Daily Market Monitor

June 22, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	19 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24013	-0.64	1.67	7.53	-3.15
BSE Sensex	76803	-0.78	2.13	6.75	-5.60
BSE 100	25584	-0.58	2.23	9.30	-1.26
BSE 200	11247	-0.45	2.46	10.74	0.34
BSE 500	36175	-0.30	2.76	12.40	1.23
BSE SmallCap	55722	0.68	7.44	28.93	6.96
BSE MidCap	47806	0.40	3.37	17.93	6.37
BSE LargeCap	9469	-0.54	2.32	9.73	-0.51
Sectoral indices					
BSE IT	26829	-3.57	-5.45	-3.93	-29.25
BSE Oil & Gas	26479	-1.21	-0.68	3.60	-1.53
BSE FMCG	18414	-0.09	-1.81	9.78	-7.56
BSE Auto	58671	-0.61	3.73	11.51	11.77
BSE Bankex	65073	-0.43	8.14	15.01	3.80
BSE Teck	14628	-1.86	-3.57	-0.68	-20.12
BSE Capital Goods	83601	1.11	9.83	30.13	20.38
BSE Consumer Durable	61067	-0.05	6.23	16.05	6.83

Turnover (Rs Cr)	19 June	18 June
BSE Cash	10878	11460
NSE Cash	159982	133872
NSE F&O	15451291	8375732

Rs. Cr (Equity)	FII Inv 18 June	MF Inv 16 June	DII Inv 19 June
Buy	13,329	13,165	18,020
Sell	15,135	11,848	19,180
Net	-1,807	1,317	-1,160
Net (MTD)	-38,521	43,697	65,055
Net (YTD)	-283,139	288,918	441,840

	19 June	1Day	Month ago	Year ago
USD	94.47	94.28	96.35	86.70
GBP	124.60	125.58	129.23	116.16
Euro	108.03	108.65	112.18	99.34
100 Yen	58.55	58.69	60.58	59.69

RBI Reference Rate

Indian markets

- Indian equity benchmarks closed lower on Friday, weighed down by heavy selling in IT stocks amid weak global cues and renewed outflow of foreign funds.
- The top losers were Infosys, TCS, Tech Mahindra, HCL Technologies, and Mahindra & Mahindra, down 1.81-6.50%.
- The top gainers were Eternal, Bharti Airtel, Power Grid Corporation, Nestle India, and NTPC, up 1.05-2.05%.

Indian debt

- The interbank call-money rate ended higher at 5.30% on Friday compared to 4.80% on Thursday.
- Government bond prices ended lower on Friday, pressured by profit booking as the halt in US-Iran peace talks increased uncertainty.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.88% on Friday compared to 6.87% on Thursday.

Indian Rupee

- The spot rupee ended flat against the United States dollar on Friday as weakness in regional currencies and a stronger dollar offset gains from supportive measures taken by the Reserve Bank of India.

Regulatory

- According to the Reserve Bank of India monetary policy minutes, energy prices may not revert to pre-conflict levels, keeping inflation risks elevated.
- RBI MPC minutes highlighted risks from import dependence, Gulf remittances, and El Niño, indicating external vulnerabilities to growth and inflation.
- According to the RBI's Supervisory Data Quality Index (sDQI), Scheduled Commercial Banks' data quality declined marginally in the March 2026 quarter, indicating a slight dip in reporting standards.
- The Securities and Exchange Board of India (SEBI) has introduced a set of reforms to enhance market efficiency and investor protection, including reviving exchange-based buybacks, easing mutual fund borrowing, expediting AIF approvals, aligning securitised debt norms with RBI rules, simplifying municipal bond fundraising, and streamlining inheritance of securities.
- SEBI has approved the reintroduction of the open market window for buybacks, enhancing flexibility in capital management.

Economy and Government

- Prime Minister Narendra Modi is set to lay the foundation stone for a Rs 25,016 crore coal gasification project in Lakhanpur, Jharsuguda district, Odisha aimed at strengthening India's energy security and reducing dependence on imports.
- The government has approved Rs 150 crore assistance for India's first private hybrid 2G ethanol project in Uttar Pradesh, boosting biofuel development.
- The Centre has allocated a record Rs 10,000 crore budget for Bihar's railway infrastructure, boosting regional connectivity and capex.
- NHAI has launched Rajasthan's first barrier-free tolling system on the Delhi–Jaipur highway, enhancing traffic efficiency and digital tolling adoption.

Domestic Debt Market Indicators

Instrument	19 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.30%	4.80%	4.70%	5.40%	7.00%	4.90%
3-Month T-Bill	5.25%	5.25%	5.45%	5.32%	5.40%	5.34%
6-Month T-Bill	5.43%	5.45%	5.65%	5.53%	5.51%	5.44%
1-year T-Bill	5.76%	5.75%	5.79%	5.64%	5.70%	5.46%
3-Month CD	6.60%	6.60%	7.20%	7.30%	7.35%	5.90%
6-Month CD	7.10%	7.10%	7.32%	7.28%	7.30%	6.15%
1-year CD	7.40%	7.40%	7.65%	7.02%	7.25%	6.33%
3-Month CP	6.97%	6.97%	7.76%	7.58%	7.75%	6.25%
6-Month CP	7.45%	7.47%	7.90%	7.65%	7.65%	6.61%
1-year CP	7.70%	7.70%	8.05%	7.35%	7.60%	6.68%
1-year Gilt	5.74%	5.74%	6.10%	5.78%	5.82%	5.58%
3-year Gilt	6.24%	6.24%	6.61%	6.12%	6.43%	5.85%
5-year Gilt	6.50%	6.48%	6.90%	6.47%	6.90%	6.00%
1-year AAA	7.54%	7.54%	7.82%	7.35%	7.57%	6.66%
3-year AAA	7.38%	7.39%	7.92%	7.40%	7.59%	6.78%
5-year AAA	7.45%	7.45%	7.93%	7.42%	7.67%	6.84%
10-year G-sec	6.88%	6.87%	7.11%	6.73%	7.02%	6.31%
Net LAF (Rs Cr)	19163	4772	150872	27397	245161	314088
Forex reserves ($ bn)	671.63	681.61	696.99	716.81	642.49	696.66

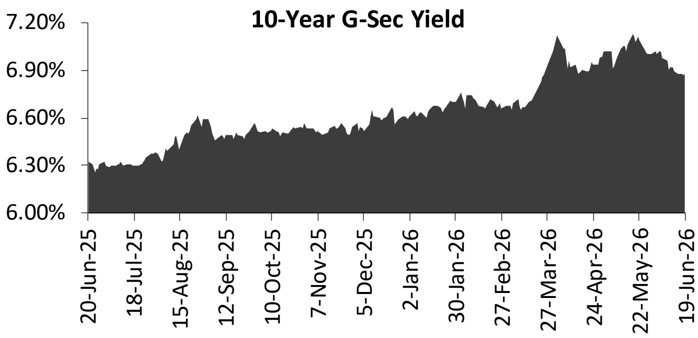
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.43	7.44	8.16	8.24	9.47	9.95
1 Year	5.74	7.54	8.26	8.34	9.57	10.05
3 Year	6.24	7.38	8.10	8.18	9.41	9.89
5 Year	6.50	7.45	8.27	8.35	9.58	10.06
10 Year	6.88	7.55	8.37	8.45	9.68	10.16

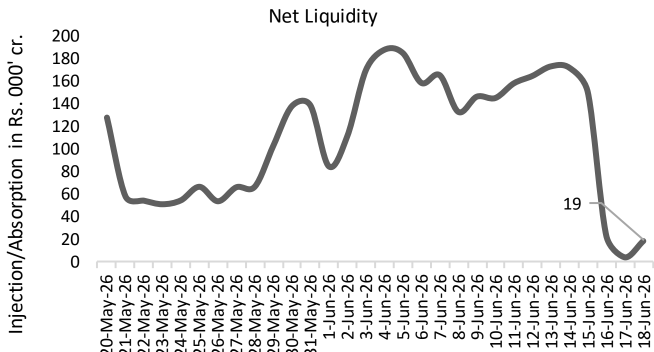
Rs. Cr (Debt)	FII Inv 18 June	MF Inv 17 June
Buy	969	17,278
Sell	705	25,397
Net	263	-8,119
Net (MTD)	8,853	-83,077
Net (YTD)	5,740	-469,086

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

- Mahindra Lifespace plans to invest Rs 5,600 crore in a major Mumbai housing project, strengthening its real estate pipeline and urban presence.
- IOC has commissioned a 150-kW rooftop solar system in Guwahati, supporting renewable energy adoption and sustainability goals.
- Hero MotoCorp plans to expand flex-fuel capability up to E100, aligning with alternative fuel and sustainability trends.
- VinFast India has partnered with Tata Capital to provide financing solutions for its dealer network, supporting EV market expansion.
- South Indian Bank raised FCNR deposit rates to 6.5% following RBI's swap window, aiming to attract foreign currency inflows.
- Jio Platforms filed its Draft Red Herring Prospectus (DRHP) with SEBI in connection with its proposed Initial Public Offering (IPO).





Global market indices	19 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA	NA
Nikkei 225	71250.06	0.28	17.67	39.53	85.12
FTSE	10363.27	-0.35	0.32	1.84	17.87
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	46465.2	0.00	15.66	46.47	111.17

Global debt	19 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	NA	4.46	4.67	4.25	4.30	4.38
UK 10-Year (%)	4.85	4.76	5.13	4.87	4.88	4.54
German 10-Year (%)	2.98	2.92	3.19	2.95	3.01	2.52
Japan 10-Year (%)	2.65	2.61	2.79	2.28	2.35	1.42

Domestic	19 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	144970	-2.11	-8.87	-1.20	46.05
Silver (Rs / Kg)	231973	-3.42	-13.67	0.80	116.02
Aluminium (Rs / Kg)	359	-0.21	-6.72	1.14	46.19
Copper (Rs / kg)	1330	0.40	-1.35	13.61	51.41
Lead (Rs / kg)	207	-1.71	-0.82	4.74	11.32
Zinc (Rs /Kg)	373	0.54	0.19	15.55	46.05
Nickel (Rs / kg)	1708	-0.63	-7.25	4.38	29.42

Global	19 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4226.31	-3.09	-7.19	-6.66	24.69
Silver (oz/$)	6620.00	-6.42	-14.10	-6.06	78.63
Brent ($/bbl)	80.57	0.90	-27.60	-31.92	5.05
NYMEX crude ($/bbl)	Closed	NA	NA	NA	NA

Upcoming market indicators

Date	Indicator	Previous
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
June 30	Japan Industrial Production YoY Prel, May	2.0%

Global markets

- index closed lower on Friday, dragged down due to US-Iran tensions and domestic political uncertainty.
- Asian markets were trading mostly higher at 8.30 AM.
- UK retail sales jumped 3.2% year-on-year in May 2026, compared to a revised 0.1% in April 2026.
- The People's Bank of China kept its key lending rates unchanged at record lows for the 13th straight month in June 2026, holding the one-year LPR at 3.0% and the five-year LPR at 3.5%, amid caution over Middle East tensions and slowing economic momentum.

Commodity

- Domestic gold prices declined due to weak demand.

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*

TATA mutual fund

	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%