

Daily Market Monitor

Apr 11, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	09-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	22399	-0.61	-0.68	0.32	-1.08
BSE Sensex	73847	-0.51	-0.65	0.27	-1.12
BSE 100	23460	-0.52	-0.28	0.71	-0.99
BSE 200	10119	-0.55	-0.35	0.19	-1.82
BSE 500	32045	-0.59	-0.48	0.00	-2.45
BSE SmallCap	44446	-1.08	-2.55	2.96	-3.24
BSE MidCap	39547	-0.73	-0.86	0.57	-2.95
BSE LargeCap	8627	-0.53	-0.27	-0.63	-2.42
Sectoral indices					
BSE IT	40521	24.00	8.94	13.68	12.88
BSE Oil & Gas	23688	-1.94	-0.61	-14.31	-15.77
BSE FMCG	19028	-3.17	1.02	-1.50	-1.50
BSE Auto	48768	8.09	3.55	-0.76	-2.56
BSE Bankex	55908	-3.59	0.73	4.47	1.61
BSE Teck	18750	15.94	7.53	16.38	15.96
BSE Capital Goods	56543	-2.97	-4.02	-7.22	-9.51
BSE Consumer Durable	54522	2.18	1.01	4.30	2.25

Turnover (Rs Cr)	09-Apr	08-Apr
BSE Cash	3604	5127
NSE Cash	80977	94247
NSE F&O	36943049	16560606

Rs. Cr (Equity)	FII Inv 08-Apr	MF Inv 07-Apr	DII Inv 09-Apr
Buy	13,917	21,125	13,990
Sell	18,590	9,768	11,014
Net	-4,674	11,357	2,977
Net (MTD)	-27,088	16,436	23,829
Net (YTD)	-138,311	134,786	205,589

	09-Apr	1Day	Month ago	Year ago
USD	86.62	85.91	87.06	83.31
GBP	111.14	109.87	112.22	105.20
Euro	95.81	94.30	94.20	90.21
100 Yen	59.68	58.25	59.02	54.87

Indian markets

- Indian equity benchmarks ended lower on Wednesday as rising global trade tensions overshadowed the RBI's rate cut decision and the shift in its policy stance to accommodative from neutral.
- The top losers were Wipro, SBI, Larsen & Toubro, Tech Mahindra and Trent, down 3.08-4.29%.
- The top gainers were Nestle, Hindustan Unilever Limited, Tata Consumer Products, Titan Company and Power Grid Corporation of India, up 1.54-3.05%.

Indian debt

- The interbank call money rate ended flat at 5.60% on Wednesday.
- Government bond prices ended higher on Wednesday, after RBI cut the key policy rates and changed its monetary policy stance to accommodative from "neutral", raising hopes for further rate cut.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.44% on Wednesday compared to 6.47% on Tuesday.

Indian Rupee

- The rupee ended lower against the US dollar on Wednesday as investors overpassed the RBI's rate cut decision and weighed on escalating trade tariff tensions.

Regulatory

- Employees' Provident Fund Organisation (EPFO) has launched a service that allows members to generate and activate their Universal Account Number (UAN) using Aadhaar-based Face Authentication Technology (FAT) through the UMANG mobile application.

Economy and Government

- The National Bank for Financing Infrastructure and Development (NaBFID) signed a Memorandum of Understanding (MoU) with the New Development Bank (NDB) creating a deep and sustainable infrastructure financing market and developing a supportive ecosystem around it.
- The government of Andhra Pradesh cleared investment plans to the tune of Rs 31,167 crore by 17 companies in sectors like information and communication, food processing, information technology and energy.
- The Delhi government signed a memorandum of understanding (MoU) to implement the Pradhan Mantri Ayushman Bharat Health Infrastructure Mission (PM ABHIM) in the national capital.
- The government of Andhra Pradesh cleared investment plans to the tune of Rs 31,167 crore by 17 companies in sectors like information and communication, food processing, information technology and energy.

Domestic Debt Market Indicators

Instrument	09-Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.60%	5.60%	5.80%	6.25%	6.24%	6.10%
3-Month T-Bill	5.96%	6.05%	6.48%	6.57%	6.93%	6.82%
6-Month T-Bill	6.03%	6.15%	6.57%	6.68%	7.04%	6.99%
1-year T-Bill	6.06%	6.17%	6.54%	6.69%	7.07%	7.01%
3-Month CD	6.53%	6.53%	7.56%	7.55%	7.55%	7.30%
6-Month CD	6.80%	6.87%	7.66%	7.67%	7.37%	7.45%
1-year CD	6.85%	6.98%	7.66%	7.70%	7.62%	7.50%
3-Month CP	6.86%	6.86%	7.81%	7.75%	8.15%	7.70%
6-Month CP	7.15%	7.19%	7.88%	7.90%	7.71%	7.95%
1-year CP	7.27%	7.27%	7.90%	7.99%	8.10%	8.00%
1-year Gilt	6.21%	6.26%	6.57%	6.66%	7.14%	7.03%
3-year Gilt	6.21%	6.28%	6.56%	6.71%	7.16%	7.12%
5-year Gilt	6.26%	6.32%	6.60%	6.75%	7.05%	7.12%
1-year AAA	7.07%	7.10%	7.57%	7.48%	7.70%	7.56%
3-year AAA	7.03%	7.06%	7.38%	7.33%	7.70%	7.67%
5-year AAA	7.03%	7.06%	7.34%	7.21%	7.70%	7.59%
10-year G-sec	6.45%	6.47%	6.69%	6.76%	7.05%	7.15%
Net LAF (Rs Cr)	132865	141274	-82465	-200938	-73145	72396
Forex reserves (\$ bn)	665.40	658.80	638.70	640.28	642.49	645.58

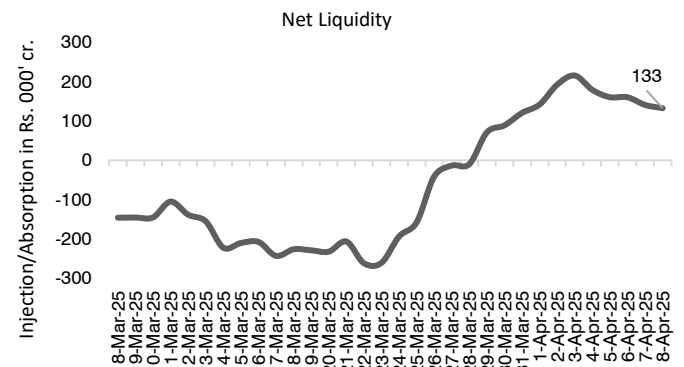
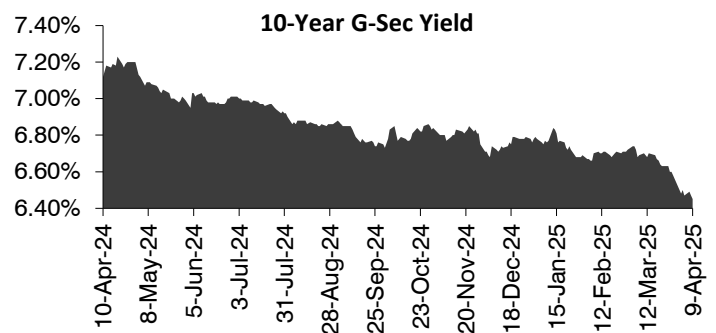
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.03	7.00	7.77	7.79	9.04	9.51
1 Year	6.21	7.07	7.84	7.86	9.11	9.58
3 Year	6.21	7.03	7.80	7.82	9.07	9.54
5 Year	6.26	7.03	7.92	7.93	9.19	9.66
10 Year	6.45	7.03	7.92	7.93	9.19	9.66

Rs. Cr (Debt)	FII Inv 08-Apr	MF Inv 07-Apr
Buy	26	15,747
Sell	2,943	14,288
Net	-2,917	1,459
Net (MTD)	-4,325	15,604
Net (YTD)	-3,074	-181,507

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

- Baldota Group plans to foray into the steel sector with an investment of Rs 54,000 crore for setting up a project in Karnataka with up to 10.5 million tonnes of (MT) production capacity.
- PioneerUrban Land and Infrastructure Ltd plans to invest Rs 300 crore in a luxury senior living project named Advait, in partnership with J K Organisation.
- Granules India completed its acquisition of Senn Chemicals AG, for 20 million Swiss franc (CHF) (approximately Rs 192.5 crore).
- Xindus secured \$10-million capital in Series A funding round for scaling up its operations.
- Social entertainment startup Eloelo raised \$13.5 million from Play Ventures.



Global market indices	10-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	39593.66	-2.50	-5.53	-0.54	2.94
Nikkei 225	34609	9.13	-6.53	-13.84	-12.56
FTSE	7913.25	3.04	-7.99	-0.50	-0.60
Hang Seng	20681.78	2.06	-13.04	25.03	20.67
Taiwan	19000.03	9.25	-15.40	-5.69	-8.49

Global debt	10-Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.40	4.34	4.22	4.77	4.21	4.55
UK 10-Year (%)	4.65	4.79	4.65	4.84	3.98	4.18
German 10-Year (%)	2.58	2.58	2.83	2.57	2.29	2.44
Japan 10-Year (%)	1.34	1.38	1.52	1.20	0.71	0.83

Domestic	09-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	90161	1.82	4.77	34.06	25.52
Silver (Rs / Kg)	90669	0.34	-6.26	22.32	10.44
Aluminium (Rs / Kg)	232	-1.24	-12.46	11.30	2.98
Copper (Rs / kg)	808	-0.49	-8.21	6.44	-0.91
Lead (Rs / kg)	181	0.75	-3.73	0.00	-5.39
Zinc (Rs /Kg)	250	-1.09	-10.55	14.51	3.76
Nickel (Rs / kg)	1276	-0.63	-10.10	-10.27	-14.80

Global	10-Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3082.58	3.42	5.97	3.42	30.90
Silver (oz/\$)	3059.00	2.65	-5.99	2.65	8.55
Brent (\$/bbl)	63.33	-3.28	-8.59	-3.28	-30.01
NYMEX crude (\$/bbl)	60.07	-3.66	-9.03	-3.66	-30.32

Upcoming market indicators

Date	Indicator	Previous
April 11	UK GDP, February	1%
April 11	India Inflation Rate, March	3.61%
April 11	India Manufacturing Production, February	5.5%
April 14	UK Unemployment Rate, February	4.4%
April 14	India WPI Inflation, March	2.38%

Global markets

- Wall Street stocks ended lower on Thursday amid concerns over US-China trade tensions despite positive inflation data and US-EU trade talks.
- 10-year US bond yield ended higher at 4.40% following better-than-expected inflation data.
- FTSE index closed higher on Thursday after US paused tariffs for 90 days on many countries.
- Asian markets were trading higher at 8.30 AM.
- US annual inflation rate eased 2.4% in March 2025 compared to 2.8% in February 2025, while the annual core consumer price inflation rate cooled down to 2.8% from 3.1%.
- US Initial jobless claims rose by 4,000 from the previous week to 223,000 in the first week of April from 219,000 in the previous week.
- US CPI marginally rose to 319.799 points in March from 319.082 points in February.

Commodity

- Crude oil prices fell \$2.28 cents to \$60.07 a barrel on the NYMEX on demand concerns amid intensifying US-China trade war despite a planned US tariff pause.
- Domestic gold prices ended higher due to safe haven demand.

Forthcoming results

Date	Company
April 15	ICICI Prudential Life Insurance Company
April 16	Wipro
April 17	Infosys
April 17	HDFC Life Insurance Company
April 19	HDFC Bank
April 19	ICICI Bank
April 22	HCL Technologies
April 23	LTIMindtree
April 23	Bajaj Housing Finance
April 24	Hindustan Unilever
April 24	Nestle India
April 24	Tech Mahindra
April 25	Cholamandalam Investment and Finance Company
April 28	UltraTech Cement
April 29	Bajaj Finance
April 29	Bajaj Finserv

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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