

# Daily Market Monitor

July 10, 2025

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	9-July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25476	-0.18	1.49	14.10	4.27
BSE Sensex	83536	-0.21	1.32	13.42	3.96
BSE 100	26693	-0.22	1.16	14.59	3.04
BSE 200	11561	-0.18	0.94	14.47	1.95
BSE 500	36964	-0.10	1.00	15.36	1.43
BSE SmallCap	54805	0.45	1.35	26.96	1.20
BSE MidCap	46724	-0.05	0.33	18.82	-1.72
BSE LargeCap	9811	-0.18	1.12	13.01	2.27
Sectoral indices					
BSE IT	37920	-0.67	1.90	6.38	-1.51
BSE Oil & Gas	28150	-1.41	2.80	1.83	-7.50
BSE FMCG	20578	0.74	0.09	6.52	-4.10
BSE Auto	53558	0.40	0.39	8.99	-8.77
BSE Bankex	63969	-0.11	-0.04	19.53	6.08
BSE Teck	18651	-0.71	3.35	15.76	5.48
BSE Capital Goods	72148	-0.01	1.17	18.39	-4.49
BSE Consumer Durable	60304	0.47	3.20	15.36	2.20

Turnover (Rs Cr)	9-July	8-July
BSE Cash	6354	6442
NSE Cash	95306	91044
NSE F&O	17365049	9181965

Rs. Cr (Equity)	FII Inv 8-July	MF Inv 7-July	DII Inv 9-July
Buy	12,845	8,105	12,976
Sell	12,561	6,913	11,939
Net	284	1,192	1,037
Net (MTD)	1,497	2,871	7,557
Net (YTD)	-70,222	238,505	352,149

	9-July	1Day	Month ago	Year ago
USD	85.80	85.72	85.50	83.49
GBP	116.58	116.82	115.93	106.94
Euro	100.53	100.61	97.66	90.37
100 Yen	58.38	58.65	59.24	51.85

## Indian markets

- Indian equity benchmarks ended lower on Wednesday, due to uncertainties around the US tariffs and the signing of a trade deal between the US and India.
- The top losers were HCL Tech, Tata Steel, Hindalco, Apollo Hospital, and Tech Mahindra, down 1.26-2.00%.
- The top gainers were Shriram Finance, Bajaj Finance, HUL, Coal India, and UltraTech Cement, up 0.94-1.81%.

## Indian debt

- The interbank call money rate ended higher 5.00% on Wednesday compared to 4.90% on Tuesday.
- Government bond prices ended lower on Wednesday after the Reserve Bank of India's liquidity withdrawal move.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.31% on Wednesday compared to 6.30% on Tuesday.

## Indian Rupee

- The rupee ended lower against the dollar on Wednesday after the US President said BRICS nations, including India, could face an additional tariff of 10%.

## Regulatory

- The Reserve Bank issued draft guidelines for novation of OTC derivative contracts with a view to rationalising the related regulatory requirements.
- SEBI proposed allowing credit ratings agencies to rate financial instruments regulated by other financial sector regulators.

## Economy and Government

- Union Finance Minister (FM) Nirmala Sitharman said that non-banking financial companies' (NBFCs') credit should aim to reach at least 50 per cent of the total volume disbursed by scheduled commercial banks (SCBs) by 2047.
- The Centre launched a new dedicated online portal for submitting and processing proposals under the Deendayal Divyangjan Rehabilitation Scheme (DDRS) and the District Disability Rehabilitation Centres (DDRC) Scheme to streamline the application process.
- The Maharashtra government to grant legal status to subdivided land parcels up to January 1, 2025, by relaxing and gradually scrapping the land fragmentation law.
- Union Agriculture Minister Shivraj Singh Chouhan has announced the inclusion of seven new agricultural products, including Banarasi paan, on the e-NAM platform, increasing the total to 238.
- The Union Ministry of Mines launched a focused programme to align District Mineral Foundation (DMF) funds with India's Aspirational Districts initiatives, marking a major shift toward targeted welfare delivery in mining-affected regions.
- The Uttarakhand Cabinet approved the Geothermal Energy Policy, under which scientific and technical research will be encouraged for the exploration of geothermal resources in the state.

## Domestic Debt Market Indicators

Instrument	9-July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	4.90%	4.90%	5.60%	6.24%	6.40%
3-Month T-Bill	5.34%	5.31%	5.33%	5.96%	6.93%	6.73%
6-Month T-Bill	5.50%	5.43%	5.35%	6.03%	7.04%	6.86%
1-year T-Bill	5.55%	5.52%	5.40%	6.06%	7.07%	6.91%
3-Month CD	5.72%	5.72%	5.72%	6.53%	7.55%	7.12%
6-Month CD	6.03%	6.00%	6.00%	6.80%	7.37%	7.41%
1-year CD	6.20%	6.16%	6.15%	6.85%	7.62%	7.60%
3-Month CP	6.20%	6.20%	6.15%	6.86%	8.15%	7.75%
6-Month CP	6.40%	6.40%	6.39%	7.15%	7.71%	7.85%
1-year CP	6.65%	6.65%	6.52%	7.27%	8.10%	7.95%
1-year Gilt	5.58%	5.57%	5.49%	6.21%	7.14%	6.92%
3-year Gilt	5.83%	5.82%	5.70%	6.21%	7.16%	6.94%
5-year Gilt	6.08%	6.06%	5.88%	6.26%	7.05%	6.99%
1-year AAA	6.46%	6.45%	6.43%	7.07%	7.70%	7.68%
3-year AAA	6.64%	6.63%	6.50%	7.03%	7.70%	7.62%
5-year AAA	6.68%	6.67%	6.64%	7.03%	7.70%	7.55%
10-year G-sec	6.31%	6.31%	6.28%	6.45%	7.05%	6.99%
Net LAF (Rs Cr)	307212	343837	244699	181839	-73145	98618
Forex reserves (\$ bn)	702.78	697.94	691.49	665.40	642.49	652.00

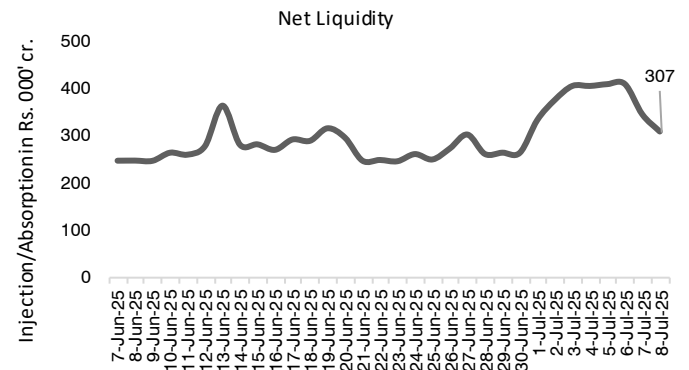
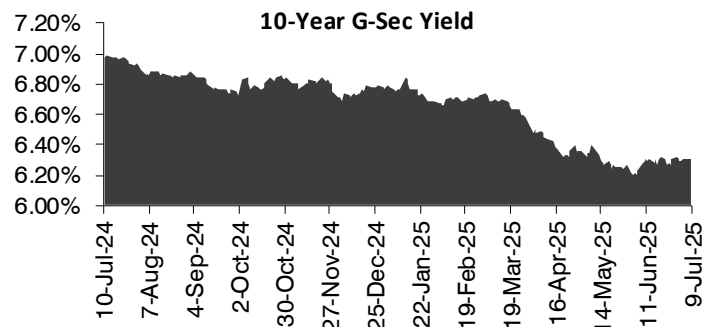
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	6.30	7.01	7.05	8.28	8.81
1 Year	5.58	6.46	7.17	7.21	8.44	8.97
3 Year	5.83	6.64	7.35	7.39	8.62	9.15
5 Year	6.08	6.68	7.49	7.52	8.76	9.29
10 Year	6.31	6.92	7.73	7.76	9.00	9.53

Rs. Cr (Debt)	FII Inv 8-July	MF Inv 7-July
Buy	1,456	11,974
Sell	272	10,934
Net	1,185	1,040
Net (MTD)	1,033	-14,162
Net (YTD)	2,497	-310,100

Economic Indicators	Latest	Quarter	Year Ago
CPI	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)
WPI	0.39% (May-25)	2.45% (Feb-25)	2.74% (May-24)
IIP	1.2% (May-25)	2.9% (Feb-25)	5.9% (May-24)
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)
India Manufacturing PMI	58.4 (Jun-25)	58.1 (Mar-25)	58.3 (Jun-24)
India Service PMI	60.4 (Jun-25)	58.5 (Mar-25)	60.5 (Jun-24)

## Capital markets

- ICICI Prudential Asset Management Company (AMC) has filed a draft red herring prospectus (DRHP) with the markets regulator for an initial public offering estimated at Rs 10,000 crore.
- Asian Paints Limited divested its entire 4.42% stake in Akzo Nobel India Limited selling 20,10,626 equity shares at Rs 3,651 per share.
- IndiGo Ventures raised Rs 450 cr and invested in startup Jeh Aerospace.
- Zepto plans to raise \$450 million-\$500 million at \$7 billion valuation.



Global market indices	9-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44458.3	0.49	3.97	11.68	13.15
Nikkei 225	39821.28	0.33	4.55	-0.86	-4.23
FTSE	8867.02	0.15	0.39	11.50	8.93
Hang Seng	23892.32	-1.06	-1.20	44.44	36.35
Taiwan	22527.01	0.74	3.38	11.82	-5.75

Global debt	9-July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.34	4.42	4.49	4.34	4.21	4.30
UK 10-Year (%)	4.60	4.63	4.62	4.79	3.98	4.16
German 10-Year (%)	2.63	2.64	2.57	2.58	2.29	2.56
Japan 10-Year (%)	1.51	1.49	1.46	1.38	0.71	1.08

Domestic	9-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	96085	-0.91	0.23	42.87	32.81
Silver (Rs / Kg)	107280	-0.20	1.63	44.72	16.80
Aluminium (Rs / Kg)	249	0.30	3.92	19.83	6.20
Copper (Rs / kg)	885	-1.47	0.26	16.64	1.47
Lead (Rs / kg)	183	0.00	0.05	1.19	-7.30
Zinc (Rs /Kg)	260	0.93	1.66	19.18	-6.46
Nickel (Rs / kg)	1310	-1.01	-2.50	-7.87	-10.30

Global	9-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3309.64	-0.71	-0.08	-0.71	40.13
Silver (oz/\$)	3656.00	-0.46	1.61	-0.46	18.47
Brent (\$/bbl)	70.19	0.06	4.70	0.06	-17.09
NYMEX crude (\$/bbl)	68.38	0.07	4.73	0.07	-16.01

## Global markets

- Wall Street stocks closed higher on Wednesday boosted by gains in tech stocks and Fed minutes eased concerns about delayed rate cuts..
- 10-year US bond yield ended lower at 4.34% after Federal Reserve's policy minutes indicated few policy makers support cut this month.
- FTSE index closed higher on Wednesday as investors digested on going US tariff talks.
- Asian markets were trading higher at 8.30 AM.
- Japan Producer prices rose 2.9% in June 2025, compared to a revised 3.2% growth in May 2025.

## Commodity

- Crude oil prices rose marginally by 5 cents to \$68.38 a barrel on the NYMEX buoyed by strong US fuel demand and Red Sea tensions.
- Domestic gold prices ended declined due to strong dollar index.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
July 11	UK GDP, May	0.9%
July 14	India WPI inflation rate, Jun	0.21%
July 15	US Inflation, June	2.4%
July 12	Eurozone Industrial Production, May	0.8%
July 15	China GDP, Q2	5.4%

**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		June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24
Debt Indicators	Currency in circulation (Rs billion)	38427	38344	37762	36997	36444	35893	35643	35,589	35,103	34,994
	Repo rate	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%
	Call rate	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%
	Forex reserves (\$ billion; mthly. avg.)	698	689	682	656	638	629	648	666	694	688.744
	GDP	NA	NA	7.40%			6.40%			5.40%	
	Fiscal deficit (Rs billion)	NA	-1731.69	1863.32	2304.18	1773.1	2554.5	674.95	957.7	2763.0	393.44
	IIP, %y/y	NA	1.20%	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%	3.50%	3.10%
	Exports, \$ billion	NA	38.73	38.49	41.97	36.91	36.43	38.01	32.11	39.2	34.58
	Imports, \$ billion	NA	60.61	64.91	63.51	50.96	59.42	59.95	69.95	66.34	55.36
	Manufacturing PMI	58.4	57.6	58.2	58.1	56.3	57.7	56.4	56.5	57.5	56.5
	Services PMI	60.7	58.8	58.7	58.5	59	56.5	59.3	58.4	58.5	57.7
	GST collections (Rs crore)	184597	201050	236716	196141	183646	195506	176857	182,269	187,346	173,240
	India crude oil import (mbpd)	NA	21.3	21.0	22.7	19.465	21.2	20.2	19.07	19.71	18.79
Sector update	Auto – Passenger vehicles	NA	-1.1%	5.9%	2.4%	2.4%	2.3%	9.8%	20.7%	14.9%	-1.0%
	Auto – Two-wheelers	NA	2.2%	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%
	Auto – Commercial vehicles	NA	-1.0%	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%
	Auto – Tractors	NA	9.1%	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%
	Banks – Deposit growth	10.04%	10.00%	10.20%	10.60%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%
	Banks – Credit growth	9.60%	9.80%	10.30%	11.80%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%
	Infra – Coal	NA	2.8%	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%
	Infra – Electricity	NA	-5.8%	1.7%	7.5%	3.6%	2.4%	6.2%	4.40%	2.00%	-0.50%
	Infra – Steel	NA	6.7%	4.4%	8.7%	6.9%	4.7%	7.3%	10.5%	5.70%	1.80%
	Infra – Cement	NA	9.2%	6.3%	12.2%	10.8%	14.6%	10.3%	13.10%	3.10%	7.20%

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