

Domestic Market Performance

Indian market indices	07-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22162	-3.24	-1.73	-0.74	-1.56
BSE Sensex	73138	-2.95	-1.61	-0.70	-1.50
BSE 100	23182	-3.20	-1.46	-0.48	-1.60
BSE 200	9999	-3.24	-1.53	-1.00	-2.58
BSE 500	31664	-3.29	-1.66	-1.18	-3.24
BSE SmallCap	43974	-4.13	-3.58	1.87	-4.47
BSE MidCap	39108	-3.46	-1.96	-0.54	-4.22
BSE LargeCap	8525	-3.18	-1.45	-1.81	-3.03
Sectoral indices					
BSE IT	32110	-2.92	-13.68	-9.92	-10.96
BSE Oil & Gas	23550	-2.81	-1.19	-14.81	-15.39
BSE FMCG	19262	-1.29	2.26	-0.29	-0.82
BSE Auto	44389	-3.77	-5.75	-9.67	-10.14
BSE Bankex	57160	-3.37	2.99	6.81	4.71
BSE Teck	15860	-2.85	-9.05	-1.56	-1.91
BSE Capital Goods	57056	-4.34	-3.15	-6.38	-8.67
BSE Consumer Durable	52119	-2.08	-3.44	-0.30	-2.58

Turnover (Rs Cr)	07-Apr	04-Apr
BSE Cash	8447	5669
NSE Cash	124335	103513
NSE F&O	14594210	13276820

Rs. Cr (Equity)	FII Inv 04-Apr	MF Inv 03-Apr	DII Inv 07-Apr
Buy	14,210	7,612	26,528
Sell	17,338	8,289	14,406
Net	-3,128	-677	12,122
Net (MTD)	-13,483	5,429	17,755
Net (YTD)	-124,706	123,778	199,515

	07-Apr	1Day	Month ago	Year ago
USD	85.81	85.23	87.06	83.29
GBP	110.68	111.53	112.22	105.20
Euro	94.46	94.34	94.20	90.32
100 Yen	59.07	58.41	59.02	55.09

Indian markets

- Indian equity benchmarks sharply declined on Monday amid mounting fears of a global trade war and potential recession triggered by the US tariff measures.
- Top losers were Trent, Tata Steel, JSW Steel, Hindalco and Shriram Finance, down 6.06-14.77%.
- Top gainer was Hindustan Unilever Ltd, up 0.22%.

Indian debt

- The interbank call money rate ended lower at 5.85% on Monday compared to 6.00% on Friday.
- Government bond prices fell on Monday due profit booking at higher level following selling across the asset classes amid rising global trade war concerns.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.48% on Monday compared to 6.46% on Friday.

Indian Rupee

- The rupee ended lower against the US dollar on Monday amid escalating global trade war concerns following China's retaliatory tariffs against the US.

Economy and Government

- Commerce and industry minister Piyush Goyal said India has a lot of elbow room in bilaterally working with developed countries and those that follow fair trade practices and offer equal opportunity to do business.
- The Ministry of Defence has signed a contract worth Rs 2,385.36 crore with Bharat Electronics Limited to upgrade Mi-17 V5 helicopters with indigenous Electronic Warfare Suites.
- The government increased excise duty on petrol and diesel by Rs 2 per litre amid fluctuating global oil prices.
- The Central Government released over Rs 4,200 crore to Andhra Pradesh for Amaravati Capital Development project after it (centre) received the first disbursement of \$205 million from the World Bank
- Government hikes LPG cylinder price by Rs 50 citing rising global gas costs.

Domestic Debt Market Indicators

Instrument	07-Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.85%	6.00%	5.80%	6.25%	6.24%	6.50%
3-Month T-Bill	6.07%	6.07%	6.48%	6.54%	6.93%	6.79%
6-Month T-Bill	6.20%	6.22%	6.57%	6.61%	7.04%	6.98%
1-year T-Bill	6.20%	6.21%	6.54%	6.64%	7.07%	7.00%
3-Month CD	6.54%	6.54%	7.56%	7.45%	7.55%	7.30%
6-Month CD	6.89%	6.85%	7.66%	7.58%	7.37%	7.45%
1-year CD	6.98%	6.98%	7.66%	7.64%	7.62%	7.50%
3-Month CP	6.87%	6.87%	7.81%	7.73%	8.15%	7.85%
6-Month CP	7.19%	7.19%	7.88%	7.80%	7.71%	7.97%
1-year CP	7.27%	7.27%	7.90%	7.95%	8.10%	8.00%
1-year Gilt	6.27%	6.27%	6.57%	6.65%	7.14%	7.02%
3-year Gilt	6.29%	6.27%	6.56%	6.67%	7.16%	7.08%
5-year Gilt	6.34%	6.31%	6.60%	6.73%	7.05%	7.08%
1-year AAA	7.10%	7.10%	7.57%	7.48%	7.70%	7.54%
3-year AAA	7.03%	7.03%	7.38%	7.33%	7.70%	7.67%
5-year AAA	7.03%	7.03%	7.34%	7.21%	7.70%	7.57%
10-year G-sec	6.49%	6.47%	6.69%	6.75%	7.05%	7.12%
Net LAF (Rs Cr)	160791	161024	-82465	-144350	-73145	147824
Forex reserves (\$ bn)	665.40	658.80	638.70	640.28	642.49	645.58

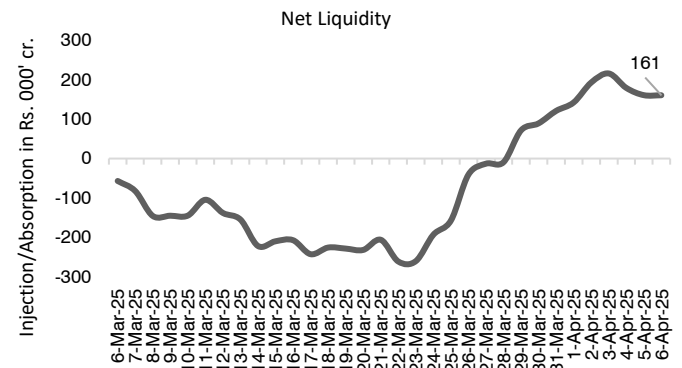
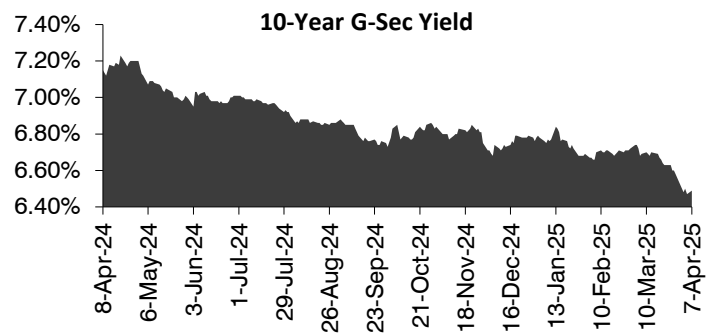
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.20	7.10	7.87	7.89	9.14	9.61
1 Year	6.27	7.10	7.87	7.89	9.14	9.61
3 Year	6.29	7.03	7.80	7.82	9.07	9.54
5 Year	6.34	7.03	7.92	7.93	9.19	9.66
10 Year	6.49	7.03	7.92	7.93	9.19	9.66

Rs. Cr (Debt)	FII Inv 04-Apr	MF Inv 03-Apr
Buy	1,211	20,549
Sell	1,284	10,767
Net	-74	9,782
Net (MTD)	-1,408	13,550
Net (YTD)	-157	-183,561

Economic Indicators	Latest	Quarter	Year Ago
CPI	3.61% (Feb-25)	5.48% (Nov-24)	5.09% (Feb-24)
WPI	2.38% (Feb-25)	1.89% (Nov-24)	0.20% (Feb-24)
IIP	5.0% (Jan-25)	3.5% (Oct-24)	4.2% (Jan-24)
GDP	6.2% (Jul-Sep FY'25)	5.4% (Jul-Sep FY'25)	8.6% (Oct-Dec FY24)
India Manufacturing PMI	58.1 (Mar-25)	56.4 (Dec-24)	59.1 (Mar-24)
India Service PMI	58.5 (Mar-25)	59.3 (Dec-25)	61.2 (Mar-24)

Capital markets

- Nanotechnology and advanced materials startup Vimano has raised Rs 25 crore in its seed round, led by Ankur Capital.
- SoftBank Group plans to raise 600 billion yen (\$4.10 billion) by issuing bonds to retail investors.
- Juspay has secured \$60 million as part of its Series D funding round through a combination of primary and secondary investments.
- Tata Capital and Imagine Marketing submitted their draft red herring prospectuses (DRHPs) to the Securities and Exchange Board of India (Sebi) via the confidential filing route.
- Adani Ports and Special Economic Zone Ltd. began operations at the Colombo West International Terminal (CWIT), a significant \$800 million investment.
- Brigade Enterprises signed a Joint Development Agreement for a residential project spread across 10 acres and 37 guntas, with a total development potential of around 0.37 million square feet.
- Metropolis plans to acquire Dr Ahujas' Pathology & Imaging Centre for Rs 35 cr.



Global market indices	07-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	37965.6	-0.91	-11.30	-4.63	-2.41
Nikkei 225	31136.58	-7.83	-15.59	-22.48	-20.15
FTSE	7702.08	-4.38	-11.27	-3.15	-2.64
Hang Seng	19828.3	-13.22	-18.17	19.87	18.56
Taiwan	19232.35	-9.70	-14.81	-4.54	-5.43

Global debt	07-Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.15	4.01	4.32	4.67	4.21	4.40
UK 10-Year (%)	4.62	4.45	4.65	4.68	3.98	4.10
German 10-Year (%)	2.64	2.57	2.84	2.49	2.29	2.40
Japan 10-Year (%)	1.22	1.17	1.50	1.12	0.71	0.77

Domestic	07-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	89085	-2.12	3.52	32.46	27.48
Silver (Rs / Kg)	90392	-2.71	-6.55	21.94	14.28
Aluminium (Rs / Kg)	233	-1.65	-11.87	12.04	4.58
Copper (Rs / kg)	811	-3.06	-7.81	6.90	1.72
Lead (Rs / kg)	182	0.50	-3.28	0.47	-5.15
Zinc (Rs /Kg)	254	-1.84	-9.13	16.32	7.61
Nickel (Rs / kg)	1284	-6.20	-9.52	-9.69	-14.17

Global	07-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3036.97	-2.97	4.00	-2.97	32.68
Silver (oz/\$)	2959.00	-7.24	-9.65	-7.24	10.33
Brent (\$/bbl)	64.21	-2.09	-8.74	-2.09	-29.57
NYMEX crude (\$/bbl)	60.70	-2.08	-9.46	-2.08	-30.16

Global markets

- Wall Street stocks ended mixed on Monday with Nasdaq gaining, driven by rally in tech stocks while Dow Jones declined as economic slowdown and inflation fear worsened after US President's tariff threats on Chinese imports.
- 10-year US bond yield ended higher at 4.15% following reports that Trade Representative Jamieson Greer tasked with leading trade negotiations with Tokyo.
- FTSE index closed lower on Monday as US President's tariff stance intensified global recession fears.
- Asian markets were trading higher at 8.30 AM.
- Eurozone retail sales rose by 2.3% on-year in February 2025, compared to an upwardly revised 1.8% growth in January 2025.
- UK Halifax House Price Index rose by 2.8% in March 2025, unchanged from a slightly revised figure in February 2025

Commodity

- Crude oil prices fell \$1.29 to \$60.70 a barrel on the NYMEX after US President's tariff threats raised global recession and demand concerns.
- Domestic gold prices ended lower due to profit booking at a higher level.

Forthcoming results

Date	Company
NA	NA

Upcoming market indicators

Date	Indicator	Previous
April 09	India RBI Interest Rate Decision	6.25%
April 10	US Inflation Rate, March	3.1%
April 10	China Inflation Rate, March	-0.7%
April 11	UK GDP, February	1%
April 11	India Inflation Rate, March	3.61%

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		Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24
Debt Indicators	Currency in circulation (Rs billion)	36997	36444	35893	35643	35,589	35,103	34,994	35,231	35,600	35,814
	Repo rate	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%	6.86%	6.92%	7.01%
	Call rate	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%	6.50%	6.50%	6.25%
	Forex reserves (\$ billion; mthly. avg.)	656	638	629	648	666	694	688.744	674	662	653
	GDP	NA	NA	6.20%			5.40%			6.70%	
	Fiscal deficit (Rs billion)	NA	1773.1	2554.5	674.95	957.7	2763.0	393.44	1582.31	1412.33	850.97
	IIP, %y/y	NA	NA	5.00%	3.20%	5.20%	3.50%	3.10%	-0.10%	4.80%	4.70%
	Exports, \$ billion	NA	36.91	36.43	38.01	32.11	39.2	34.58	34.71	33.98	35.2
	Imports, \$ billion	NA	50.96	59.42	59.95	69.95	66.34	55.36	64.36	57.48	56.18
	Manufacturing PMI	58.1	56.3	57.7	56.4	56.5	57.5	56.5	57.5	58.1	58.3
	Services PMI	57.7	59	56.5	59.3	58.4	58.5	57.7	60.9	60.3	60.5
	GST collections (Rs crore)	196141	183646	195506	176857	182,269	187,346	173,240	174,962	182,075	173,813
	India crude oil import (mbpd)	NA	0.191	21.2	20.2	19.07	19.71	18.79	20.18	19.40	18.81
Sector update	Auto – Passenger vehicles	NA	1.4%	1.8%	9.8%	20.7%	14.9%	-1.0%	-2.0%	-2.32%	4.30%
	Auto – Two-wheelers	NA	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%	9.6%	12.45%	19.51%
	Auto – Commercial vehicles	NA	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%	-11.63%	-12.29%	-8.30%
	Auto – Tractors	NA	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%	-5.8%	1.61%	3.60%
	Banks – Deposit growth	10.20%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%	10.90%	11.30%	11.80%
	Banks – Credit growth	11.10%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%	13.50%	13.90%	19.30%
	Infra – Coal	NA	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%	-8.10%	6.80%	14.80%
	Infra – Electricity	NA	2.8%	2.4%	6.2%	4.40%	2.00%	-0.50%	-3.70%	7.90%	8.60%
	Infra – Steel	NA	5.6%	4.7%	7.3%	10.5%	5.70%	1.80%	4.10%	7.00%	6.30%
	Infra – Cement	NA	10.5%	14.6%	4.6%	13.10%	3.10%	7.20%	-2.50%	5.10%	1.80%

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