

Domestic Market Performance

Indian market indices	13- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23559	-1.36	-5.63	35.71	21.17
BSE Sensex	77691	-1.25	-4.53	31.70	19.65
BSE 100	24828	-1.46	-6.28	41.06	24.08
BSE 200	10789	-1.62	-6.85	46.01	25.73
BSE 500	34534	-1.79	-7.18	49.11	26.05
BSE SmallCap	51953	-3.08	-8.21	92.72	33.85
BSE MidCap	44108	-2.56	-8.94	83.28	34.40
BSE LargeCap	9132	-1.46	-6.59	38.70	23.26
Sectoral indices					
BSE IT	42071	-0.75	-1.77	47.73	34.39
BSE Oil & Gas	26327	-1.78	-12.70	51.45	36.77
BSE FMCG	20738	-0.66	-8.29	25.78	10.07
BSE Auto	51443	-2.26	-13.83	82.12	37.90
BSE Bankex	57199	-1.94	-1.83	24.26	15.19
BSE Teck	19119	-0.55	-3.28	47.32	36.08
BSE Capital Goods	65928	-2.72	-7.90	91.82	37.46
BSE Consumer Durable	60146	-0.87	-8.32	59.84	33.84

Turnover (Rs Cr)	13- Nov	12- Nov
BSE Cash	6889	5535
NSE Cash	101536	90244
NSE F&O	67167267	48437114

Rs. Cr (Equity)	FII Inv 12- Nov	MF Inv 11- Nov	DII Inv 13- Nov
Buy	18,653	6,760	14,095
Sell	15,809	6,122	7,950
Net	2,843	638	6,145
Net (MTD)	-21,068	10,211	24,041
Net (YTD)	-16,571	371,016	473,358

	13- Nov	1Day	Month ago	Year ago
USD	84.38	84.39	84.07	83.33
GBP	107.60	108.23	109.89	102.02
Euro	89.69	89.69	91.98	89.07
100 Yen	54.51	54.77	56.45	54.94

Indian markets

- Indian equities ended extended fall on Wednesday amid persistent FII outflows and dismal corporate earnings.
- The top losers were Hero MotoCorp, Hindalco, Tata Steel, M&M and Eicher Motors, down 3.16-4.33%.
- The top gainers were Britannia, Infosys, NTPC, Tata Motors and HUL, up 0.14-0.38%.

Indian debt

- The interbank call money rate closed higher at 6.60% on Wednesday compared to 5.75% on Tuesday.
- Government bond prices ended flat on Wednesday as losses owing to rise in US treasury yields were cut short as rising domestic inflation dimmed RBI rate cut hopes.
- The yield of the new 10-year benchmark 06.79% GS 2034 paper ended flat at 6.80% on Wednesday.

Indian Rupee

- The rupee closed lower against the US dollar on Wednesday due to strong persistent foreign fund outflows and tracking the decline in domestic equities.

Regulatory

- The Reserve Bank of India (RBI) has clarified that customers can complete the re-KYC process through self-declaration if there is no change in their Know Your Customer (KYC) information.
- Sebi proposed raising the maximum investment limit by an angel fund in a startup to Rs 25 crore, a move that can provide a boost to the new-age technology companies.
- SEBI proposed norms to specify responsibilities for its registered entities, such as mutual funds, stockbrokers, and market infrastructure institutions (MIIs), regarding the use of artificial intelligence and machine learning (AI/ML) tools.
- SEBI proposed changes to the regulatory framework for custodians, including doubling their minimum net worth requirement.

Economy and Government

- India's Chief Economic Advisor (CEA) V. Anantha Nageswaran emphasised that India needs to enhance its investment appeal regardless of political changes in the United States, focusing on internal economic reforms and scaling up enterprise growth.
- Prime Minister Narendra Modi inaugurated and laid the foundation stones of development projects worth Rs 12,100 cr in Bihar's Darbhanga
- The Centre released new guidelines to regulate misleading advertisements by coaching institutes, prohibiting false claims like 100% selection or 100% job security.
- The mines ministry entered into a pact with the International Energy Agency (IEA) for cooperation in the area of critical minerals.

Domestic Debt Market Indicators

Instrument	13- Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.60%	5.75%	5.85%	5.75%	5.50%	6.75%
3-Month T-Bill	6.44%	6.44%	6.42%	6.60%	6.83%	6.92%
6-Month T-Bill	6.59%	6.60%	6.52%	6.69%	7.13%	7.05%
1-year T-Bill	6.58%	6.55%	6.52%	6.71%	7.18%	7.13%
3-Month CD	7.16%	7.17%	7.10%	7.15%	7.00%	7.30%
6-Month CD	7.42%	7.42%	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%	7.71%	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	6.72%	6.70%	6.57%	6.74%	7.14%	7.16%
3-year Gilt	6.72%	6.72%	6.65%	6.76%	7.16%	7.26%
5-year Gilt	6.77%	6.77%	6.69%	6.79%	7.19%	7.31%
1-year AAA	7.59%	7.59%	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%	6.80%	6.79%	6.88%	7.31%	7.28%
Net LAF (Rs Cr)	205389	198705	180160	125502	104121	-54319
Forex reserves (\$ bn)	682.13	684.81	701.18	674.92	578.78	590.78

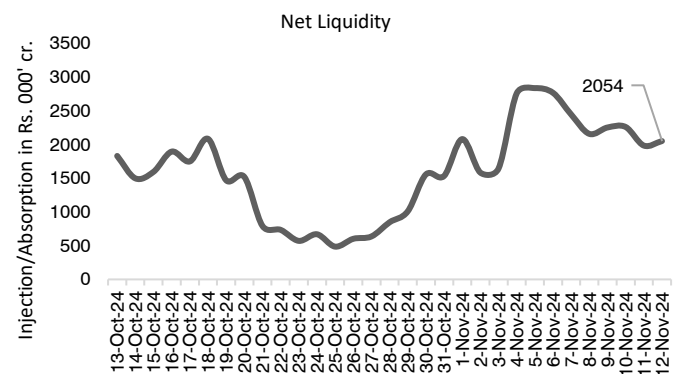
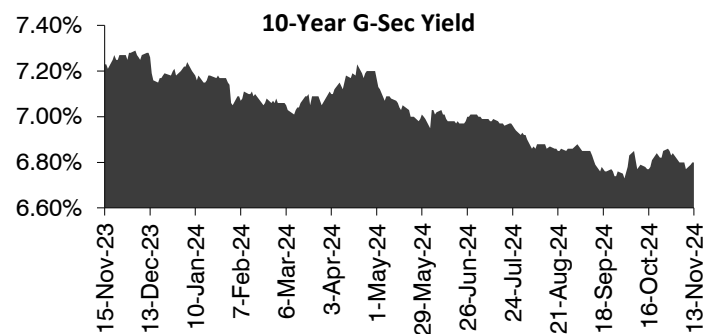
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.59	7.53	8.27	8.32	9.61	10.01
1 Year	6.72	7.59	8.33	8.38	9.67	10.07
3 Year	6.72	7.35	8.09	8.14	9.43	9.83
5 Year	6.77	7.30	8.15	8.20	9.49	9.89
10 Year	6.80	7.17	8.02	8.07	9.36	9.76

Rs. Cr (Debt)	FII Inv 12- Nov	MF Inv 11- Nov
Buy	570	9,312
Sell	933	10,756
Net	-363	-1,444
Net (MTD)	168	-5,436
Net (YTD)	102,095	-282,647

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

- NSE discontinues weekly expiries for Bank Nifty.
- BlueGreen Ventures launched a maiden \$75 million, about Rs 633 crore, fund for investment in early-stage startups.
- Blue Energy Motors to raise \$100 million by January to fund capacity expansion.
- Tata Communications divest its entire 100% stake to Transaction Solutions International (India) (TSI) in a deal valued at Rs 330 cr.
- NBCC has bagged a Rs 263-crore contract in Kanpur from the Income Tax Department.



Global market indices	13- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43958.19	0.11	2.55	32.11	28.02
Nikkei 225	38721.66	-1.66	-2.23	38.09	18.83
FTSE	8030.33	0.06	-2.71	5.22	8.14
Hang Seng	19823.45	-0.12	-6.72	-2.83	13.76
Taiwan	22860.23	-0.53	-0.18	44.06	35.76

Global debt	13- Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.44	4.43	4.08	3.85	3.49	4.44
UK 10-Year (%)	4.52	4.50	4.21	3.89	3.49	4.52
German 10-Year (%)	2.38	2.35	2.27	2.18	2.30	2.38
Japan 10-Year (%)	1.05	1.03	0.96	0.83	0.33	1.05

Domestic	13- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	75260	0.48	-0.48	25.96	25.66
Silver (Rs / Kg)	89747	1.69	-0.24	25.38	29.32
Aluminium (Rs / Kg)	235	-0.88	-1.82	10.70	14.00
Copper (Rs / kg)	804	-1.25	-4.31	3.29	14.26
Lead (Rs / kg)	185	-0.38	-5.77	-2.65	-2.29
Zinc (Rs /Kg)	278	0.54	-4.05	7.23	20.56
Nickel (Rs / kg)	1355	-0.49	-9.29	-32.27	-9.82

Global	13- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2563.78	-1.82	-2.62	-1.82	31.71
Silver (oz/\$)	3052.00	0.00	-2.02	0.00	36.49
Brent (\$/bbl)	72.28	0.54	-8.55	0.54	-12.41
NYMEX crude (\$/bbl)	68.43	0.46	-9.44	0.46	-12.56

Upcoming market indicators

Date	Indicator	Previous
November 15	US Retail Sales YoY	1.7%
November 15	UK GDP Growth Rate Pre Q3	0.7%
November 15	Japan GDP Growth Annualized Prel Q3	3.1%
November 19	Eurozone Inflation, October	1.7%
November 20	China Loan Prime Rate 1Y/5Y	3.1%/3.6%

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 mixed on Wednesday with Dow Jones ending higher due to stock specific gains while Nasdaq declined due to selloff in technology stocks.
- 10-year US bond yield ended higher at 4.44% following latest US inflation numbers which intact Fed rate cut hopes.
- FTSE index index rose marginally on Wednesday after US inflation data came inline with expectation.
- Asian markets were trading lower at 8.30 AM.
- US inflation accelerated to 2.6% in October 2024, up from 2.4% in September while annual core consumer price inflation rate stood at a three-month high of 3.3% unchanged from previous month.
- US Consumer Price Index increased to 315.66 points in October from 315.30 points in September.
- Japan producer prices increased by 3.4% on year in October 2024, steeper than an upwardly revised 3.1% growth in the previous month

Commodity

- Crude oil prices rose 31 cents to \$68.43 a barrel on the NYMEX due to short covering at lower level.
- The US Energy Information Administration raised its expectation of US oil output to an average 13.23 million barrels per day this year, or 300,000 bpd higher than last year's record of 12.93 million bpd, and up from 13.22 million bpd forecast earlier.
- Domestic gold prices ended higher due to festive buying in domestic market.

Forthcoming results

Date	Company
November 14	Hindustan Aeronautics Ltd.
November 14	Grasim Industries Ltd.
November 14	Hero MotoCorp Ltd.

	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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