

Domestic Market Performance

Indian market indices	05-May	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24461	0.47	6.80	9.56	8.83
BSE Sensex	80797	0.37	7.21	9.70	9.37
BSE 100	25568	0.70	6.77	9.76	7.96
BSE 200	11042	0.79	6.86	9.33	6.71
BSE 500	34919	0.85	6.65	8.97	5.56
BSE SmallCap	47950	1.23	4.54	11.08	1.61
BSE MidCap	43327	1.45	6.96	10.18	2.15
BSE LargeCap	9400	0.70	6.77	8.28	6.63
Sectoral indices					
BSE IT	35337	0.37	6.84	-0.86	4.23
BSE Oil & Gas	27195	1.95	12.23	-1.62	-6.69
BSE FMCG	20659	1.23	5.87	6.94	5.38
BSE Auto	50866	1.88	10.28	3.51	-0.92
BSE Bankex	62148	-0.90	5.06	16.13	12.16
BSE Teck	17402	0.52	6.61	8.01	11.44
BSE Capital Goods	63201	0.85	5.96	3.70	0.93
BSE Consumer Durable	57136	1.13	7.34	9.30	4.24

Turnover (Rs Cr)	05-May	02-May
BSE Cash	6132	6769
NSE Cash	89885	100895
NSE F&O	12086214	14234731

Rs. Cr (Equity)	FII Inv 02-May	MF Inv 30-Apr	DII Inv 05-May
Buy	18,050	11,177	13,918
Sell	15,244	9,164	11,129
Net	2,807	2,013	2,789
Net (MTD)	2,807	17,043	6,079
Net (YTD)	-104,020	135,393	216,068

	05-May	1Day	Month ago	Year ago
USD	84.24	83.86	85.23	83.43
GBP	111.93	111.61	111.53	104.80
Euro	95.40	94.95	94.34	89.63
100 Yen	58.36	57.74	58.41	54.51

Indian markets

- Indian equity benchmarks ended higher on Monday supported by easing US-China trade tensions, steady foreign inflows and a decline in global crude oil prices.
- Top gainers were Adani Enterprises, Adani Ports, Trent, Shriram Finance and Bajaj Finserv, up 3.48-7.03%.
- Top losers were Kotak Mahindra, JSW Steel, ONGC, SBI and Dr Reddy's Laboratories, down 0.98-4.59%.

Indian debt

- The interbank call money rate ended lower at 5.75% on Monday compared to 5.85% on Friday.
- Government bond prices rose on Monday, due to a sharp fall in the global crude oil prices and buying ahead of RBI's weekly debt auction
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.32% on Monday compared to 6.35% on Friday.

Indian Rupee

- The rupee ended lower against the US dollar on Monday due to a fall in global crude oil prices amid high volatility driven by mounting India-Pakistan tensions.

Regulatory

- The Reserve Bank of India (RBI) added nearly 58 tonnes of gold in the financial year 2024-25 (FY25).
- Sebi has strengthened the governance framework of stock exchanges, clearing corporations and depositories by prescribing a mandatory cooling-off period for directors before they can join a competing institution.

Economy and Government

- Moody's Ratings said escalating tensions will hit Pakistan's economy hard and impair the cash-strapped country's access to external financing, in contrast to India which is expected to remain mostly unscathed.
- The Centre plans to take up road infrastructure projects worth Rs 2 lakh crore in the next three-four years in Telangana.
- The Department of Telecom issued stringent security norms mandating legal interception of satellite communication services and barred companies from linking connection of users in any form with any terminal or facility located outside the country's border as well as processing of their data overseas.

Domestic Debt Market Indicators

Instrument	05-May	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.75%	5.85%	6.00%	5.75%	6.24%	6.25%
3-Month T-Bill	5.87%	5.89%	6.07%	6.42%	6.93%	6.98%
6-Month T-Bill	5.90%	5.93%	6.22%	6.55%	7.04%	7.02%
1-year T-Bill	5.89%	5.89%	6.21%	6.50%	7.07%	7.07%
3-Month CD	6.52%	6.52%	6.54%	7.41%	7.55%	7.19%
6-Month CD	6.62%	6.66%	6.85%	7.58%	7.37%	7.48%
1-year CD	6.75%	6.75%	6.98%	7.57%	7.62%	7.68%
3-Month CP	6.74%	6.80%	6.87%	7.75%	8.15%	7.60%
6-Month CP	7.03%	6.99%	7.19%	7.90%	7.71%	7.80%
1-year CP	7.07%	7.09%	7.27%	7.86%	8.10%	7.91%
1-year Gilt	5.96%	5.96%	6.27%	6.53%	7.14%	7.08%
3-year Gilt	6.02%	6.04%	6.27%	6.57%	7.16%	7.15%
5-year Gilt	6.07%	6.09%	6.31%	6.63%	7.05%	7.16%
1-year AAA	6.97%	6.97%	7.10%	7.46%	7.70%	7.62%
3-year AAA	6.98%	6.98%	7.03%	7.30%	7.70%	7.77%
5-year AAA	6.99%	6.99%	7.03%	7.20%	7.70%	7.62%
10-year G-sec	6.32%	6.36%	6.47%	6.66%	7.05%	7.12%
Net LAF (Rs Cr)	138415	136921	179484	-45006	-73145	-77597
Forex reserves (\$ bn)	688.13	686.15	665.40	629.56	642.49	637.92

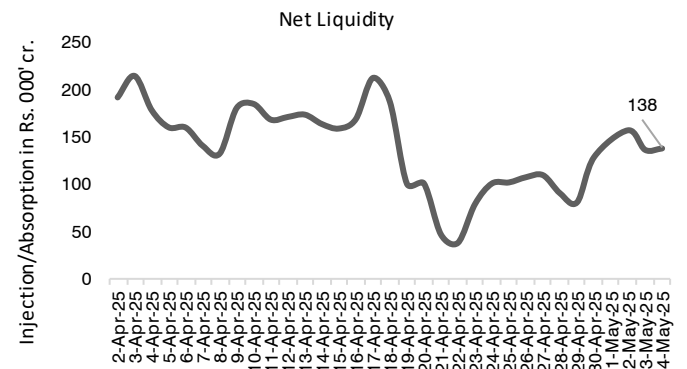
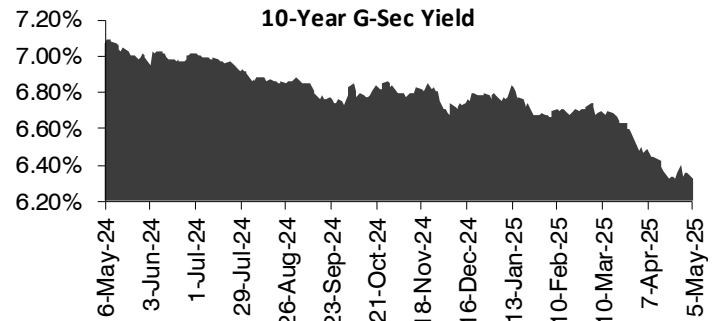
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.90	6.87	7.60	7.63	8.87	9.37
1 Year	5.96	6.97	7.70	7.73	8.97	9.47
3 Year	6.02	6.98	7.71	7.74	8.98	9.48
5 Year	6.07	6.99	7.82	7.85	9.10	9.59
10 Year	6.32	7.00	7.83	7.86	9.11	9.60

Rs. Cr (Debt)	FII Inv 02-May	MF Inv 30-Apr
Buy	294	7,720
Sell	756	11,772
Net	-463	-4,052
Net (MTD)	-463	-13,261
Net (YTD)	-13,591	-210,372

Economic Indicators	Latest	Quarter	Year Ago
CPI	3.34% (Mar-25)	5.22% (Dec-24)	4.85% (Mar-24)
WPI	2.05% (Mar-25)	2.37% (Dec-24)	0.26% (Mar-24)
IIP	3.0% (Mar-25)	3.2% (Dec-24)	5.5% (Mar-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

- Battery tech startup Volt14 raised \$1.87 million from Blume Ventures and others.
- Alt DRX, a tokenised digital real estate marketplace, raised \$2.7 million (around Rs 23 crore) to expand its business.
- Celcius Logistics raised Rs 250 crore in a round co-led by Eurazeo and Omnivore to expand its cold-chain network to 1,000 cities and enhance its tech platform.



Global market indices	05-May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	41218.83	-0.24	7.58	3.55	6.58
Nikkei 225	Closed	NA	NA	NA	NA
FTSE	Closed	NA	NA	NA	NA
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	20532.99	-1.23	-3.59	1.92	1.00

Global debt	05-May	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.36	4.33	4.01	4.43	4.21	4.51
UK 10-Year (%)	NA	4.50	4.45	4.44	3.98	4.26
German 10-Year (%)	2.52	2.52	2.57	2.36	2.29	2.49
Japan 10-Year (%)	NA	1.27	1.17	1.27	0.71	0.89

Domestic	05-May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	95282	1.41	4.69	41.68	33.84
Silver (Rs / Kg)	94100	-0.03	1.28	26.94	17.64
Aluminium (Rs / Kg)	234	-0.43	-1.46	12.26	-2.12
Copper (Rs / kg)	844	0.33	0.84	11.20	-1.36
Lead (Rs / kg)	183	1.13	1.16	1.13	-5.43
Zinc (Rs /Kg)	251	0.40	-3.09	14.83	-3.67
Nickel (Rs / kg)	1339	0.68	-2.18	-5.82	-16.23

Global	05-May	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3241.82	0.76	3.57	0.76	40.71
Silver (oz/\$)	3201.00	-0.65	0.34	-0.65	19.98
Brent (\$/bbl)	60.23	-1.73	-8.16	-1.73	-27.40
NYMEX crude (\$/bbl)	57.13	-1.99	-7.84	-1.99	-26.86

Upcoming market indicators

Date	Indicator	Previous
May 06	US Balance of Trade, March	\$-122.7B
May 06	Eurozone HCOB Composite PMI Final, April	50.9
May 06	UK S&P Global Composite PMI Final, April	51.5
May 07	US Fed Interest Rate Decision	4.5%
May 07	Eurozone Retail Sales, March	2.3%

Global markets

- Wall Street stocks ended lower on Monday, as investors were cautious following US President's unexpected 100% tariff announcement on foreign firms ahead of the Federal Reserve's policy decision.
- 10-year US bond yield ended higher at 4.36% following upbeat ISM services data.
- Asian markets were trading higher at 8.30 AM.
- US S&P Global Composite PMI declined to 50.6 in April 2025, compared to 53.5 in March 2025 while the S&P Global Services PMI edged lower to 50.8 from 54.4.
- US ISM Services PMI increased to 51.60 in April 2025 compared to 50.80 in March 2025.
- China Caixin General Services PMI declined to 50.7 in April 2025 compared to 51.9 in March 2025 while the China Caixin General Composite PMI dropped to 51.1 from 51.8

Commodity

- Crude oil prices fell \$1.16 to \$57.13 a barrel on the NYMEX on oversupply woes after OPEC+ accelerated output and weak demand.
- Domestic gold prices ended higher on weak dollar index,

Forthcoming results

May 6	CG Power and Industrial Solutions
May 6	Polycab India
May 7	Coal India
May 7	Dabur India
May 8	Titan Company
May 8	Larsen & Toubro
May 8	Asian Paints
May 8	Pidilite Industries
May 8	CG Power and Industrial Solutions
May 8	Britannia Industries

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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