

Daily Market Monitor

Mar 07, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	06-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22545	0.93	-4.49	0.98	0.31
BSE Sensex	74340	0.83	-4.76	0.94	0.34
BSE 100	23532	0.88	-4.89	1.02	0.75
BSE 200	10161	0.86	-5.01	0.61	0.23
BSE 500	32200	0.92	-5.57	0.49	-0.06
BSE SmallCap	45265	1.63	-10.38	4.86	2.08
BSE MidCap	40009	0.65	-6.94	1.75	0.78
BSE LargeCap	8653	0.91	-4.70	-0.33	-0.60
Sectoral indices					
BSE IT	37507	0.33	-11.54	5.23	-0.29
BSE Oil & Gas	23815	2.36	-5.65	-13.85	-17.38
BSE FMCG	18844	1.15	-7.20	-2.45	-2.69
BSE Auto	46971	0.76	-10.25	-4.42	-3.27
BSE Bankex	55545	0.26	-2.65	3.79	1.79
BSE Teck	17541	0.32	-9.05	8.88	4.27
BSE Capital Goods	58635	0.82	-4.70	-3.79	-0.36
BSE Consumer Durable	54581	0.18	-6.44	4.41	3.91

Turnover (Rs Cr)	06-Mar	05-Mar
BSE Cash	5004	7209
NSE Cash	94950	96044
NSE F&O	48244344	19783203

Rs. Cr (Equity)	FII Inv 05-Mar	MF Inv 25-Feb	DII Inv 06-Mar
Buy	15,423	9,000	13,276
Sell	17,313	6,954	11,658
Net	-1,889	2,046	1,618
Net (MTD)	-10,088	36,163	18,631
Net (YTD)	-129,364	93,782	162,805

	06-Mar	1Day	Month ago	Year ago
USD	87.09	87.09	87.56	82.83
GBP	112.33	111.45	109.36	105.46
Euro	94.09	92.63	90.98	90.10
100 Yen	58.50	58.19	57.43	55.37

Indian markets

- Indian equity benchmarks ended higher on Thursday as the Reserve Bank of India's liquidity measure boosted financial stocks, lower oil prices lifted energy stocks and US tariff relief improved sentiment.
- Top gainers were Asian Paints, Coal India, Hindalco, BPCL and NTPC, up 3.59-4.78%.
- Top losers were Tech Mahindra, Trent, Bharat Electronics Ltd, Kotak Mahindra Bank and HDFC Life, down 0.47-2.25%.

Indian debt

- The interbank call money rate ended lower at 5.75% on Thursday compared to 5.95% on Wednesday.
- Government bond prices ended higher on Thursday due to RBI's liquidity measures. However, uncertainty over the 10-year paper's inclusion in the central bank's debt purchase limited the gains.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.68% on Thursday compared to 6.71% on Wednesday.

Indian Rupee

- The rupee ended flat against the US dollar on Thursday as gains due to weakness in the US dollar index and rally in domestic equity markets following easing tariff concerns coupled with weak crude oil prices were capped due to persistent foreign fund outflows.

Economy and Government

- S&P Global Commodity Insights said India's demand for spot cargoes of Liquefied Natural Gas (LNG) is expected to reduce as importers shift towards medium and long term contracts over the next two years, as a result of multiple deals that come into effect as early as next month.
- Finance Minister Nirmala Sitharaman stated that trade negotiations with Commerce Minister Piyush Goyal in the United States require close attention, as US President plans for reciprocal tariffs approaches.
- Union Finance Minister Nirmala Sitharaman launched the New Credit Assessment Model based on the scoring of digital footprints of MSMEs (micro, small and medium enterprises) in post-Budget interaction at Visakhapatnam.
- Union Minister for Parliamentary Affairs and Minority Affairs Kiren Rijju stated that minorities in India are the "luckiest people", as the country provides exclusive schemes and welfare programmes for them, unlike anywhere else in the world.
- The Central government has finalised the outlines of the second phase of the India Semiconductor Mission (ISM) and is now holding internal discussions before rollout of the scheme which will support more ambitious design-linked innovations and design initiatives in the country.

Domestic Debt Market Indicators

Instrument	06-Mar	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.95%	6.25%	6.24%	6.24%	6.24%
3-Month T-Bill	6.46%	6.51%	6.42%	6.39%	6.93%	6.90%
6-Month T-Bill	6.57%	6.59%	6.53%	6.53%	7.04%	7.13%
1-year T-Bill	6.54%	6.57%	6.51%	6.54%	7.07%	7.08%
3-Month CD	7.54%	7.58%	7.34%	7.14%	7.55%	7.65%
6-Month CD	7.69%	7.69%	7.52%	7.35%	7.37%	7.65%
1-year CD	7.66%	7.63%	7.48%	7.48%	7.62%	7.65%
3-Month CP	7.80%	7.80%	7.66%	7.48%	8.15%	8.22%
6-Month CP	7.88%	7.88%	7.85%	7.65%	7.71%	8.22%
1-year CP	7.90%	7.88%	7.82%	7.80%	8.10%	8.20%
1-year Gilt	6.58%	6.58%	6.53%	6.65%	7.14%	7.04%
3-year Gilt	6.55%	6.58%	6.59%	6.66%	7.16%	7.06%
5-year Gilt	6.60%	6.63%	6.64%	6.68%	7.05%	7.05%
1-year AAA	7.57%	7.59%	7.46%	7.53%	7.70%	7.81%
3-year AAA	7.38%	7.40%	7.30%	7.29%	7.70%	7.62%
5-year AAA	7.34%	7.36%	7.22%	7.24%	7.70%	7.61%
10-year G-sec	6.68%	6.72%	6.66%	6.74%	7.05%	7.05%
Net LAF (Rs Cr)	-54477	-20417	-69755	61154	-73145	52927
Forex reserves (\$ bn)	640.48	635.72	629.56	658.09	642.49	619.07

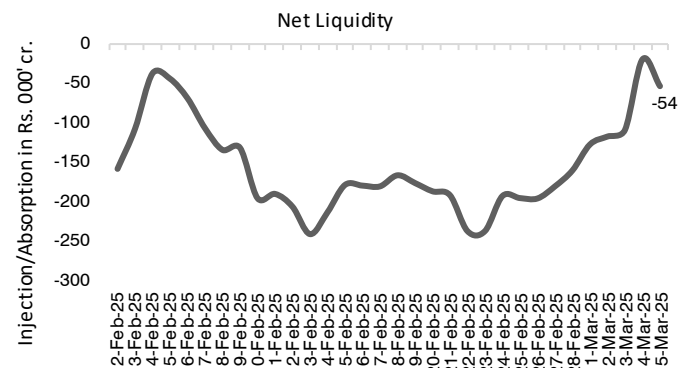
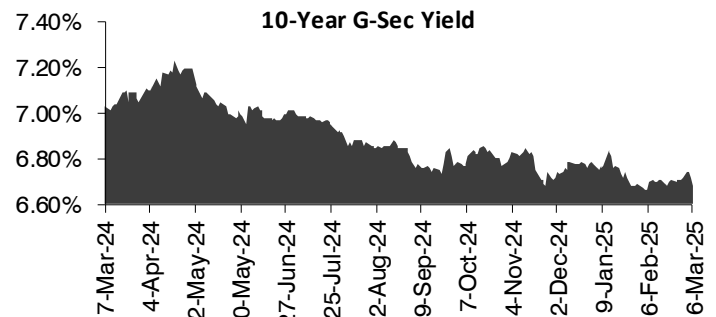
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.57	7.77	8.54	8.56	9.81	10.28
1 Year	6.58	7.57	8.34	8.36	9.61	10.08
3 Year	6.55	7.38	8.15	8.17	9.42	9.89
5 Year	6.60	7.34	8.23	8.24	9.50	9.97
10 Year	6.68	7.34	8.23	8.24	9.50	9.97

Rs. Cr (Debt)	FII Inv 05-Mar	MF Inv 25-Feb
Buy	1,193	15,417
Sell	360	20,861
Net	833	-5,444
Net (MTD)	1,876	-49,263
Net (YTD)	-5,982	-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

- Knowledge Realty Trust, a joint venture between Sattva Group and Blackstone, filed a draft prospectus with Sebi to raise as much as Rs 6200 crore via IPO.
- CorporatEdge raised Rs 100 crore from private equity firm Carpediem Capital for expansion of its business.
- Laurus Labs received board's approval for an investment of Rs 83.3 crore in KRKA Pharma
- Kalpataru Projects International Ltd (KPIL) announced securing new orders worth Rs 2,306 crore in the domestic as well the international markets.
- BPTP's latest luxury project Amstoria Verti-Greens in Gurugram has achieved Rs 1,500 crore of inventory bookings on the first day of launch.
- Blue Star will invest Rs 400 crore in FY'26 to expand its manufacturing capacity across room air conditioners, commercial refrigeration, and commercial air conditioning segments.



Global market indices	06-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42579.08	-0.99	-4.85	6.96	10.13
Nikkei 225	37704.93	0.77	-3.49	-6.13	-5.95
FTSE	8682.84	-0.83	-0.51	9.18	13.07
Hang Seng	24369.71	3.29	16.65	47.33	48.25
Taiwan	22715.43	-0.68	-2.58	12.75	16.49

Global debt	06-Mar	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.28	4.45	4.15	4.21	4.11
UK 10-Year (%)	4.67	4.67	4.48	4.28	3.98	3.99
German 10-Year (%)	2.88	2.78	2.37	2.11	2.29	2.32
Japan 10-Year (%)	1.50	1.43	1.28	1.05	0.71	0.71

Domestic	06-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	85876	-0.49	1.49	27.69	33.16
Silver (Rs / Kg)	96460	0.49	1.79	30.13	34.51
Aluminium (Rs / Kg)	264	1.33	2.47	26.75	30.33
Copper (Rs / kg)	880	0.45	3.25	15.90	20.73
Lead (Rs / kg)	188	-0.11	-1.29	4.12	4.94
Zinc (Rs / Kg)	277	0.27	1.56	26.86	25.80
Nickel (Rs / kg)	1400	-0.35	1.52	-1.58	-5.76

Global	06-Mar	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2919.49	0.33	1.72	0.33	37.17
Silver (oz/\$)	3260.00	2.58	0.37	2.58	37.44
Brent (\$/bbl)	69.46	0.23	-6.50	0.23	-16.27
NYMEX crude (\$/bbl)	66.36	0.08	-6.02	0.08	-16.14

Global markets

- Wall Street stocks ended lower on Thursday as trade policy uncertainty weighed on markets despite a temporary US tariff exemption for Canada and Mexico.
- 10-year US bond yield ended higher at 4.29% due to uncertainty around trade tariffs.
- FTSE index closed lower on Thursday dragged down by rising bond yields and US tariff uncertainty..
- Asian markets were trading lower at 8.30 AM.
- US posted a record trade deficit of \$131.4 billion in January 2025 up from a downwardly revised \$98.1 billion shortfall in December 2024.
- Eurozone HCOB Construction PMI declined to 42.7 in February compared to 45.4 in January.
- The ECB lowered the three key interest rates by 25 basis points, as expected, reducing the deposit facility rate to 2.50%, the main refinancing rate to 2.65%, and the marginal lending rate to 2.90%.
- Eurozone retail sales growth slowed to 1.5% on-year in January 2025 compared to a revised 2.2% in December 2024.
- UK S&P Global Construction PMI declined to 44.6 in February compared to 48.1 in January.

Commodity

- Crude oil prices rose marginally by 5 cents to \$66.36 a barrel on the NYMEX as US-Canada-China tariff concerns and OPEC+ output plans.
- Domestic gold prices ended lower due to easing trade tariff concerns.

Forthcoming results

Date	Company
NA	NA

Upcoming market indicators

Date	Indicator	Previous
March 07	US Non-Farm Payrolls, February	143,000
March 07	US Unemployment Rate, February	4%
March 07	Eurozone Employment Change Final Q4	1%
March 07	Eurozone GDP Growth Rate QoQ 3rd Est Q4	0.4%
March 09	China Inflation Rate YoY, February	0.5%

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully