

Daily Market Monitor

June 02, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	1 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23383	-0.70	-2.56	4.71	-5.53
BSE Sensex	74267	-0.68	-3.44	3.22	-8.82
BSE 100	24850	-0.84	-2.14	6.17	-4.20
BSE 200	10928	-0.98	-1.60	7.60	-2.74
BSE 500	35078	-0.96	-1.23	9.00	-2.06
BSE SmallCap	52507	-0.89	1.57	21.49	0.18
BSE MidCap	46273	-1.25	0.30	14.15	2.52
BSE LargeCap	9206	-11.26	-1.89	6.68	-3.45
Sectoral indices					
BSE IT	28839	2.39	1.52	3.27	-21.83
BSE Oil & Gas	26612	-0.48	-3.87	4.12	-1.55
BSE FMCG	17897	-2.02	-5.26	6.69	-11.88
BSE Auto	57059	-1.59	-0.20	8.45	9.05
BSE Bankex	60424	-1.16	-2.08	6.79	-4.32
BSE Teck	15131	1.56	0.72	2.74	-15.45
BSE Capital Goods	78849	-2.44	2.12	22.73	10.91
BSE Consumer Durable	56885	-1.39	-3.75	8.11	-1.83

Turnover (Rs Cr)	1 June	29 May
BSE Cash	8874	12770
NSE Cash	132672	287452
NSE F&O	16722975	16722975

Rs. Cr (Equity)	FII Inv 29 May	MF Inv 27 May	DII Inv 1 June
Buy	93,248	13,839	15,226
Sell	115,198	10,775	10,117
Net	-21,949	3,064	5,109
Net (MTD)	-46,889	48,247	5,109
Net (YTD)	-244,618	230,381	381,894

	1 June	1Day	Month ago	Year ago
USD	94.89	95.38	95.24	85.48
GBP	127.77	128.18	128.20	115.14
Euro	110.59	111.11	111.07	96.94
100 Yen	59.50	59.89	59.28	59.36

Indian markets

- Indian equity benchmarks closed lower on Monday due to ongoing foreign institutional investor outflows and concerns over the Iran-US conflict.
- The top losers were Hindustan Unilever, Tata Consumer Products, ITC, Shriram Finance and Mahindra & Mahindra, down 2.48%-2.87%.
- The top gainers were Tech Mahindra, Infosys, Coal India, JSW Steel and Tata Consultancy Services, up 1.66%-3.71%.

Indian debt

- The interbank call-money rate ended lower at 4.85% on Monday compared to 5.55% on Friday.
- Government bond prices ended lower on Monday due to intermittent spike in global crude oil prices raised rate hike concerns ahead of RBI policy decision due on June 5, 2026.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.02% on Monday compared to 7.00% on Friday.

Indian Rupee

- The spot rupee ended flat against the US dollar on Monday, as investors remained on the sideline ahead of the upcoming monetary policy decision from the Reserve Bank of India.

Regulatory

- The Reserve Bank has launched the 2025-26 round of its annual survey on 'Foreign Liabilities and Assets of Mutual Funds,' collecting data from mutual funds on their external liabilities and assets as of end-March 2026, with the results used for India's external sector statistics and publicly disseminated.
- SEBI is considering allowing InvITs to include major road expenses in their NDCF calculations to better reflect true cash flows, which could enhance investor confidence and make InvITs more attractive for infrastructure investments..

Economy and Government

- India gross GST collections for May 2026 stood at Rs 1.94 lakh crore, reflecting a 3.2% year-on-year increase compared to May 2025, driven by higher goods and services supplies, stronger import tax collections, and resilient domestic demand.
- India HSBC Manufacturing PMI rose to 55.0 in May 2026, compared to 54.7 in April 2026.
- India industrial output grew by 4.9% in April 2026, compared to 4.1% in March 2026, driven by robust manufacturing despite energy price pressures and rupee volatility.
- According to government data, India's fiscal deficit in FY26 was Rs 15.19 lakh crore, or 97.5% of the revised target, and met the budgeted 4.4% of GDP, while in April 2026 alone, the deficit sharply increased to Rs 3.6 trillion, nearly doubling from Rs 1.9 trillion a year earlier, primarily due to rising fuel subsidy costs amid high oil prices linked to Middle East tensions.
- India and Oman's free trade agreement has come into force, enhancing trade relations and reducing tariffs on various goods between the two countries.

Domestic Debt Market Indicators

Instrument	1 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.85%	5.55%	5.20%	5.12%	7.00%	5.75%
3-Month T-Bill	5.53%	5.53%	5.28%	5.29%	5.40%	5.60%
6-Month T-Bill	5.72%	5.70%	5.46%	5.41%	5.51%	5.60%
1-year T-Bill	5.95%	5.98%	5.65%	5.53%	5.70%	5.61%
3-Month CD	7.18%	7.21%	6.45%	7.00%	7.35%	6.10%
6-Month CD	7.65%	7.70%	6.95%	7.00%	7.30%	6.45%
1-year CD	7.85%	7.90%	7.40%	6.85%	7.25%	6.51%
3-Month CP	7.90%	8.00%	7.00%	7.50%	7.75%	6.43%
6-Month CP	8.10%	8.13%	7.35%	7.50%	7.65%	6.90%
1-year CP	8.27%	8.35%	7.75%	7.25%	7.60%	6.90%
1-year Gilt	6.09%	6.06%	5.98%	5.54%	5.82%	5.66%
3-year Gilt	6.54%	6.52%	6.44%	5.85%	6.43%	5.74%
5-year Gilt	6.83%	6.82%	6.76%	6.38%	6.90%	5.86%
1-year AAA	7.96%	7.95%	7.42%	7.08%	7.57%	6.57%
3-year AAA	7.86%	7.84%	7.70%	7.15%	7.59%	6.61%
5-year AAA	7.84%	7.84%	7.72%	7.24%	7.67%	6.73%
10-year G-sec	7.02%	7.00%	7.02%	6.66%	7.02%	6.27%
Net LAF (Rs Cr)	139480	138778	258015	335476	245161	210242
Forex reserves (\$ bn)	681.38	688.89	698.49	723.61	642.49	590.29

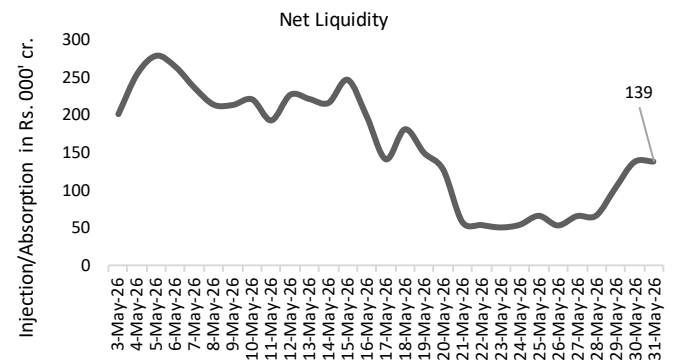
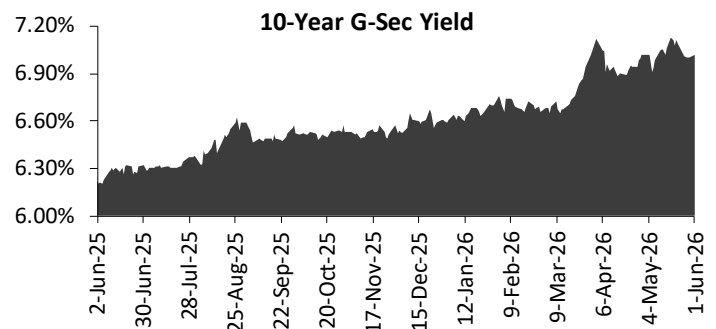
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.72	7.87	8.61	8.66	9.89	10.37
1 Year	6.09	7.96	8.70	8.75	9.98	10.46
3 Year	6.54	7.86	8.60	8.65	9.88	10.36
5 Year	6.83	7.84	8.68	8.73	9.96	10.44
10 Year	7.02	7.83	8.67	8.72	9.95	10.43

Rs. Cr (Debt)	FII Inv 29 May	MF Inv 27 May
Buy	575	17,939
Sell	1,324	22,886
Net	-749	-4,947
Net (MTD)	-924	-65,271
Net (YTD)	-3,113	-377,885

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.48% (Apr-26)	2.74% (Jan'26)	3.16% (Apr-25)
WPI	8.30% (Apr-26)	1.81% (Jan'25)	0.85% (Apr-25)
IIP	4.1% (Mar'26)	8.0% (Dec'25)	3.9% (Mar'25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	54.7 (Apr-26)	55.4 (Jan-26)	58.2 (Apr-25)
India Service PMI	58.8 (Apr-26)	58.5 (Jan-26)	58.7 (Apr-25)
Bank Credit Growth*	-0.68% (May 15, 2026)		0.84% (April 30, 2026)
Bank Deposit Growth*	-0.12% (May 15, 2026)		1.39% (April 30, 2026)

Capital markets

- KorinMi raised Rs 10 crore from Lotus Herbals to expand its Korean skincare treatments and direct-to-consumer products in India, aiming to bring authentic Korean skin solutions to Indian consumers
- The NSE introduces the Closing Auction Session (CAS) framework in the equity derivatives segment starting August 3, 2026, extending the market closing time by 10 minutes to 3:40 pm.
- Anant Raj signed an MoU with Haryana to invest Rs 20,000 crore in data centers, boosting the state's digital infrastructure development.
- Aavaada Group secured \$950 million in debt financing for its largest-ever FDRE project in Bikaner, Rajasthan, along with two 300 MW solar projects in Rajasthan and Gujarat.
- Puravankara Ltd secured an 11.23-acre land parcel in Doddagubbi, North Bengaluru, through a joint development agreement valued at Rs 1,100 crore, to develop residential apartments covering 0.74 million sq ft, strengthening its presence in Bengaluru and aiming for significant sales growth.



Global market indices	1 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51078.88	0.09	2.87	10.22	20.84
Nikkei 225	66934.33	0.91	12.90	31.08	76.30
FTSE	10338.95	-0.68	-0.38	1.60	17.86
Hang Seng	25398.18	0.86	-1.47	2.46	9.05
Taiwan	45337.91	1.35	16.47	42.92	112.38

Global debt	1 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.47	4.45	4.40	3.97	4.30	4.41
UK 10-Year (%)	4.88	4.81	5.03	4.31	4.88	4.64
German 10-Year (%)	3.01	2.93	3.03	2.65	3.01	2.51
Japan 10-Year (%)	2.68	2.66	2.52	2.11	2.35	1.50

Domestic	1 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	155536	-0.59	3.51	6.00	63.11
Silver (Rs / Kg)	263250	-0.04	9.54	14.39	170.12
Aluminium (Rs / Kg)	391	0.75	6.82	9.92	64.46
Copper (Rs / kg)	1369	0.95	7.02	16.91	57.77
Lead (Rs / kg)	209	-0.55	1.88	5.76	13.22
Zinc (Rs /Kg)	372	-0.17	7.09	15.12	45.16
Nickel (Rs / kg)	1838	0.30	-0.47	12.28	38.02

Global	1 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4523.20	0.47	-0.53	-0.10	36.18
Silver (oz/\$)	7401.00	-2.19	3.38	5.02	122.12
Brent (\$/bbl)	94.98	4.24	-16.69	-19.75	51.29
NYMEX crude (\$/bbl)	92.16	5.49	-12.29	-9.09	51.60

Global markets

- Wall Street stocks closed higher on Monday, boosted by a rally in technology stocks driven by AI-optimism.
- 10-year US bond yield ended higher at 4.47% as resurfacing geopolitical concerns reignited inflation fears and lingering uncertainty regarding Federal Reserve interest rate policy.
- FTSE index closed lower on Monday as investors assessed fresh signs of economic strain from the Middle east conflict.
- Asian markets were trading mostly lower at 8.30 AM.
- US S&P Global Manufacturing PMI rose to 55.1 in May 2026, compared to 54.5 in April 2026.
- US ISM Manufacturing PMI rose to 54.0 in May 2026 compared to 52.7 in April 2026.
- Eurozone Consumer Inflation Expectations remained steady at 4% in April 2026 compared to March 2026.
- Eurozone S&P Global Manufacturing PMI fell to 51.6 in May 2026 compared to 52.2 in April 2026.
- Eurozone unemployment rate remained steady at 6.3% in April 2026, unchanged from the previous month.

Commodity

- Crude oil prices rose by \$1 to \$58.32 a barrel on the NYMEX due to supply concerns amid potential disruptions to Venezuelan crude flows after rising tensions with the US.
- Domestic gold prices declined due to strong dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
June 2	Eurozone Inflation Rate YoY Flash, May	3%
June 3	Eurozone PPI, Apr	2.1%
June 5	UK Halifax House Price Index, May	0.4%
June 8	Japan GDP Growth Rate QoQ Final Q1	0.2%
June 10	Eurozone Inflation Rate, May	1.2%

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		Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	Jun-25
Debt Indicators	Currency in circulation (Rs billion)	42288.66	41320	40445	39800	39079	38551	38184	38071	38097	38147	38372
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.02%	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%
	Call rate	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%
	Forex reserves (\$ billion; mthly. avg.)	700	703	724	696	692	688	699	701	693	698	699

GDP	GDP	NA	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	NA	2712.42	1255.65	-1208.29	1515.27	NA	NA	2712.42	1255.65	-1208.29
	IIP, %y/y	NA	4.10%	5.20%	4.80%	8.00%	7.20%	NA	4.10%	5.20%	4.80%	8.00%
	Exports, \$ billion	NA	38.92	36.61	36.56	38.51	38.13	NA	38.92	36.61	36.56	38.51
	Imports, \$ billion	NA	59.59	63.71	71.24	63.55	62.66	NA	59.59	63.71	71.24	63.55
	Manufacturing PMI	54.7	53.90	56.9	55.4	55	56.6	54.7	53.90	56.9	55.4	55
	Services PMI	58.8	57.5	58.1	58.5	58	59.8	58.8	57.5	58.1	58.5	58
	GST collections (Rs crore)	242,702	200064	183609	193384	174550	170276	242,702	200064	183609	193384	174550
	India crude oil import (mbpd)	NA	19.00	19.43	21.09	21.59	21.24	NA	19.00	19.43	21.09	21.59

Sector update	Auto – Passenger vehicles	NA	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	
	Auto – Two-wheelers	NA	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	
	Auto – Commercial vehicles	NA	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	
	Auto – Tractors	NA	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	
	Infra – Coal	NA	-4%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-	12.30%	-6.80%
	Infra – Electricity	NA	-0.50%	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%	
	Infra – Steel	NA	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%	
	Infra – Cement	NA	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%	

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