

Daily Market Monitor

July 11, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	10-July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25355	-0.47	1.00	13.56	4.24
BSE Sensex	83190	-0.41	0.97	12.95	4.09
BSE 100	26580	-0.42	0.71	14.11	2.98
BSE 200	11516	-0.39	0.53	14.03	1.88
BSE 500	36839	-0.34	0.63	14.97	1.46
BSE SmallCap	54869	0.12	1.14	27.11	2.02
BSE MidCap	46593	-0.28	0.01	18.49	-1.81
BSE LargeCap	9772	-0.39	0.72	12.56	2.26
Sectoral indices					
BSE IT	37649	-0.71	-0.40	5.62	-1.23
BSE Oil & Gas	28163	0.05	2.78	1.88	-7.54
BSE FMCG	20480	-0.47	-0.71	6.01	-4.70
BSE Auto	53483	-0.14	0.33	8.83	-7.36
BSE Bankex	63759	-0.33	-0.24	19.14	6.41
BSE Teck	18432	-1.17	1.25	14.40	5.04
BSE Capital Goods	71836	-0.43	0.52	17.87	-4.48
BSE Consumer Durable	60037	-0.44	2.30	14.85	2.02

Turnover (Rs Cr)	10-July	9-July
BSE Cash	6453	6354
NSE Cash	86650	95306
NSE F&O	47638974	17365049

Rs. Cr (Equity)	FII Inv 9-July	MF Inv 8-July	DII Inv 10-July
Buy	13,786	10,336	11,582
Sell	13,114	8,983	11,561
Net	672	1,353	21
Net (MTD)	2,169	4,224	7,577
Net (YTD)	-69,550	239,858	352,169

	10-July	1Day	Month ago	Year ago
USD	85.58	85.80	85.59	83.53
GBP	116.50	116.58	115.62	106.99
Euro	100.47	100.53	97.61	90.38
100 Yen	58.52	58.38	59.24	51.70

Indian markets

- Indian equity benchmarks closed lower on Thursday, weighed down by uncertainty surrounding a potential US-India trade deal and investor caution ahead of the corporate earnings season for the April-June quarter.
- The top losers were Bharti Airtel, Asian Paints, HDFC Life, Apollo Hospitals and Shriram Finance, down 1.37-2.73%.
- The top gainers were IndusInd Bank, Maruti Suzuki, Tata Steel, Bajaj Finance and Bajaj Finserv, up 0.64-1.44%.

Indian debt

- The interbank call money rate ended lower at 4.90% on Thursday compared to 5.00% on Wednesday.
- Government bond prices were little unchanged on Thursday as investors remained on the sidelines ahead of weekly debt auction data to be released by RBI on July 11.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.32% on Thursday compared to 6.31% on Wednesday.

Indian Rupee

- The rupee ended higher against the US dollar on Thursday, due to a weaker dollar index and declining crude oil prices.

Regulatory

- The Reserve Bank of India (RBI) has amended the Foreign Exchange Management (Export of Goods & Services) Regulations, to free tugboats, dredgers, and offshore support vessels from the requirement of furnishing an Export Declaration Form.

Economy and Government

- The Central Government approved the release of Rs. 1,066.80 crore to flood, landslides, affected states of Assam, Manipur, Meghalaya, Mizoram, Kerala and Uttarakhand.

Domestic Debt Market Indicators

Instrument	10-July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.90%	5.00%	5.25%	5.60%	6.24%	5.75%
3-Month T-Bill	5.32%	5.34%	5.36%	5.96%	6.93%	6.73%
6-Month T-Bill	5.48%	5.50%	5.41%	6.03%	7.04%	6.85%
1-year T-Bill	5.54%	5.55%	5.42%	6.06%	7.07%	6.90%
3-Month CD	5.75%	5.72%	5.73%	6.53%	7.55%	7.12%
6-Month CD	6.00%	6.03%	6.06%	6.80%	7.37%	7.41%
1-year CD	6.21%	6.20%	6.24%	6.85%	7.62%	7.60%
3-Month CP	6.20%	6.20%	6.15%	6.86%	8.15%	7.75%
6-Month CP	6.35%	6.40%	6.39%	7.15%	7.71%	7.85%
1-year CP	6.65%	6.65%	6.60%	7.27%	8.10%	7.95%
1-year Gilt	5.56%	5.58%	5.54%	6.21%	7.14%	6.91%
3-year Gilt	5.81%	5.83%	5.76%	6.21%	7.16%	6.93%
5-year Gilt	6.08%	6.08%	5.95%	6.26%	7.05%	6.98%
1-year AAA	6.46%	6.46%	6.52%	7.07%	7.70%	7.68%
3-year AAA	6.64%	6.64%	6.66%	7.03%	7.70%	7.62%
5-year AAA	6.68%	6.68%	6.80%	7.03%	7.70%	7.55%
10-year G-sec	6.32%	6.31%	6.29%	6.45%	7.05%	6.98%
Net LAF (Rs Cr)	326719	307212	261993	181839	-73145	107540
Forex reserves (\$ bn)	702.78	697.94	691.49	665.40	642.49	652.00

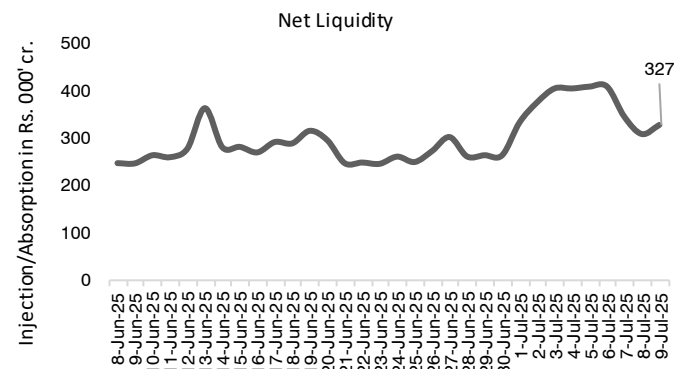
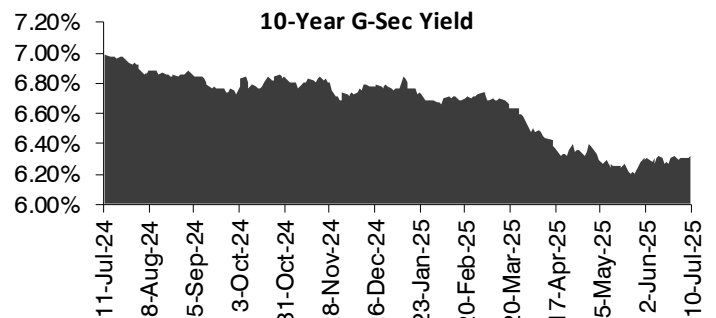
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.48	6.31	7.02	7.06	8.29	8.82
1 Year	5.56	6.46	7.17	7.21	8.44	8.97
3 Year	5.81	6.64	7.35	7.39	8.62	9.15
5 Year	6.08	6.68	7.49	7.52	8.76	9.29
10 Year	6.32	6.94	7.75	7.78	9.02	9.55

Rs. Cr (Debt)	FII Inv 9-July	MF Inv 8-July
Buy	230	10,431
Sell	304	10,792
Net	-73	-361
Net (MTD)	959	-14,523
Net (YTD)	2,424	-310,461

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

- PC Jeweller Ltd's board plans to raise Rs 500 crore equity from promoters and Capital Ventures Pvt Ltd to prepay its loan, as part of its plan to become debt free by the end of this fiscal.
- Muthoot Capital Services plans to raise Rs 125 crore via Non-Convertible Debentures on private placement basis.
- Supply chain collaboration software-as-a-service (SaaS) and financing platform Arteria Technologies has raised Rs 100 crore from ICICI Venture, the investment arm of ICICI Bank, in a funding round.
- Varda Space Industries raised \$187 million in a funding round led by venture capital firms Natural Capital and Shrug Capital, to boost the technology for robotic drug manufacturing in space.
- Aggcon Equipments International Ltd filed draft papers with markets regulator Sebi seeking its approval to raise funds through an initial public offering (IPO).



Global market indices	10-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44650.64	0.43	4.16	12.17	12.41
Nikkei 225	39646.36	-0.44	3.76	-1.30	-5.22
FTSE	8975.66	1.23	1.38	12.86	9.55
Hang Seng	24028.37	0.57	-0.56	45.26	37.53
Taiwan	22693.25	0.74	2.03	12.64	-5.47

Global debt	10-July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.35	4.34	4.47	4.40	4.21	4.28
UK 10-Year (%)	4.60	4.60	4.55	4.65	3.98	4.13
German 10-Year (%)	2.66	2.63	2.53	2.58	2.29	2.53
Japan 10-Year (%)	1.49	1.51	1.48	1.34	0.71	1.09

Domestic	10-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	97046	1.00	0.71	44.30	33.64
Silver (Rs / Kg)	107934	0.61	0.87	45.61	17.58
Aluminium (Rs / Kg)	250	0.10	3.55	19.95	8.24
Copper (Rs / kg)	887	0.18	-0.67	16.85	2.83
Lead (Rs / kg)	184	0.44	0.36	1.63	-3.52
Zinc (Rs /Kg)	262	0.71	2.53	20.03	-4.99
Nickel (Rs / kg)	1325	1.15	-1.07	-6.81	-9.00

Global	10-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3312.68	0.09	-0.63	0.09	40.06
Silver (oz/\$)	3639.00	-0.46	-0.74	-0.46	18.11
Brent (\$/bbl)	68.63	-2.22	2.63	-2.22	-19.33
NYMEX crude (\$/bbl)	66.57	-2.65	2.45	-2.65	-18.92

Global markets

- Wall Street stocks ended higher on Thursday buoyed by rally in Airline stocks following upbeat earnings reports of major company.
- 10-year US bond yield ended higher at 4.35% following upbeat jobless claims data.
- FTSE index ended higher on Thursday led by gains in mining stocks.
- Asian markets were trading higher at 8.30 AM.
- US Initial jobless claims fell by 5,000 from the previous week to 227,000 compared to 232,000.
- China Vehicle Sales grew by 13.8% to 2.904 million units in June 2025, compared to 11.2% increase in May 2025.

Commodity

- Crude oil prices fell by \$1.81 to \$66.57 a barrel on the NYMEX on oversupply woes as OPEC+ alliance agreed to ramp up oil production and increased oil inventories in the US.
- Domestic gold prices ended higher due to weakness in dollar index following uncertainty around US tariff policy.

Forthcoming results

Date	Company
11-July- 2025	Avenue SuperMart

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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