	58.1	58.3	57.5	58.8	59.1	56.9	56.5
	Services PMI	58.5	57.7	60.9	60.3	60.5	60.2	60.8	61.2	60.6	61.8
	GST collections (Rs crore)	187,346	173,240	174,962	182,075	173,813	172,739	210,267	178,484	168,337	172,129
	India crude oil import (mbpd)	NA		19.10	19.44	18.45	21.75	21.44	20.69	18.01	21.39
Sector update	Auto – Passenger vehicles	NA	-3.1%	-2.8%	-1.74%	4.30%	20.50%	35.40%	9.74%	-5.40%	-1.32%
	Auto – Two-wheelers	NA	15.8%	9.6%	12.45%	21.30%	1.09%	22.78%	15.27%	34.60%	26.20%
	Auto – Commercial vehicles	NA	-22.02%	-11.63%	-12.29%	-8.30%	-0.10%	14.40%	-7.74%	-4.20%	-4.40%
	Auto – Tractors	NA	3.7%	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%	-17.00%	-15.30%
	Banks – Deposit growth	11.80%	11.60%	10.90%	11.30%	11.80%	13.30%	12.50%	13.70%	13.10%	13.60%
	Banks – Credit growth	11.70%	13.00%	13.50%	13.90%	19.30%	19.50%	19.10%	19.10%	20.41%	20.30%
	Infra – Coal	NA	NA	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%
	Infra – Electricity	NA	NA	-5.00%	7.00%	7.70%	12.80%	9.40%	8.00%	7.50%	5.20%
	Infra – Steel	NA	NA	4.50%	7.20%	2.70%	7.60%	7.10%	5.50%	9.10%	7.00%
	Infra – Cement	NA	NA	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%

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