



Domestic Market Performance

Indian market indices	27- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24275	0.33	0.39	39.83	22.63
BSE Sensex	80234	0.29	1.05	36.01	21.62
BSE 100	25656	0.41	0.68	45.76	26.10
BSE 200	11142	0.53	0.51	50.80	27.57
BSE 500	35733	0.57	0.77	54.29	28.06
BSE SmallCap	54561	1.18	4.25	102.40	37.06
BSE MidCap	45958	0.34	1.11	90.97	36.74
BSE LargeCap	9419	0.56	0.39	43.06	25.09
Sectoral indices					
BSE IT	43641	0.07	4.59	53.24	33.43
BSE Oil & Gas	26539	0.86	-3.52	52.67	35.99
BSE FMCG	21205	0.46	-0.91	28.61	11.52
BSE Auto	53146	0.43	-1.81	88.15	36.92
BSE Bankex	59574	0.24	2.76	29.42	20.74
BSE Teck	19775	0.03	2.64	52.38	35.32
BSE Capital Goods	70332	1.13	5.88	104.64	43.68
BSE Consumer Durable	62637	0.08	2.38	66.46	35.48

Turnover (Rs Cr)	27- Nov	26- Nov
BSE Cash	7467	5917
NSE Cash	107332	87510
NSE F&O	50056043	33149105

Rs. Cr (Equity)	FII Inv 26- Nov	MF Inv 25- Nov	DII Inv 27- Nov
Buy	13,852	14,700	10,230
Sell	10,037	18,737	8,928
Net	3,815	-4,036	1,302
Net (MTD)	-12,030	25,552	30,042
Net (YTD)	-7,533	386,358	479,360

	27- Nov	1Day	Month ago	Year ago
USD	84.45	84.29	84.08	83.37
GBP	106.44	105.98	109.14	104.48
Euro	88.81	88.41	91.01	90.95
100 Yen	55.76	54.58	55.31	55.81

Indian markets

- Indian equities closed higher on Wednesday, boosted by banks and auto stocks, due to easing geopolitical uncertainty.
- The top gainers were Adani Enterprises, Adani Ports, Bharat Electricals, Trent and NTPC, up 2.12-11.50%.
- The top losers were Apollo Hospital, Titan Company, Wipro, Shriram Finance and IndusInd Bank, down 0.76-1.33%.

Indian debt

- The interbank call money rate closed higher at 6.75% on Wednesday compared to 6.65% on Tuesday.
- Government bond prices closed higher on Wednesday due to a lack of fresh cues.
- The yield of the new 10-year benchmark 06.79% GS 2034 paper ended lower at 6.82% on Wednesday compared to 6.83% on Tuesday.

Indian Rupee

- The rupee closed lower against the US dollar on Wednesday, due to strong dollar index.

Regulatory

- The Competition Commission of India granted approval to Kotak Mahindra bank to acquire the unsecured personal loans portfolio of Standard Chartered Bank's India unit.

Economy and Government

- According to a parliament paper shared by Union Minister of State for Finance, Pankaj Chaudhary the Reserve Bank of India recorded a 300% jump in counterfeit Rs 500 notes in the banking system during FY 2018-19 to FY 2023-24
- Russian diplomat informed that the bilateral trade between the two countries has reached at the record of \$66 billion in 2024.
- Government said it has deployed 33 supercomputers with a combined capacity of 32 petaflops under the National Supercomputing Mission.
- Food Minister Pralhad Joshi said the Centre has no immediate proposal to increase the margins for fair price shops (FPS) dealers under the Targeted Public Distribution System (TPDS).
- The government will launch the first round of sale of mineral blocks in offshore areas with 13 mines across the Arabian Sea and Andaman Sea set to be auctioned.
- According to data shared by Minister of State for Communications Pemmasani Chandra Sekhar India's major telecom operators held a combined debt of Rs 4.09 lakh crore in FY24.

Domestic Debt Market Indicators

Instrument	27- Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.75%	6.65%	5.95%	5.75%	5.50%	6.75%
3-Month T-Bill	6.50%	6.48%	6.50%	6.62%	6.83%	6.95%
6-Month T-Bill	6.64%	6.60%	6.58%	6.70%	7.13%	7.09%
1-year T-Bill	6.61%	6.62%	6.58%	6.69%	7.18%	7.13%
3-Month CD	7.17%	7.19%	7.19%	7.19%	7.00%	7.29%
6-Month CD	7.43%	7.43%	7.40%	7.58%	7.37%	7.58%
1-year CD	7.53%	7.52%	7.50%	7.59%	7.60%	7.75%
3-Month CP	7.50%	7.46%	7.50%	7.67%	7.35%	7.78%
6-Month CP	7.72%	7.72%	7.80%	7.95%	7.71%	7.95%
1-year CP	7.77%	7.77%	7.90%	7.87%	7.90%	8.05%
1-year Gilt	6.71%	6.72%	6.62%	6.73%	7.14%	7.16%
3-year Gilt	6.73%	6.73%	6.75%	6.75%	7.16%	7.26%
5-year Gilt	6.78%	6.79%	6.76%	6.78%	7.19%	7.30%
1-year AAA	7.60%	7.60%	7.57%	7.64%	7.70%	7.65%
3-year AAA	7.36%	7.36%	7.37%	7.58%	7.70%	7.74%
5-year AAA	7.31%	7.31%	7.32%	7.48%	7.70%	7.70%
10-year G-sec	6.81%	6.83%	6.85%	6.86%	7.31%	7.27%
Net LAF (Rs Cr)	-36418	-6956	48907	103563	104121	-116694
Forex reserves (\$ bn)	657.89	675.65	688.27	674.66	578.78	595.40

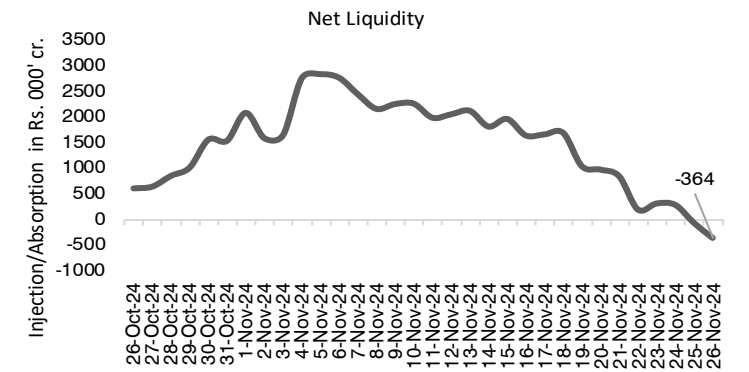
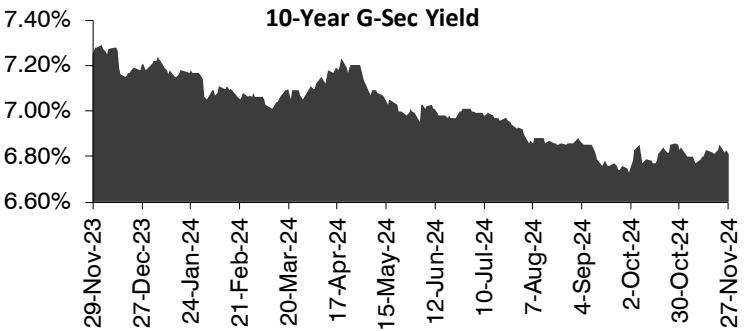
Yields (%)	G-sec	AAA	AA +	AA	AA-	A +
6 months	6.64	7.53	8.31	8.32	9.58	10.03
1 Year	6.71	7.60	8.38	8.39	9.65	10.10
3 Year	6.73	7.36	8.14	8.15	9.41	9.86
5 Year	6.78	7.31	8.20	8.22	9.47	9.92
10 Year	6.81	7.18	8.07	8.09	9.34	9.79

Rs. Cr (Debt)	FII Inv 26- Nov	MF Inv 25- Nov
Buy	1,142	6,135
Sell	371	13,401
Net	771	-7,266
Net (MTD)	1,266	-22,911
Net (YTD)	103,193	-300,122

Economic Indicators	Latest	Quarter	Year Ago
CPI	6.21% (Oct-24)	3.54% (Jul-24)	4.87% (Oct-23)
WPI	2.36% (Oct-24)	2.04% (Jul-24)	-0.52 (Oct-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	57.3* (Nov-24)	57.9 (Aug-24)	56 (Nov-23)
India Service PMI	59.2* (Nov-24)	60.9 (Aug-24)	56.9 (Nov-23)

Capital markets

- Public sector banks (PSBs) have secured approval from the finance ministry to raise Rs 25,200 crore in the current financial year (2024-25) from the equity market.
- Godrej Properties launched its qualified institutional placement (QIP) to sell equity shares to investors for raising up to Rs 6,000 crore to fund its growth plan.
- SBI garnered Rs 5,000 crore AT1 Bonds, Rs 15,000 crore Tier 2 Bonds and Rs 30,000 crore Long Term Bonds till date during FY25.
- Bank of India (BoI) raised Rs 5,000 crore through a 10-year infrastructure bond issuance at a coupon rate of 7.41%.
- Bank of Baroda successfully raised Rs 3,500 crore through tier-2 bonds at a coupon rate of 7.41%.



Global market indices	27- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44722.06	-0.31	6.19	34.40	26.57
Nikkei 225	38134.97	-0.80	0.58	35.99	14.01
FTSE	8274.75	0.20	0.31	8.43	10.91
Hang Seng	19603.13	2.32	-4.79	-3.91	11.86
Taiwan	22334.78	-1.52	-4.34	40.75	29.20

Global debt	27- Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.25	4.30	4.25	3.83	3.49	4.39
UK 10-Year (%)	4.30	4.35	4.24	4.00	3.49	4.27
German 10-Year (%)	2.17	2.20	2.29	2.28	2.30	2.56
Japan 10-Year (%)	1.05	1.07	0.93	0.89	0.33	0.76

Domestic	27- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	76175	0.64	-2.36	27.49	23.99
Silver (Rs / Kg)	88430	-0.04	-7.69	23.54	21.06
Aluminium (Rs / Kg)	245	-0.20	0.51	15.03	19.76
Copper (Rs / kg)	802	-0.14	-2.95	3.11	12.27
Lead (Rs / kg)	189	-0.73	-1.41	-0.47	-0.11
Zinc (Rs /Kg)	291	1.01	0.47	12.27	27.09
Nickel (Rs / kg)	1350	-0.82	-1.60	-32.52	-4.30

Global	27- Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2621.28	0.14	-4.14	0.14	30.93
Silver (oz/\$)	3039.00	0.73	-9.58	0.73	24.91
Brent (\$/bbl)	72.83	0.03	-4.23	0.03	-8.81
NYMEX crude (\$/bbl)	68.72	-0.07	-4.26	-0.07	-8.20

Upcoming market indicators

Date	Indicator	Previous
November 27	US GDP Growth Rate QoQ 2nd Est Q3	2.8%
November 27	US PCE Price Index YoY OCT	2.1%
November 29	Eurozone inflation flash, November	2.0%
December 02	US ISM Manufacturing PMI, November	46.5
December 03	US JOLTs Job Openings OCT	7.443 mn

Global markets:

- Wall Street stocks ended lower on Wednesday as technology stocks fell amid concerns the Fed may delay rate cuts following strong US inflation data.
- 10-year US bond yield ended lower at 4.25% as a key inflation reading cam in as per market expectations.
- FTSE index index ended marginally higher on Wednesday as lower bond yields boosted housing and real estate stocks.
- Asian markets were trading higher at 8.30 AM.
- US Durable Goods Orders rose by 0.2% over a month to \$286.561 billion in October, following a revised 0.4% decrease in the prior month.
- US GDP Growth Rate expanded to 2.8% on year in Q3 2024, compared to 3% in Q2.
- US initial jobless claims held steady at 213,000 for the week ending November 23.
- US wholesale inventories rose by 0.2% over-month to \$905 billion in October, rebounding from a 0.2% fall in the previous month.
- US PCE Prices rose by 1.5% on quarter in Q3 2024, following a 2.5% rise Q2 while core PCE Prices rose by 2.1% compared to 2.8%.

Commodity

- Crude oil prices marginally fell 5 cents to \$68.72 a barrel on the NYMEX weighed down by a surprise rise in US gasoline stocks.
- Domestic gold prices ended higher due to resurfacing geopolitical tensions.

Forthcoming results

Date	Company
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

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	393.44	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05	3987.63	1203.24
	IIP, %y/y	NA	3.10%	-0.10%	4.70%	4.70%	5.90%	5.00%	5.40%	5.60%	4.20%
	Exports, \$ billion	39.2	34.58	34.71	33.98	35.2	38.13	34.99	41.68	41.4	36.92
	Imports, \$ billion	66.34	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	18.56	20.18	19.40	18.81	22.03	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	2.60%	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%	11.60%	10.20%
	Infra – Electricity	NA	-0.50%	-3.70%	7.90%	8.60%	13.70%	10.20%	8.60%	7.60%	5.70%
	Infra – Steel	NA	1.50%	3.90%	6.40%	6.30%	8.90%	9.80%	7.50%	9.40%	9.20%
	Infra – Cement	NA	7.10%	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%	9.10%	5.60%

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