

# Daily Market Monitor

Mar 05, 2025

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	04-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22083	-0.17	-6.98	-1.09	-1.44
BSE Sensex	72990	-0.13	-7.12	-0.90	-1.19
BSE 100	23008	-0.06	-7.55	-1.23	-1.34
BSE 200	9917	-0.03	-7.76	-1.80	-2.12
BSE 500	31370	0.11	-8.27	-2.10	-2.88
BSE SmallCap	43326	1.28	-13.00	0.37	-4.77
BSE MidCap	38722	0.08	-10.11	-1.53	-3.26
BSE LargeCap	8456	-0.03	-7.36	-2.59	-2.66
Sectoral indices					
BSE IT	36629	-0.77	-13.18	2.76	-3.56
BSE Oil & Gas	22706	1.10	-8.99	-17.86	-21.38
BSE FMCG	18317	-0.40	-11.89	-5.18	-6.17
BSE Auto	45498	-1.13	-13.94	-7.41	-4.83
BSE Bankex	54979	0.51	-3.65	2.74	1.93
BSE Teck	17135	-0.86	-11.38	6.35	1.82
BSE Capital Goods	56876	1.41	-8.19	-6.67	-4.01
BSE Consumer Durable	53673	0.09	-10.96	2.67	2.17

Turnover (Rs Cr)	04-Mar	03-Mar
BSE Cash	4220	6006
NSE Cash	87916	94975
NSE F&O	9838254	12071846

Rs. Cr (Equity)	FII Inv 03-Mar	MF Inv 25-Feb	DII Inv 04-Mar
Buy	10,063	9,000	13,542
Sell	14,725	6,954	8,691
Net	-4,663	2,046	4,851
Net (MTD)	-4,663	36,163	13,642
Net (YTD)	-123,939	93,782	157,816

	04-Mar	1Day	Month ago	Year ago
USD	87.38	87.33	87.12	82.89
GBP	110.91	110.07	108.01	105.09
Euro	91.59	90.95	89.70	89.93
100 Yen	58.52	58.10	56.11	55.16

## Indian markets

- Indian equity benchmarks ended lower on Tuesday amid escalating global trade tensions after US President Donald Trump announced implementation of 25% tariff on imports from Canada and Mexico and 20% on those from China.
- Top losers were Bajaj Auto, Hero MotoCorp, Bajaj Finserv, HCL Tech and Eicher Motors, down 1.86-4.95%.
- Top gainers were BPCL, SBI, Bharat Electronics Ltd, Shriram Finance and Adani Enterprises, up 1.31-3.10%.

## Indian debt

- The interbank call money rate ended flat at 5.75% on Tuesday.
- Government bond prices ended flat on Wednesday as gains due to fall in the US treasury yield were cut short by high state debt supply.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended flat at 6.74% on Tuesday.

## Indian Rupee

- The rupee ended slightly lower against the US dollar on Tuesday weighed down by persistent foreign fund outflows and prevailing uncertainty surrounding the US tariff policies.

## Regulatory

- The Competition Commission of India (CCI) approved JSW Energy's acquisition of KSK Mahanadi Power.
- The CCI granted clearance to US-based private equity firm TPG's proposal to acquire a stake in Schott Poonawalla from billionaire Adar Poonawalla-led Serum Institute of India.

## Economy and Government

- Union Steel and Heavy Industries Minister HD Kumaraswamy said the government will devise a trade strategy for the steel industry after getting clarity on the nature of tariffs imposed by the United States.
- Union minister Jitendra Singh said the goal to generate 100 GW nuclear power by 2047 is ambitious and achievable, and state-run Nuclear Power Corporation of India Limited (NPCIL) and its subsidiaries aim to fulfill nearly half of that target.
- Investments by the Indian diaspora in GIFT City-based funds have crossed USD 7 billion.

## Domestic Debt Market Indicators

Instrument	04-Mar	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.75%	6.50%	6.40%	6.24%	6.24%
3-Month T-Bill	6.49%	6.45%	6.50%	6.42%	6.93%	6.90%
6-Month T-Bill	6.57%	6.57%	6.58%	6.52%	7.04%	7.13%
1-year T-Bill	6.52%	6.55%	6.57%	6.53%	7.07%	7.09%
3-Month CD	7.53%	7.50%	7.46%	7.20%	7.55%	7.70%
6-Month CD	7.67%	7.60%	7.62%	7.43%	7.37%	7.73%
1-year CD	7.60%	7.58%	7.58%	7.53%	7.62%	7.73%
3-Month CP	7.80%	7.80%	7.84%	7.48%	8.15%	8.25%
6-Month CP	7.88%	7.88%	7.95%	7.75%	7.71%	8.25%
1-year CP	7.84%	7.84%	7.83%	7.80%	8.10%	8.15%
1-year Gilt	6.59%	6.58%	6.55%	6.61%	7.14%	7.04%
3-year Gilt	6.59%	6.59%	6.59%	6.61%	7.16%	7.07%
5-year Gilt	6.65%	6.65%	6.64%	6.62%	7.05%	7.06%
1-year AAA	7.52%	7.52%	7.49%	7.50%	7.70%	7.83%
3-year AAA	7.33%	7.33%	7.37%	7.26%	7.70%	7.63%
5-year AAA	7.29%	7.29%	7.20%	7.21%	7.70%	7.63%
10-year G-sec	6.74%	6.74%	6.67%	6.69%	7.05%	7.06%
Net LAF (Rs Cr)	-109792	-118214	-38216	65905	-73145	40902
Forex reserves (\$ bn)	640.48	635.72	629.56	656.58	642.49	619.07

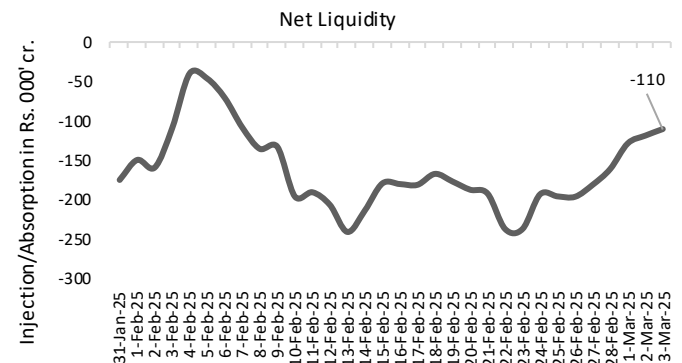
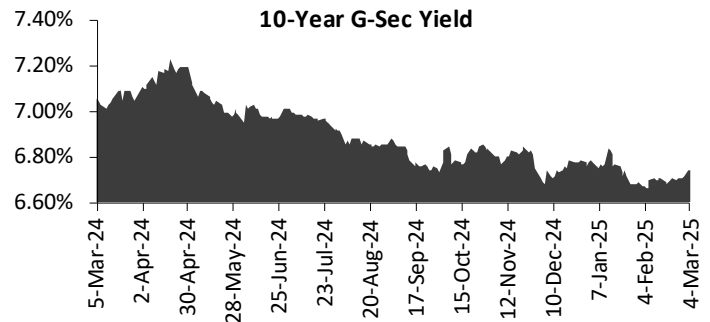
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.57	7.77	8.54	8.56	9.81	10.28
1 Year	6.59	7.52	8.29	8.31	9.56	10.03
3 Year	6.59	7.33	8.10	8.12	9.37	9.84
5 Year	6.65	7.29	8.18	8.19	9.45	9.92
10 Year	6.74	7.29	8.18	8.19	9.45	9.92

Rs. Cr (Debt)	FII Inv 03-Mar	MF Inv 25-Feb
Buy	1,606	15,417
Sell	172	20,861
Net	1,434	-5,444
Net (MTD)	1,434	-49,263
Net (YTD)	-6,425	-104,473

Economic Indicators	Latest	Quarter	Year Ago
CPI	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)
WPI	2.31% (Jan-25)	2.36% (Oct-24)	0.27% (Jan-24)
IIP	3.2% (Dec-24)	3.1% (Sep-24)	4.4% (Dec-23)
GDP	6.2% (Jul-Sep FY'25)	5.4% (Jul-Sep FY'25)	8.6% (Oct-Dec FY24)
India Manufacturing PMI	57.1 (Feb-25)	56.5 (Nov-24)	56.9 (Feb-24)
India Service PMI	61.1 (Feb-25)	58.4 (Nov-24)	60.6 (Feb-24)

## Capital markets

- Veira Electronics received Rs 130 crore in funding from Bharat Value Fund (BVF), which marks the closure of its pre-IPO placement round.
- Beautywise raised Rs 3 crore from Boat cofounder Aman Gupta on Shark Tank India.
- Coforge entered into a \$1.56 billion deal with Sabre to accelerate product delivery and launch additional innovative artificial intelligence (AI)-enabled solutions for the US-based travel technology company.
- Ambuja Cements has received approval from the Competition Commission of India to acquire a 72.8% stake in Orient Cement for Rs 8,100 crore.
- Danfoss Power Solutions conducted ceremony for the establishment of a state-of-the-art facility in Pune, with an investment of Rs 1,000 crore.
- Oil and Natural Gas Corp acquired clean energy firm PTC Energy for Rs 925 crore
- Rail Vikas Nigam awarded Rs 729.82 crore project for distribution infrastructure in Himachal Pradesh.
- GE Vernova T&D India secured Rs 500 crore in orders from Power Grid Corporation of India.



Global market indices	04-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42520.99	-1.55	-4.57	6.82	9.06
Nikkei 225	37331.18	-1.20	-3.78	-7.06	-6.93
FTSE	8759	-1.27	2.20	10.14	14.64
Hang Seng	22941.77	-0.28	10.35	38.69	38.24
Taiwan	22596.88	-0.70	-0.86	12.16	17.05

Global debt	04-Mar	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.22	4.16	4.52	4.19	4.21	4.22
UK 10-Year (%)	4.53	4.56	4.52	4.25	3.98	4.12
German 10-Year (%)	2.48	2.49	2.39	2.05	2.29	2.40
Japan 10-Year (%)	1.43	1.39	1.27	1.05	0.71	0.72

Domestic	04-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	86432	1.30	4.12	28.52	36.16
Silver (Rs / Kg)	95293	0.95	1.60	28.55	34.64
Aluminium (Rs / Kg)	260	-1.29	2.30	24.86	28.25
Copper (Rs / kg)	862	0.20	3.32	13.53	17.94
Lead (Rs / kg)	190	-27.92	1.61	4.95	3.75
Zinc (Rs / Kg)	273	-0.49	0.72	25.14	24.71
Nickel (Rs / kg)	1386	0.14	4.11	-2.56	-5.98

Global	04-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2891.69	1.13	2.59	1.13	38.80
Silver (oz/\$)	3169.00	1.73	0.28	1.73	36.83
Brent (\$/bbl)	71.04	-0.81	-6.77	-0.81	-14.20
NYMEX crude (\$/bbl)	68.26	-0.16	-6.11	-0.16	-13.31

## Global markets

- Wall Street stocks ended lower on Tuesday as deepening trade war fears fueled concerns over economic growth.
- 10-year US bond yield ended higher at 4.22% after US Commerce Secretary Howard Lutnick suggested that there may be some tariff relief
- FTSE index declined on Tuesday due to new US tariffs concerns and weaker oil prices dragged energy stocks.
- Asian markets were trading lower at 8.30 AM.
- Eurozone unemployment rate was at 6.2% for a third month in January 2025.
- China Caixin General Services PMI advanced to 51.4 in February 2025, compared to 51.0 in January, while Caixin China General Composite PMI increased to 51.5 in from 51.1.
- Japan Jibun Bank Services PMI rose to 53.7 in February compared to January's 53.0 while the Jibun Bank Composite PMI edged up at 52.0 from 51.1.
- Japan consumer confidence index unexpectedly declined to 35.0 in February 2025, down compared to 35.2 in January 2025.

## Commodity

- Crude oil prices fell 11 cents to \$68.26 a barrel on the NYMEX as OPEC+ stuck to output hikes and US-China trade tensions escalated.
- Domestic gold prices ended higher due to escalating trade war fear.

## Forthcoming results

Date	Company
NA	NA

## Upcoming market indicators

Date	Indicator	Previous
March 05	US S&P Global Composite PMI Final, February	52.7
March 05	Eurozone PPI YoY, January	0%
March 05	India HSBC Services PMI Final, February	56.5
March 05	Eurozone PPI, January	0%
March 07	US Non-Farm Payrolls, February	143,000

**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		Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24	May-24
Debt Indicators	Currency in circulation (Rs billion)	36419	35893	35643	35,589	35,103	34,994	35,231	35,600	35,814	35,792
	Repo rate	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%	6.86%	6.92%	7.01%	6.99%
	Call rate	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%	6.50%	6.50%	6.25%	6.24%
	Forex reserves (\$ billion; mthly. avg.)	638	629	648	666	694	688.744	674	662	653	644
	GDP	NA	NA	6.20%			5.40%			6.70%	
	Fiscal deficit (Rs billion)	NA	2554.5	674.95	957.7	2763.0	3934.4	1582.31	1412.33	850.97	-1595.21
	IIP, %y/y	NA	NA	3.20%	5.20%	3.50%	3.10%	-0.10%	4.70%	4.70%	5.90%
	Exports, \$ billion	NA	36.43	38.01	32.11	39.2	34.58	34.71	33.98	35.2	38.13
	Imports, \$ billion	NA	59.42	59.95	69.95	66.34	55.36	64.36	57.48	56.18	61.91
	Manufacturing PMI	56.3	57.7	56.4	56.5	57.5	56.5	57.5	58.1	58.3	57.5
	Services PMI	61.1	56.5	59.3	58.4	58.5	57.7	60.9	60.3	60.5	60.2
	GST collections (Rs crore)	183646	195506	176857	182,269	187,346	173,240	174,962	182,075	173,813	172,739
	India crude oil import (mbpd)	NA	NA	19.98	19.07	19.71	18.79	20.18	19.40	18.81	22.03
Sector update	Auto – Passenger vehicles	NA	1.8%	9.8%	20.6%	15.2%	-3.1%	-2.8%	-1.74%	4.30%	20.50%
	Auto – Two-wheelers	NA	2.1%	-8.8%	-1.1%	14.2%	15.8%	9.6%	12.45%	21.30%	1.09%
	Auto – Commercial vehicles	NA	0.6%	3.4%	13.8%	1.5%	-22.02%	-11.63%	-12.29%	-8.30%	-0.10%
	Auto – Tractors	NA	11.4%	14.0%	-1.3%	22.4%	3.7%	-5.8%	1.61%	3.60%	0.00%
	Banks – Deposit growth	NA	10.8%	11.50%	11.50%	11.80%	11.60%	10.90%	11.30%	11.80%	13.30%
	Banks – Credit growth	NA	11.5%	11.28%	11.30%	11.70%	13.00%	13.50%	13.90%	19.30%	19.50%
	Infra – Coal	NA	4.6%	5.3%	7.50%	7.80%	2.60%	-8.10%	6.80%	14.80%	10.20%
	Infra – Electricity	NA	1.3%	6.2%	4.40%	2.00%	0.50%	-3.70%	7.90%	8.60%	13.70%
	Infra – Steel	NA	3.7%	7.3%	4.4%	5.70%	1.80%	4.10%	7.00%	6.30%	8.90%
	Infra – Cement	NA	14.5%	4.6%	13.50%	3.10%	7.60%	-2.50%	5.10%	1.80%	-0.60%

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