

Daily Market Monitor

July 14, 2025

TATA
mutual fund

Domestic Market Performance

Indian market indices	11-July	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25150	-0.81	0.03	12.64	3.43
BSE Sensex	82500	-0.83	-0.02	12.01	3.26
BSE 100	26354	-0.85	-0.21	13.14	2.05
BSE 200	11419	-0.85	-0.35	13.06	0.92
BSE 500	36546	-0.80	-0.17	14.05	0.52
BSE SmallCap	54485	-0.70	0.37	26.22	0.74
BSE MidCap	46291	-0.65	-0.52	17.72	-2.78
BSE LargeCap	9692	-0.82	-0.17	11.64	1.38
Sectoral indices					
BSE IT	37028	-1.65	-3.24	3.88	-3.02
BSE Oil & Gas	27803	-1.28	-0.36	0.57	-10.23
BSE FMCG	20571	0.45	0.29	6.49	-4.65
BSE Auto	52562	-1.72	-1.59	6.96	-8.57
BSE Bankex	63599	-0.25	-0.21	18.84	5.86
BSE Teck	18092	-1.85	-1.61	12.29	2.97
BSE Capital Goods	70967	-1.21	-0.27	16.45	-5.86
BSE Consumer Durable	59491	-0.91	1.56	13.80	0.31

Turnover (Rs Cr)	11-July	10-July
BSE Cash	6231	6453
NSE Cash	97901	86650
NSE F&O	10267357	47638974

Rs. Cr (Equity)	FII Inv 10-July	MF Inv 9-July	DII Inv 11-July
Buy	12,025	9,838	15,373
Sell	11,185	9,127	11,890
Net	840	711	3,483
Net (MTD)	3,009	4,935	11,060
Net (YTD)	-68,710	240,568	355,652

	11-July	1Day	Month ago	Year ago
USD	85.85	85.58	85.45	83.56
GBP	116.29	116.50	115.23	107.61
Euro	100.29	100.47	97.56	90.64
100 Yen	58.45	58.52	58.89	51.74

Indian markets

- Indian equity benchmarks ended lower on Friday weighed down by the disappointing first-quarter earnings, US tariffs on Canada and concerns over possible sanctions on Russia.
- Top losers were TCS, Mahindra & Mahindra, Bajaj Auto, Wipro and Hero MotoCorp, down 2.37-3.43%.
- Top gainers were HUL, SBI Life Insurance, Axis Bank, Kotak Mahindra and IndusInd Bank, up 0.70-4.62%.

Indian debt

- The interbank call money rate ended higher at 5.00% on Friday compared to 4.90% on Thursday.
- Government bond prices ended higher on Friday as weekly auction data released by the RBI showed better-than-expected demand for debt.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.30% on Friday compared to 6.32% on Thursday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday, after the US announced 35% tariff on imports from Canada.

Regulatory

- The Reserve Bank of India (RBI) clarified that loans sanctioned by banks against the voluntary pledge of gold and silver as collateral, up to the collateral-free limit, will not be considered a violation of the central bank's guidelines on collateral.

Economy and Government

- The RBI said India's forex reserves dropped by \$3.049 billion to \$ 699.736 billion in the week ended July 4.
- Finance Minister Nirmala Sitharaman said the need of the hour is to have globalisation that is tempered to the local needs and a capitalism with a level of humanism.
- Union Minister H D Kumaraswamy launched the first scheme to provide customer facing incentives on purchase of electric trucks of up to Rs 9.6 lakh per vehicle as part of the government's PM E-DRIVE initiative.
- The Unique Identification Authority of India (UIDAI) has implemented stricter rules for Aadhaar enrolment and updates, introducing real-time document verification and cross-database checks.
- Chief Minister Pema Khandu has said multiple hydro-power projects with an investment of over Rs 1 trillion are underway in Arunachal Pradesh to produce 18,000 MW of power.

Domestic Debt Market Indicators

Instrument	11-July	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	4.90%	5.00%	5.62%	6.24%	6.50%
3-Month T-Bill	5.38%	5.32%	5.36%	5.94%	6.93%	6.72%
6-Month T-Bill	5.52%	5.48%	5.41%	6.04%	7.04%	6.85%
1-year T-Bill	5.56%	5.54%	5.51%	6.02%	7.07%	6.90%
3-Month CD	5.75%	5.75%	5.77%	6.50%	7.55%	7.14%
6-Month CD	6.00%	6.00%	6.17%	6.75%	7.37%	7.41%
1-year CD	6.21%	6.21%	6.30%	6.81%	7.62%	7.60%
3-Month CP	6.20%	6.20%	6.21%	6.85%	8.15%	7.75%
6-Month CP	6.35%	6.35%	6.55%	7.06%	7.71%	7.85%
1-year CP	6.65%	6.65%	6.69%	7.15%	8.10%	7.95%
1-year Gilt	5.58%	5.56%	5.60%	6.11%	7.14%	6.92%
3-year Gilt	5.82%	5.81%	5.79%	6.17%	7.16%	6.92%
5-year Gilt	6.08%	6.08%	5.98%	6.23%	7.05%	6.98%
1-year AAA	6.46%	6.46%	6.55%	7.07%	7.70%	7.68%
3-year AAA	6.64%	6.64%	6.69%	7.03%	7.70%	7.62%
5-year AAA	6.68%	6.68%	6.83%	7.03%	7.70%	7.55%
10-year G-sec	6.30%	6.32%	6.30%	6.44%	7.05%	6.98%
Net LAF (Rs Cr)	315352	326719	257819	169303	-73145	130381
Forex reserves (\$ bn)	699.74	702.78	691.49	676.27	642.49	652.00

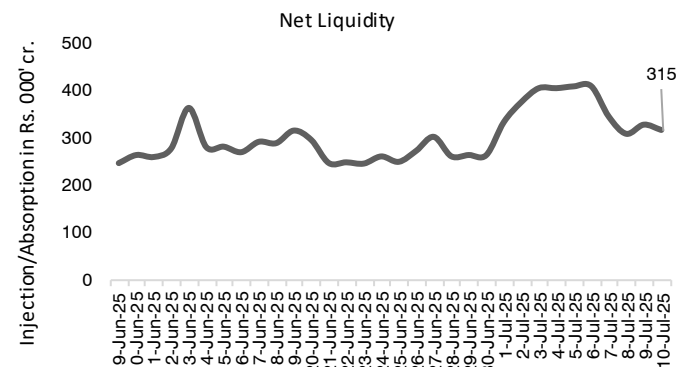
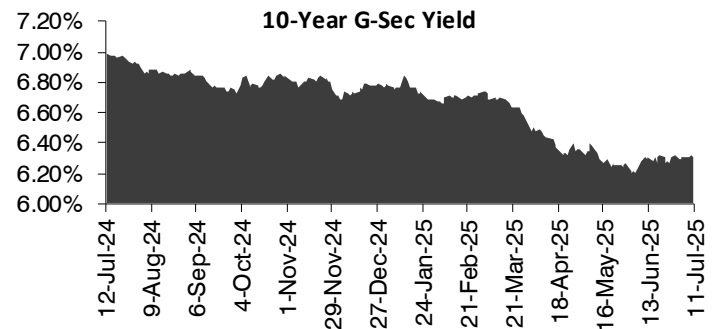
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.33	7.04	7.08	8.31	8.84
1 Year	5.58	6.46	7.17	7.21	8.44	8.97
3 Year	5.82	6.64	7.35	7.39	8.62	9.15
5 Year	6.08	6.68	7.49	7.52	8.76	9.29
10 Year	6.30	6.94	7.75	7.78	9.02	9.55

Rs. Cr (Debt)	FII Inv 10-July	MF Inv 9-July
Buy	651	10,066
Sell	314	13,040
Net	336	-2,974
Net (MTD)	1,296	-17,497
Net (YTD)	2,760	-313,435

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

- The board of directors at Mahindra Logistics approved a plan to raise up to Rs 750 crore through a rights issue.
- FIL Industries is looking to add four to five projects to its ropeway business and plans to raise Rs 200 crore on equity to expand the vertical.
- NLC India is planning to invest Rs 1.25 lakh cr by 2030 to expand its capacity from the existing 6.7 gigawatt to 20 gigawatt.
- RPP Infra secured orders worth Rs 365.85 crore in Rajasthan.
- Siemens secured two orders worth Rs 773 crore for providing advanced signalling and telecommunication technologies for Nagpur Metro Rail from Maharashtra Metro Rail Corporation.
- Nipponply Industries plans to invest Rs 250 crore over the next three years to ramp up production for exports, develop e-commerce infrastructure, and establish warehousing and design centres.



Global market indices	11-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44371.51	-0.63	3.51	11.47	11.62
Nikkei 225	39569.68	-0.19	2.99	-1.49	-6.29
FTSE	8941.12	-0.38	0.87	12.43	8.73
Hang Seng	24139.57	0.46	-0.93	45.93	35.37
Taiwan	22751.03	0.25	1.25	12.93	-6.72

Global debt	11-July	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.43	4.35	4.41	4.48	4.21	4.20
UK 10-Year (%)	4.63	4.60	4.55	4.75	3.98	4.08
German 10-Year (%)	2.69	2.66	2.54	2.53	2.29	2.47
Japan 10-Year (%)	1.50	1.49	1.46	1.35	0.71	1.09

Domestic	11-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	97511	0.48	1.33	44.99	34.38
Silver (Rs / Kg)	110290	2.18	4.55	48.79	19.62
Aluminium (Rs / Kg)	250	0.26	3.11	20.26	8.45
Copper (Rs / kg)	884	-0.37	0.93	16.42	1.52
Lead (Rs / kg)	183	-0.38	-0.92	1.25	-7.67
Zinc (Rs /Kg)	261	-0.23	1.93	19.76	-6.88
Nickel (Rs / kg)	1323	-0.19	-0.82	-6.99	-8.00

Global	11-July	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3351.89	1.18	0.89	1.18	41.26
Silver (oz/\$)	3839.00	5.50	5.09	5.50	24.40
Brent (\$/bbl)	70.36	2.52	0.85	2.52	-17.61
NYMEX crude (\$/bbl)	68.45	2.82	0.44	2.82	-17.15

Global markets

- Wall Street stocks ended lower on Friday after US President announced 35% tariffs on Canadian imports, adding to trade uncertainty.
- 10-year US bond yield ended higher at 4.43% after US announced new tariffs on Canada.
- FTSE index closed lower on Friday as caution grew over domestic growth and US tariff concerns.
- Asian markets were trading mixed at 8.30 AM.
- UK economy expanded 0.7% year-on-year in May, the smallest growth since June last year, compared to an upwardly revised 1.1% rise in April.
- UK Manufacturing production rose by 0.3% in May 2025, compared to an upwardly revised 1.3% gain in April 2025.
- UK industrial production fell by 0.3% in May 2025 compared to a 0.3% growth in April 2025.
- The UK trade deficit narrowed to £5.70 billion in May 2025, down from a downwardly revised £6.50 billion in April.
- Japan Machinery Orders rose by 6.6% year-on-year in April 2025, compared to an 8.4% increase in March 2025.

Commodity

- Crude oil prices rose by \$1.88 to \$68.45 a barrel on the NYMEX as the International Energy Agency raised supply worries with US tariffs and possible Russia sanction concern.
- Domestic gold prices ended higher as announcement of new tariffs by US President raised global trade war concerns.

Forthcoming results

Date	Company
14-July- 2025	HCL Technologies

Upcoming market indicators

Date	Indicator	Previous
July 14	India WPI inflation rate, Jun	0.21%
July 15	China GDP Growth Rate Q2	1.2%
July 16	US PPI, June	0.1%
July 17	Eurozone Inflation Rate Final, Jun	0%
July 18	Japan Inflation Rate Final, Jun	3.5%

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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