Daily Market Monitor

June 19, 2026

Domestic Market Performance

Indian market indices	18 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24168	0.34	2.19	8.22	-2.60
BSE Sensex	77410	0.33	2.78	7.59	-4.95
BSE 100	25735	0.37	2.86	9.95	-1.01
BSE 200	11298	0.41	3.01	11.24	0.26
BSE 500	36285	0.44	3.33	12.75	0.84
BSE SmallCap	55345	0.61	7.73	28.06	4.36
BSE MidCap	47617	0.42	3.74	17.46	4.22
BSE LargeCap	9521	0.42	2.90	10.33	-0.30
Sectoral indices					
BSE IT	27822	-1.12	1.21	-0.37	-27.47
BSE Oil & Gas	26802	0.05	0.90	4.86	-1.15
BSE FMCG	18430	0.25	-1.68	9.87	-7.87
BSE Auto	59030	0.10	4.61	12.19	12.92
BSE Bankex	65355	0.69	8.39	15.51	3.93
BSE Teck	14905	-0.77	-0.01	1.20	-19.12
BSE Capital Goods	82684	0.43	8.48	28.70	18.38
BSE Consumer Durable	61099	0.18	6.16	16.12	5.76

Turnover (Rs Cr)	18 June	17 June
BSE Cash	11460	10130
NSE Cash	133872	133369
NSE F&O	8375732	6970562

Rs. Cr (Equity)	FII Inv 17 June	MF Inv 16 June	DII Inv 18 June
Buy	15,694	10,407	16,163
Sell	14,808	10,752	12,646
Net	886	-345	3,517
Net (MTD)	-36,715	42,380	66,215
Net (YTD)	-281,333	287,601	443,000

	18 June	1Day	Month ago	Year ago
USD	94.28	94.38	96.29	86.30
GBP	125.58	126.60	128.54	116.18
Euro	108.65	109.54	112.04	99.34
100 Yen	58.69	58.89	60.61	59.53

Indian markets

- Indian equity benchmarks closed higher on Thursday, boosted by gains in banking stocks on expectations of strong credit growth.
- The top gainers were Max Health Institute, Indigo, Adani Enterprises, Trent and Bharat Electronics, up 1.96-6.46%.
- The top losers were Infosys, Tata Consumer Products, Tech Mahindra, Tata Consultancy Services and Maruti Suzuki India, down 0.92-2.62%.

Indian debt

- The interbank call-money rate ended lower at 4.80% on Thursday compared to 5.30% on Wednesday.
- Government bond prices ended marginally higher on Thursday, as gains from declining oil prices and continued foreign fund inflows offset pressure from the US Federal Reserve's rate outlook.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.87% on Thursday compared to 6.88% on Wednesday.

Indian Rupee

- The spot rupee ended higher against the United States dollar on Thursday, driven by strong selling of dollars by banks and exporters, reflecting improved market sentiment.

Regulatory

- PFRDA has mandated regular audits of NPS service providers (PoPs) by external auditors to ensure compliance with KYC norms, fund handling and operational standards, tightening oversight of pension intermediaries.

Economy and Government

- S&P Global said India needs to diversify crude import routes and build stronger storage buffers, as the West Asia crisis exposed vulnerabilities from its ~90% import dependence on oil.
- Ministry of Commerce and Industry officials are set to implement the India-UK CETA from 15 July 2026, giving Indian exporters day-one concessions, over 99% duty-free coverage by tariff lines and trade value, a 7–10% tariff edge, and safeguard relief for 85% of steel exports into a $500bn-plus UK market.
- Uttar Pradesh Chief Minister Yogi Adityanath announced plans to build a rapid-rail corridor linking Lucknow–Unnao–Kanpur and an outer-ring road connecting.
- Finance Ministry said the government is considering extending zero-customs duty on 40 critical imports beyond June 30, aiming to ease input costs and support domestic industries.
- Uttar Pradesh Government plans to develop six textile parks across 1,500 acres, targeting over Rs 10,000 crore in investments and large-scale job creation, aimed at boosting exports and positioning UP as a key textile manufacturing hub.
- The Ministry of Commerce & Industry said India-UK social security pact could benefit 90–95% of Indian professionals in the UK by cutting dual contributions, boosting competitiveness of IT and services exports.

Domestic Debt Market Indicators

Instrument	18 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.80%	5.30%	5.18%	5.40%	7.00%	5.10%
3-Month T-Bill	5.25%	5.25%	5.45%	5.32%	5.40%	5.35%
6-Month T-Bill	5.45%	5.49%	5.64%	5.53%	5.51%	5.44%
1-year T-Bill	5.75%	5.78%	5.77%	5.64%	5.70%	5.49%
3-Month CD	6.60%	6.60%	7.07%	7.30%	7.35%	5.90%
6-Month CD	7.10%	7.15%	7.32%	7.28%	7.30%	6.15%
1-year CD	7.40%	7.40%	7.65%	7.02%	7.25%	6.32%
3-Month CP	6.97%	7.05%	7.80%	7.58%	7.75%	6.22%
6-Month CP	7.47%	7.50%	7.90%	7.65%	7.65%	6.61%
1-year CP	7.70%	7.75%	8.05%	7.35%	7.60%	6.68%
1-year Gilt	5.74%	5.82%	6.11%	5.78%	5.82%	5.57%
3-year Gilt	6.24%	6.18%	6.60%	6.12%	6.43%	5.82%
5-year Gilt	6.48%	6.47%	6.94%	6.47%	6.90%	5.94%
1-year AAA	7.54%	7.53%	7.84%	7.35%	7.57%	6.63%
3-year AAA	7.39%	7.43%	7.89%	7.40%	7.59%	6.75%
5-year AAA	7.45%	7.48%	7.93%	7.42%	7.67%	6.81%
10-year G-sec	6.87%	6.88%	7.13%	6.73%	7.02%	6.26%
Net LAF (Rs Cr)	4772	23881	182435	27397	245161	287352
Forex reserves ($ bn)	681.61	682.32	696.99	716.81	642.49	696.66

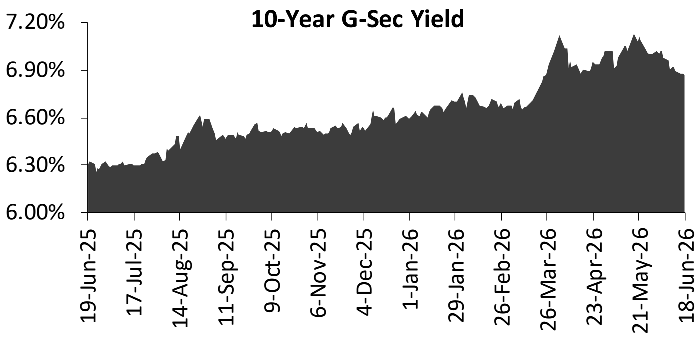
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.44	8.16	8.24	9.47	9.95
1 Year	5.74	7.54	8.26	8.34	9.57	10.05
3 Year	6.22	7.39	8.11	8.19	9.42	9.90
5 Year	6.48	7.45	8.27	8.35	9.58	10.06
10 Year	6.87	7.53	8.35	8.43	9.66	10.14

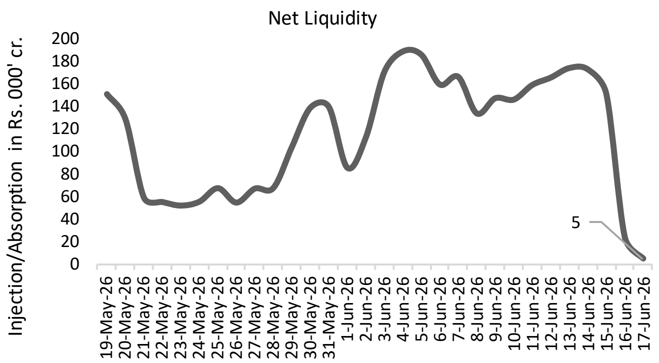
Rs. Cr (Debt)	FII Inv 17 June	MF Inv 16 June
Buy	1,039	34,077
Sell	71	35,019
Net	968	-942
Net (MTD)	8,590	-74,959
Net (YTD)	5,476	-460,968

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.93% (May'26)	3.21% (Feb'26)	3.03% (May'25)
WPI	9.68% (May'26)	2.18% (Feb'25)	-0.20% (May'25)
IIP	4.90% (Apr-26)	5.10% (Jan-26)	2.60% (Apr-25)
GDP	7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY25)
India Manufacturing PMI	55.0 (May-26)	56.9 (Feb-26)	58.3 (May-25)
India Service PMI	59.8 (May-26)	58.1 (Feb-26)	61.2 (May-25)
Bank Credit Growth*	1.22% (May 31, 2026)		-0.68% (May 15, 2026)
Bank Deposit Growth*	1.55% (May 31, 2026)		-0.12% (May 15, 2026)

Capital markets

- Tulip Group plans to invest Rs 6,000 crore in Gurugram's residential projects, including the 495-foot-tall Tulip Melrose on Southern Peripheral Road (SPR).
- JBM Auto secured Rs 750 crore investment to scale electric bus deployments, boosting its presence in India's EV public transport segment.
- Kirloskar Ferrous Industries secured a $13.5 million export order for pig iron, supporting earnings visibility and export traction.
- L'Oréal signed an agreement to acquire a majority stake in D2C beauty firm Innovist, expanding its India-focused digital portfolio.
- Emirates NBD completed the acquisition of a majority stake in RBL Bank through a primary capital infusion of about $2.75 billion (around Rs 26,000 crore).
- HFCL has won a Rs 2,666 crore contract from RVNL, reinforcing its order book and execution pipeline.
- State Bank of India's board has approved raising up to Rs 60,000 crore via debt instruments in FY27, strengthening capital to support credit growth.
- Rusk Media raised Rs 100 crore in a funding round led by Nazara Technologies to scale content, platforms, and AI-led production capabilities.





Global market indices	18 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51564.7	0.14	3.78	11.27	22.27
Nikkei 225	71053.49	1.65	16.83	39.15	82.73
FTSE	10399.7	-1.04	0.74	2.19	17.60
Hang Seng	23924.81	-1.59	-6.82	-3.48	0.90
Taiwan	46465.2	1.28	13.63	46.47	107.84

Global debt	18 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.46	4.49	4.61	4.26	4.30	4.38
UK 10-Year (%)	4.76	4.75	5.06	4.74	4.88	4.50
German 10-Year (%)	2.92	2.93	3.16	2.94	3.01	2.50
Japan 10-Year (%)	2.61	2.60	2.73	2.21	2.35	1.45

Domestic	18 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	148093	-1.37	-6.12	0.93	48.91
Silver (Rs / Kg)	240191	-3.03	-10.39	4.37	119.53
Aluminium (Rs / Kg)	360	-0.76	-5.79	1.35	46.16
Copper (Rs / kg)	1325	-1.71	-2.18	13.17	49.63
Lead (Rs / kg)	210	1.16	1.35	6.57	13.26
Zinc (Rs /Kg)	371	-0.63	0.32	14.93	45.15
Nickel (Rs / kg)	1719	-0.09	-5.28	5.04	30.93

Global	18 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4361.24	0.61	-3.90	-3.68	28.67
Silver (oz/$)	7074.00	1.16	-6.42	0.38	90.88
Brent ($/bbl)	79.85	0.38	-28.77	-32.53	4.11
NYMEX crude ($/bbl)	76.60	-0.25	-29.50	-24.44	1.94

Upcoming market indicators

Date	Indicator	Previous
June 19	Japan Inflation Rate, May	1.4%
June 22	India Infrastructure Output, May	1.7%
June 25	US GDP Growth Rate QoQ Final Q1	0.5%
June 28	India Bank Loan Growth, Jun/12	17.7%
June 29	Eurozone Consumer Inflation Expectations, Jun	40.5

Global markets

- Wall Street stocks ended higher on Thursday buoyed by gains in semiconductor stocks and on easing inflation concerns after US-Iran signed an interim agreement that extends the April ceasefire by another 60 days.
- US 10yr yield ended lower at 4.46% as falling crude oil prices eased inflation concerns.
- FTSE index ended lower on Thursday led by fall in technology and miners stocks.
- Asian markets were trading mostly mixed at 8.30 AM.
- US Initial Jobless Claims eased by 4,000 to 226,000 in the second week of June compared to 230,000 in the previous period.
- US Philadelphia Fed Manufacturing Index improved to 10.3 in June 2026 compared to a 0.4 decline in May 2026.
- Eurozone Construction output increased 0.9% in April 2026 compared to 0.2% in March 2026.
- The UK GfK Consumer Confidence Index held steady at -23 in June 2026 unchanged from May.
- UK unemployment rate eased to 4.9% in April 2026 compared to 5% in March 2026.
- Japan's annual inflation rate edged higher to 1.5% in May 2026 from 1.4% in the previous month while core inflation remained steady at 1.4%.

Commodity

- Crude oil prices fell by 19 cents to $76.60 a barrel on the NYMEX after US-Iran 14-point agreement extended April ceasefire for 60 days.
- Domestic gold prices ended lower tracking weak global cues after the US Federal Reserve signalled a possible interest rate hike later this year.

Forthcoming results

NA	NA

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*

**Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers*

	Indicators	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25
Debt Indicators	Currency in circulation (Rs billion)	42826.4	42288.66	41320	40445	39800	39079	38551	38184	38071	38097
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.00%	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%
	Call rate	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%
	Forex reserves ($ billion; mthly. avg.)	689.49	700	703	724	696	692	688	699	701	693
	GDP	NA	NA	NA	7.80%			7.40%			
	Fiscal deficit (Rs billion)	NA	3623.03	2665.2	2712.42	1255.65	NA	3623.03	2665.2	2712.42	1255.65
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	NA	4.90%	4.10%	5.20%	4.80%
	Exports, $ billion	NA	43.56	38.92	36.61	36.56	NA	43.56	38.92	36.61	36.56
	Imports, $ billion	NA	71.94	59.59	63.71	71.24	NA	71.94	59.59	63.71	71.24
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55.00	54.70	53.90	56.9	55.4
	Services PMI	59.80	58.80	57.5	58.1	58.5	59.80	58.80	57.5	58.1	58.5
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	194,184	242,702	200064	183609	193384
	India crude oil import (mbpd)	NA	NA	19.00	19.43	21.09	NA	NA	19.00	19.43	21.09
Sector update	Auto – Passenger vehicles	NA	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%
	Auto – Two-wheelers	NA	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%
	Auto – Commercial vehicles	NA	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%
	Auto – Tractors	NA	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%
	Infra – Coal	NA	-4%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-12.30%
	Infra – Electricity	NA	-0.50%	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%
	Infra – Steel	NA	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%
	Infra – Cement	NA	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%

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