Daily Market Monitor

June 24, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	23 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23824	-1.16	0.44	6.68	-4.60
BSE Sensex	76201	-1.16	1.04	5.91	-6.96
BSE 100	25390	-1.15	0.92	8.48	-2.84
BSE 200	11166	-1.13	1.06	9.94	-1.30
BSE 500	35960	-1.05	1.54	11.74	-0.36
BSE SmallCap	55778	-0.73	6.45	29.06	5.88
BSE MidCap	47629	-0.89	2.19	17.50	4.52
BSE LargeCap	9399	-1.14	0.97	8.92	-2.09
Sectoral indices					
BSE IT	26409	-2.24	-5.90	-5.43	-29.79
BSE Oil & Gas	26448	-0.79	-2.49	3.48	-2.53
BSE FMCG	18240	-0.64	-1.68	8.74	-8.33
BSE Auto	58478	-0.86	2.07	11.15	11.46
BSE Bankex	64432	-1.42	5.79	13.88	1.99
BSE Teck	14432	-1.95	-3.64	-2.01	-21.43
BSE Capital Goods	83019	-1.24	6.00	29.23	17.09
BSE Consumer Durable	59603	-1.37	3.02	13.27	3.01

Turnover (Rs Cr)	23 June	22 June
BSE Cash	9984	9561
NSE Cash	131784	118948
NSE F&O	70906079	16512907

Rs. Cr (Equity)	FII Inv 22 June	MF Inv 19 June	DII Inv 23 June
Buy	11,374	13,613	16,863
Sell	11,042	15,588	16,183
Net	332	-1,975	680
Net (MTD)	-32,662	44,835	66,771
Net (YTD)	-277,280	290,057	443,556

	23 June	1Day	Month ago	Year ago
USD	94.71	94.49	95.96	86.81
GBP	125.39	124.85	128.79	116.65
Euro	108.20	108.25	111.39	99.90
100 Yen	58.58	58.46	60.31	58.96

Indian markets

- Indian equity benchmarks ended lower on Tuesday, dragged down by profit booking after the recent rally, weak IT stocks and continued foreign fund outflows. Sentiment was further dampened by weak flash Purchasing Managers' Index data, monsoon concerns and cautious global cues.
- The top losers were Infosys, Wipro, Tata Consultancy Services, Adani Enterprises and JSW Steel, down 3.10% - 3.42%.
- The top gainers were Cipla, Power Grid Corporation of India, Dr Reddy's Laboratories, Asian Paints, and Sun Pharmaceutical Industries, up 0.22% - 1.36%.

Indian debt

- The interbank call-money rate ended lower at 4.85% on Tuesday compared to 5.40% on Monday.
- Government bond prices were unchanged on Tuesday, as support from lower oil prices and easing geopolitical tensions was offset by inflation and currency concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.87% on Tuesday.

Indian Rupee

- The spot rupee ended lower against the US dollar on Tuesday, as the dollar gained sharply against a basket of peers amid expectations of a policy rate hike by the US Federal Reserve (Fed).

Regulatory

- The Reserve Bank of India (RBI) has rescinded restrictions on specific categories of rupee derivative transactions that were implemented in April 2025 to combat the Indian rupee's depreciation to historic lows.
- RBI data showed, India's outward foreign direct investment (FDI) rose by 27.5% to $7.06 billion in March 2026 from $5.54 billion in the same month last year. Sequentially, it surged from $2.96 billion in February 2026.
- The Reserve Bank of India (RBI) has announced that multiple state governments will raise a total of Rs 16,900 crore through the revised auction of State Government Securities (SGS), scheduled to be conducted on April 21.
- The Securities and Exchange Board of India (SEBI) has granted approval for the Multi Commodity Exchange (MCX) to invest in a proposed coal exchange company.

Economy and Government

- India HSBC Flash Manufacturing PMI fell to 54.5 in June 2026 from 55.0 in May 2026 while the HSBC Flash Services PMI declined to 57.3 in June 2026 from 58.9 and the HSBC Flash Composite PMI edged down to 57.4 from 59.3.
- The government has revised FCRA rules and tightened penalties for foreign-funded NGOs, enhancing regulatory oversight and compliance requirements.
- The Commerce Ministry has called for government-level discussions on concerns related to metal scrap trade, aiming to address supply and policy issues impacting the sector.

Domestic Debt Market Indicators

Instrument	23 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.85%	5.40%	5.37%	5.25%	7.00%	5.25%
3-Month T-Bill	5.25%	5.25%	5.54%	5.33%	5.40%	5.34%
6-Month T-Bill	5.42%	5.43%	5.82%	5.50%	5.51%	5.43%
1-year T-Bill	5.76%	5.76%	5.93%	5.65%	5.70%	5.47%
3-Month CD	6.60%	6.60%	7.40%	7.47%	7.35%	5.85%
6-Month CD	7.09%	7.09%	7.75%	7.40%	7.30%	6.11%
1-year CD	7.40%	7.40%	7.95%	7.25%	7.25%	6.33%
3-Month CP	6.95%	6.95%	8.05%	7.72%	7.75%	6.23%
6-Month CP	7.45%	7.45%	8.15%	7.73%	7.65%	6.55%
1-year CP	7.70%	7.70%	8.30%	7.60%	7.60%	6.76%
1-year Gilt	5.73%	5.73%	6.25%	5.83%	5.82%	5.57%
3-year Gilt	6.23%	6.26%	6.69%	6.23%	6.43%	5.86%
5-year Gilt	6.48%	6.49%	6.93%	6.57%	6.90%	6.03%
1-year AAA	7.56%	7.53%	8.02%	7.45%	7.57%	6.58%
3-year AAA	7.37%	7.38%	7.94%	7.51%	7.59%	6.70%
5-year AAA	7.44%	7.45%	7.93%	7.52%	7.67%	6.76%
10-year G-sec	6.86%	6.87%	7.09%	6.83%	7.02%	6.31%
Net LAF (Rs Cr)	-19972	30685	54977	26196	245161	243748
Forex reserves ($ bn)	671.63	681.61	688.89	709.76	642.49	698.95

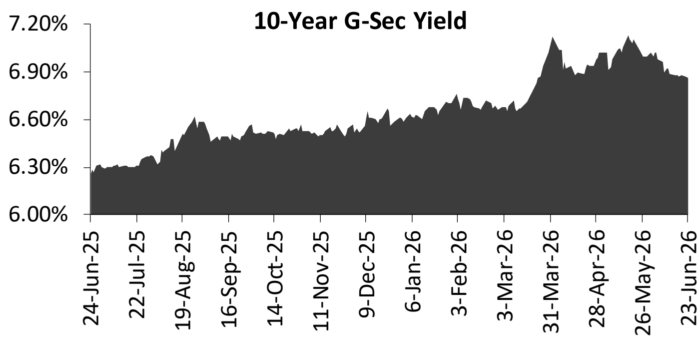
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.42	7.32	8.04	8.12	9.35	9.83
1 Year	5.73	7.56	8.28	8.36	9.59	10.07
3 Year	6.23	7.37	8.09	8.17	9.40	9.88
5 Year	6.48	7.44	8.26	8.34	9.57	10.05
10 Year	6.86	7.54	8.36	8.44	9.67	10.15

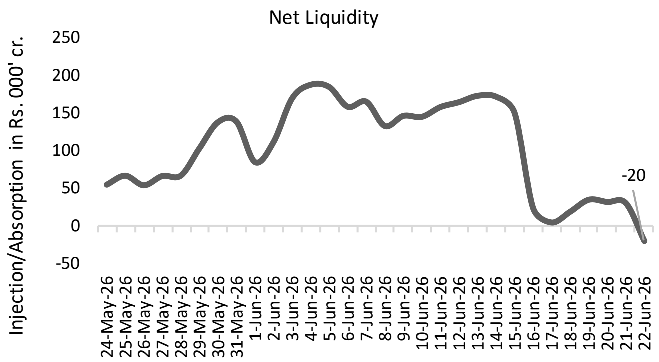
Rs. Cr (Debt)	FII Inv 22 June	MF Inv 19 June
Buy	1,090	32,009
Sell	160	31,118
Net	929	891
Net (MTD)	16,651	-84,963
Net (YTD)	13,537	-470,972

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

- Square Yards raised Rs 900 crore from investors including EAAA Alternatives and Muzinich & Co., achieving unicorn status and strengthening its growth ahead of a planned Rs 2,000 crore IPO.
- LiLLBUD raised Rs 6 crore in a seed round led by Zeropearl VC, to scale its BIS-certified developmental toy portfolio and expand distribution.
- Meta has invested $900 million in CRED at a $4.5 billion valuation, acquiring a 20% stake to accelerate digital payments and integrate fintech services via WhatsApp.
- Kaleidofin Capital secured a $5 million debt facility, strengthening its lending capacity in the fintech ecosystem.





Global market indices	23 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51666.84	-0.09	2.15	11.49	21.34
Nikkei 225	69788.38	-3.55	10.18	36.67	81.96
FTSE	10428.85	-0.09	-0.36	2.48	19.08
Hang Seng	23336.28	-1.82	-8.86	-5.86	-1.49
Taiwan	47100.65	-1.34	11.43	48.47	116.73

Global debt	23 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.50	4.51	4.56	4.34	4.30	4.34
UK 10-Year (%)	4.76	4.81	4.91	4.90	4.88	4.49
German 10-Year (%)	2.92	2.95	3.03	3.02	3.01	2.51
Japan 10-Year (%)	2.67	2.68	2.76	2.29	2.35	1.41

Domestic	23 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	144995	-1.57	-8.30	-1.18	45.95
Silver (Rs / Kg)	227483	-4.34	-14.48	-1.15	112.48
Aluminium (Rs / Kg)	350	-3.04	-10.04	-1.42	39.42
Copper (Rs / kg)	1304	-2.44	-4.78	11.36	46.25
Lead (Rs / kg)	208	0.27	-3.01	5.28	11.02
Zinc (Rs /Kg)	367	-1.53	-1.94	13.77	42.73
Nickel (Rs / kg)	1696	-1.13	-6.34	3.63	29.49

Global	23 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4184.35	1.04	-7.86	-7.58	24.21
Silver (oz/$)	6545.00	2.15	-14.28	-7.12	81.70
Brent ($/bbl)	77.08	-1.05	-25.56	-34.87	7.83
NYMEX crude ($/bbl)	73.21	-0.88	-24.21	-27.79	6.86

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 lower on Tuesday led by fall in semiconductor, AI-linked stocks and growing expectations of a potential rate hike by Federal Reserve.
- 10-year US bond yield ended lower at 4.50% as investors remained cautious ahead of release of US inflation data.
- FTSE index closed lower on Tuesday due to political turmoil surrounding Britain's next leadership and potential US Fed rate hike fear.
- Asian markets were trading mostly higher at 8.30 AM.
- US S&P Global Flash Manufacturing PMI edged higher to 55.7 in June 2026 compared to 55.1 in May 2026 while the S&P Global Flash Services PMI improved to 51.3 from 50.7 and the S&P Global Flash Composite PMI increased to 52.2 from 51.5.
- US Richmond Fed Manufacturing Index decreased to 4 in June 2026, compared to 13 in May 2026.
- Eurozone S&P Global Flash Manufacturing PMI edged down to 51.3 in June 2026 compared to 51.6 in May 2026 while the S&P Global Flash Services PMI improved to 48.9 from 47.7 and the S&P Global Flash Composite PMI increased to 49.5 from 48.5.
- UK S&P Global Flash Manufacturing PMI eased to 53.1 in June 2026, compared with 53.9 in May 2026 while the S&P Global Flash Services PMI fell to 48.7 from 49.3 and the S&P Global Flash Composite PMI eased to 49.4 from 49.7 in May.

Commodity

- Crude oil prices fell by 65 cents to $73.21 a barrel on the NYMEX as progress in US-Iran peace talks and steady crude flows through the Strait of Hormuz eased supply concerns.
- Domestic gold prices declined, tracking weak global cues amid strong dollar index.

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%