Daily Market Monitor

June 23, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	22 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24103	0.37	1.62	7.93	-4.02
BSE Sensex	77094	0.38	2.23	7.15	-6.45
BSE 100	25685	0.39	2.10	9.73	-2.13
BSE 200	11293	0.41	2.22	11.20	-0.51
BSE 500	36342	0.46	2.62	12.93	0.51
BSE SmallCap	56190	0.84	7.23	30.01	7.28
BSE MidCap	48055	0.52	3.11	18.54	5.66
BSE LargeCap	9507	0.40	2.14	10.17	-1.37
Sectoral indices					
BSE IT	27015	0.69	-3.74	-3.27	-29.23
BSE Oil & Gas	26658	0.68	-1.72	4.30	-1.46
BSE FMCG	18357	-0.31	-1.04	9.44	-8.32
BSE Auto	58985	0.54	2.96	12.11	11.43
BSE Bankex	65360	0.44	7.32	15.52	3.07
BSE Teck	14719	0.62	-1.72	-0.06	-20.74
BSE Capital Goods	84063	0.55	7.34	30.85	19.67
BSE Consumer Durable	60428	-1.05	4.44	14.84	4.83

Turnover (Rs Cr)	22 June	19 June
BSE Cash	9561	10878
NSE Cash	118948	159982
NSE F&O	16512907	15451291

Rs. Cr (Equity)	FII Inv 19 June	MF Inv 18 June	DII Inv 22 June
Buy	33,372	12,135	17,392
Sell	27,845	9,021	16,356
Net	5,527	3,114	1,036
Net (MTD)	-32,994	46,811	66,091
Net (YTD)	-277,612	292,032	442,876

	22 June	1Day	Month ago	Year ago
USD	94.49	94.47	95.96	86.61
GBP	124.85	124.60	128.79	116.68
Euro	108.25	108.03	111.39	99.76
100 Yen	58.46	58.55	60.31	59.58

Indian markets

- Indian equity benchmarks ended higher on Monday, driven by gains in IT stocks, as broader risk appetite improved amid positive sentiment around the peace talks in the Middle East and softer oil prices.
- The top gainers were Cipla, Tech Mahindra, Dr. Reddy's Laboratories, Bajaj Auto and Sun Pharmaceutical Industries—up 1.40-4.82%.
- The top losers were Asian Paints, Titan Company, Nestle India, Shriram Finance and Trent—down 0.93-2.20%.

Indian debt

- The interbank call-money rate ended higher at 5.40% on Monday compared to 5.30% on Friday.
- Government bond prices ended marginally higher on Monday, supported by short covering, amid tight liquidity.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.87% on Monday compared to 6.88% on Friday.

Indian Rupee

- The spot rupee ended lower against the United States dollar on Monday as the US dollar index rose to a one-year high against a basket of peers.

Regulatory

- SEBI has proposed a revamp of technology regulations for stock exchanges, aiming to strengthen market infrastructure and operational resilience.
- SEBI is considering a comprehensive consolidation of technology and cybersecurity norms across market institutions, aiming to create a uniform regulatory framework for exchanges, clearing corporations, and intermediaries.
- The PFRDA has launched an AI-enabled grievance redressal platform for its subscribers, making pension services more inclusive and accessible.

Economy and Government

- India's infrastructure output growth slowed to 0.5% in May 2026 from an upwardly revised 1.8% (from 1.7% earlier) in April, indicating moderation in core sector activity.
- The World Bank has approved a $1.5 billion loan for India, aimed at boosting job creation and supporting economic reforms.
- India has imposed anti-dumping duties on certain chemical imports from China, EU, and the US, protecting domestic industry.
- Commerce Minister Piyush Goyal India is pushing for preferential market access in the US trade deal, aiming to strengthen bilateral trade and export competitiveness.
- West Bengal Finance Minister Swapan Dasgupta announced a significant Rs 36,000 crore for the Annapurna Yojna, assuring continuity of existing social schemes.
- West Bengal is planning a new law to curb syndicate charges, improving ease of doing business and reducing informal costs.
- Andhra Pradesh has allocated Rs 800 crore for development of 692 ancient temples, supporting heritage conservation and tourism.

Domestic Debt Market Indicators

Instrument	22 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.30%	5.37%	5.35%	7.00%	5.30%
3-Month T-Bill	5.25%	5.25%	5.54%	5.32%	5.40%	5.34%
6-Month T-Bill	5.43%	5.43%	5.82%	5.50%	5.51%	5.43%
1-year T-Bill	5.76%	5.76%	5.93%	5.62%	5.70%	5.47%
3-Month CD	6.60%	6.60%	7.40%	7.30%	7.35%	5.86%
6-Month CD	7.09%	7.10%	7.75%	7.25%	7.30%	6.14%
1-year CD	7.40%	7.40%	7.95%	7.08%	7.25%	6.33%
3-Month CP	6.95%	6.97%	8.05%	7.58%	7.75%	6.23%
6-Month CP	7.45%	7.45%	8.15%	7.65%	7.65%	6.61%
1-year CP	7.70%	7.70%	8.30%	7.45%	7.60%	6.76%
1-year Gilt	5.73%	5.74%	6.25%	5.74%	5.82%	5.55%
3-year Gilt	6.26%	6.24%	6.69%	6.17%	6.43%	5.86%
5-year Gilt	6.49%	6.50%	6.93%	6.48%	6.90%	6.02%
1-year AAA	7.53%	7.54%	8.02%	7.37%	7.57%	6.70%
3-year AAA	7.38%	7.38%	7.94%	7.43%	7.59%	6.82%
5-year AAA	7.45%	7.45%	7.93%	7.44%	7.67%	6.88%
10-year G-sec	6.87%	6.88%	7.09%	6.74%	7.02%	6.32%
Net LAF (Rs Cr)	30685	32203	54977	-6226	245161	294195
Forex reserves ($ bn)	671.63	681.61	688.89	709.76	642.49	698.95

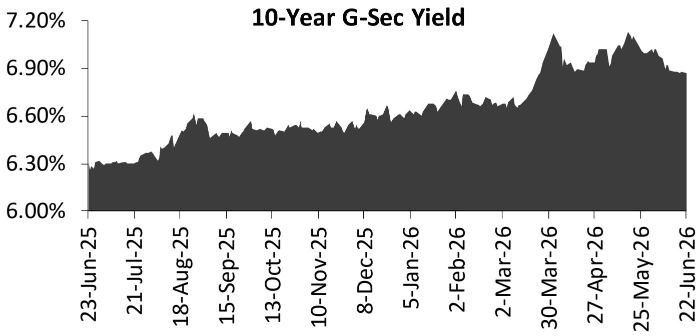
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.43	7.37	8.09	8.17	9.40	9.88
1 Year	5.73	7.53	8.25	8.33	9.56	10.04
3 Year	6.26	7.38	8.10	8.18	9.41	9.89
5 Year	6.49	7.45	8.27	8.35	9.58	10.06
10 Year	6.87	7.55	8.37	8.45	9.68	10.16

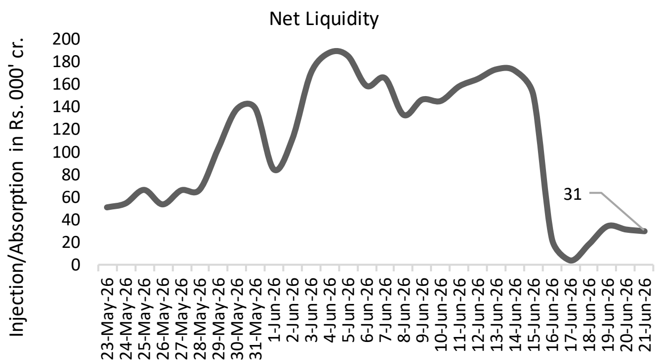
Rs. Cr (Debt)	FII Inv 19 June	MF Inv 18 June
Buy	9,442	30,421
Sell	2,574	33,198
Net	6,868	-2,777
Net (MTD)	15,722	-85,854
Net (YTD)	12,608	-471,863

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

- The Indian Institute of Technology Roorkee (IITRoorkee), in collaboration with IvyCap Ventures & NuQuant, has announced the launch of a Super Endowment Fund with a target corpus of approximately Rs 1,000 crore.
- Yotta has announced an additional $6 billion investment to scale AI and data centre infrastructure, strengthening India's AI ecosystem and digital capacity.
- Air India and Booking.com have entered a strategic partnership to offer integrated travel and accommodation bookings.
- Resonia secured a transmission project in Telangana from Power Finance Corporation, supporting renewable energy integration and strengthening its infrastructure order book.
- The Aditya Birla Group has launched the INT Aditya Birla Performing Arts Academy, a new institution dedicated to fostering talent in theatre, music, and dance
- ArcelorMittal partnered with Amazon Web Services (AWS) to automate global operations, enhancing efficiency through digital and cloud capabilities.
- Krafton India made a strategic investment in BITKRAFT Ventures' global fund, expanding its exposure to the gaming and digital entertainment ecosystem.





Global market indices	22 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51712.71	0.29	2.24	11.59	22.52
Nikkei 225	72353.96	1.55	14.23	41.69	88.41
FTSE	10437.85	0.72	-0.27	2.57	18.95
Hang Seng	23768.52	-0.65	-7.18	-4.11	1.01
Taiwan	47741.51	2.75	12.95	50.49	116.56

Global debt	22 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.51	4.46	4.56	4.39	4.30	4.38
UK 10-Year (%)	4.81	4.85	4.91	5.00	4.88	4.52
German 10-Year (%)	2.95	2.98	3.03	3.04	3.01	2.51
Japan 10-Year (%)	2.68	2.65	2.76	2.26	2.35	1.41

Domestic	22 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147310	1.61	-6.83	0.39	49.26
Silver (Rs / Kg)	237801	2.51	-10.60	3.33	122.71
Aluminium (Rs / Kg)	361	0.53	-7.22	1.67	47.29
Copper (Rs / kg)	1337	0.47	-2.40	14.15	51.64
Lead (Rs / kg)	207	0.24	-3.27	5.00	10.78
Zinc (Rs /Kg)	373	-0.01	-0.41	15.54	45.83
Nickel (Rs / kg)	1715	0.41	-5.27	4.81	30.26

Global	22 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4141.45	-2.01	-8.80	-8.53	22.75
Silver (oz/$)	6407.00	-3.22	-16.08	-9.08	75.97
Brent ($/bbl)	77.90	-3.31	-24.76	-34.18	1.16
NYMEX crude ($/bbl)	73.86	-3.58	-23.54	-27.15	0.03

Upcoming market indicators

Date	Indicator	Previous
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%
July 1	Eurozone Inflation Rate YoY Flash, Jun	3.2%

Global markets

- Wall Street stocks closed mixed on Monday, with Dow Jones gaining on the back of strength in healthcare and industrial sectors, while Nasdaq declined due to weakness in technology stocks.
- 10-year US bond yield ended higher at 4.51% with investors focusing on key inflation data due to be released Thursday.
- FTSE index closed marginally higher on Monday, driven by gains in banking stocks, as investors remained cautious due to political uncertainty following the Prime Minister's resignation.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone flash consumer confidence declined to 17.7 in June 2026 compared to a drop of 19 in May 2026.
- Japan S&P Global Flash Manufacturing PMI increased to 54.9 in June 2026 compared to 54.5 in May 2026 while the S&P Global Flash Services PMI rose to 51.8 from 50.0 and the S&P Global Flash Composite PMI rose to 52.5 from 51.1.

Commodity

- Crude oil prices fell by $2.74 to $73.86 a barrel on the NYMEX as progress in US-Iran talks and confirmation that the Strait of Hormuz remained open eased supply concerns.
- Domestic gold prices ended higher due value buying.

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%