

# Daily Market Monitor

June 05, 2026

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	4 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23417	0.05	-2.91	4.86	-4.89
BSE Sensex	74360	0.02	-3.77	3.35	-8.20
BSE 100	24880	0.09	-2.51	6.30	-3.69
BSE 200	10945	0.13	-2.00	7.77	-2.36
BSE 500	35176	0.19	-1.58	9.30	-1.72
BSE SmallCap	53375	0.77	2.10	23.50	0.96
BSE MidCap	46325	0.32	-0.21	14.28	1.81
BSE LargeCap	9223	0.10	-2.27	6.88	-2.87
Sectoral indices					
BSE IT	28459	-0.48	0.97	1.91	-22.16
BSE Oil & Gas	26671	0.57	-3.63	4.35	-0.78
BSE FMCG	17890	0.17	-5.73	6.65	-12.24
BSE Auto	57622	0.25	0.36	9.52	10.10
BSE Bankex	61238	0.23	-0.90	8.23	-2.34
BSE Teck	15041	-0.35	-2.93	2.13	-15.63
BSE Capital Goods	80156	1.01	2.68	24.77	13.35
BSE Consumer Durable	58390	1.94	-1.51	10.97	1.38

Turnover (Rs Cr)	4 June	3 June
BSE Cash	9460	8559
NSE Cash	128984	135352
NSE F&O	8544029	10653562

Rs. Cr (Equity)	FII Inv 3 June	MF Inv 1 June	DII Inv 4 June
Buy	17,671	11,813	16,824
Sell	22,737	8,323	12,464
Net	-5,066	3,490	4,360
Net (MTD)	-16,902	3,490	24,799
Net (YTD)	-261,520	248,712	401,584

	4 June	1Day	Month ago	Year ago
USD	95.74	95.78	94.94	85.96
GBP	128.60	128.78	129.03	116.14
Euro	111.19	111.26	111.39	97.71
100 Yen	59.89	59.88	60.53	59.66

RBI reference rate

## Indian markets

- Indian equity benchmark indices ended flat on Thursday, as gains in banking and metal stocks were offset by the geopolitical uncertainty and caution ahead of the RBI's policy meeting outcome.
- The top gainers were Titan Company, ETERNAL, Cipla, Coal India and Adani Enterprises, rising 1.79-3.67%.
- The top losers were Infosys, Hindalco Industries, SBI Life Insurance Company, Bajaj Finserv and UltraTech Cement, which fell 0.91-1.49%.

## Indian debt

- The interbank call-money rate ended higher at 5.20% on Thursday compared to 4.75% on Wednesday.
- Government bond prices ended higher on Thursday supported by reports of potential tax relief for foreign investors.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 7.00% on Thursday compared to 7.02% on Wednesday.

## Indian Rupee

- The spot rupee ended lower against the US dollar on Thursday on account of importer demand for the dollar, with investors focusing on Reserve Bank of India's monetary policy meet outcome on June 5, 2026.

## Regulatory

- The Pension Fund Regulatory and Development Authority has launched StAR NPS, a digital platform developed by BSE Technologies which enables Points of Presence to digitally onboard subscribers to the National Pension System.

## Economy and Government

- Union Minister Nitin Gadkari said India will pilot hydrogen buses and trucks on 10 roads, with Reliance, Tata and NTPC among partners, marking a key green-mobility test for heavy transport.
- Prime Minister Narendra Modi will visit Gujarat and Daman on Friday to launch projects worth Rs 22,000 crore, providing a sizeable public-capex trigger across regional infrastructure and development schemes.
- West Bengal signed an MoU with Adani Ports, signalling a renewed push to attract private investment into port-led logistics and maritime infrastructure in the state.
- The government is planning to standardize edible-oil pack sizes, a policy step the industry sees as improving consumer transparency and price comparability in a high-volume staples category.
- Tamil Nadu signed an MoU with Larsen & Toubro for three projects worth Rs 18,600 crore, reinforcing the state's large-scale industrial investment pipeline.
- The government plans to use AI-enabled machine-readable standards to reduce industry compliance costs, a move aimed at improving regulatory efficiency and easing business operations.
- The government has formed six sector-specific groups to identify 100 priority products for boosting domestic manufacturing, signalling a targeted industrial-policy push.

## Domestic Debt Market Indicators

Instrument	4 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	4.75%	5.15%	4.85%	7.00%	5.45%
3-Month T-Bill	5.50%	5.55%	5.28%	5.31%	5.40%	5.59%
6-Month T-Bill	5.69%	5.68%	5.44%	5.52%	5.51%	5.59%
1-year T-Bill	5.97%	5.98%	5.63%	5.59%	5.70%	5.61%
3-Month CD	7.23%	7.23%	6.45%	7.10%	7.35%	6.07%
6-Month CD	6.98%	6.98%	7.30%	7.10%	7.30%	6.27%
1-year CD	7.85%	7.85%	7.40%	6.97%	7.25%	6.36%
3-Month CP	8.00%	8.00%	7.00%	7.60%	7.75%	6.39%
6-Month CP	7.35%	7.35%	7.70%	7.60%	7.65%	6.69%
1-year CP	8.27%	8.27%	7.75%	7.40%	7.60%	6.80%
1-year Gilt	5.86%	5.90%	5.97%	5.57%	5.82%	5.64%
3-year Gilt	6.32%	6.40%	6.60%	5.90%	6.43%	5.73%
5-year Gilt	6.81%	6.83%	6.73%	6.35%	6.90%	5.85%
1-year AAA	7.47%	7.52%	7.64%	7.17%	7.57%	6.58%
3-year AAA	7.63%	7.72%	7.69%	7.25%	7.59%	6.62%
5-year AAA	7.69%	7.76%	7.72%	7.32%	7.67%	6.73%
10-year G-sec	7.00%	7.02%	7.02%	6.68%	7.02%	6.21%
Net LAF (Rs Cr)	170645	112336	256669	267460	245161	286076
Forex reserves (\$ bn)	681.38	688.89	698.49	723.61	642.49	692.72

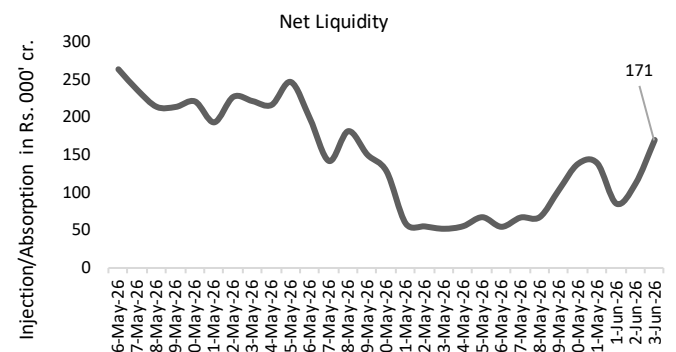
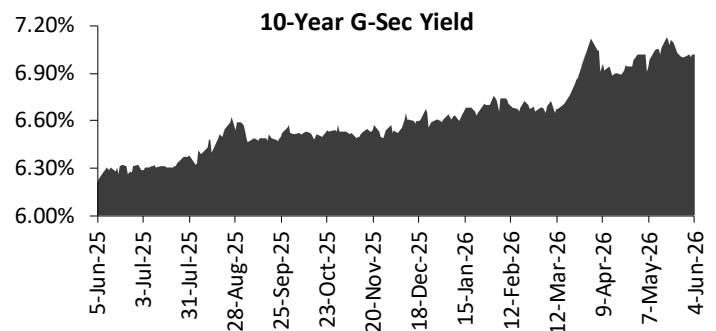
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.69	7.87	8.61	8.66	9.89	10.37
1 Year	6.14	7.95	8.69	8.74	9.97	10.45
3 Year	6.48	7.80	8.54	8.59	9.82	10.30
5 Year	6.81	7.80	8.64	8.69	9.92	10.40
10 Year	7.00	7.79	8.63	8.68	9.91	10.39

Rs. Cr (Debt)	FII Inv 3 June	MF Inv 1 June
Buy	559	13,324
Sell	537	22,432
Net	23	-9,108
Net (MTD)	120	-9,108
Net (YTD)	-2,994	-395,117

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	4.90% (Apr-26)	5.10% (Jan-26)	2.60% (Apr-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

- Viceroy Properties has secured Rs 250 crore in project funding from Bajaj Housing Finance for its luxury residential project, VISAVA, in the Mumbai Metropolitan Region.
- TrueFan AI said it raised \$10 million in a Series A funding round led by Baring Private Equity Partners India and Z3Partners, with participation from IAN Alpha Fund and 3Lines Venture Capital.
- SoftBank affiliate SVF II Lightbulb Cayman sold 5.65 crore Lenskart shares (3.25% stake) for Rs 2,873 crore via a block deal at Rs 508.55/share to investors including Goldman Sachs, Fidelity, Quant Mutual Fund and WhiteOak Capital, reducing SoftBank's holding to 9.88%.
- Air India and Riyadh Air signed a pact to strengthen connectivity between India and Saudi Arabia, supporting passenger-flow growth as aviation ties deepen between the two markets.
- Texmaco, Touax and TrinityRail formed a railcar-leasing venture in India, positioning the partnership to tap rising demand for asset-light freight rolling-stock financing.



Global market indices	4 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51561.93	1.73	5.35	11.27	21.53
Nikkei 225	67470.69	-1.36	13.37	32.13	78.74
FTSE	10360.32	0.27	-0.03	1.81	17.71
Hang Seng	25253.4	-1.48	-3.23	1.88	6.76
Taiwan	45677.46	-1.68	12.22	43.99	111.29

Global debt	4 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.47	4.49	4.45	4.09	4.30	4.37
UK 10-Year (%)	4.89	4.94	4.95	4.44	4.88	4.59
German 10-Year (%)	3.02	3.04	3.08	2.75	3.01	2.52
Japan 10-Year (%)	2.67	2.64	2.50	2.12	2.35	1.51

Domestic	4 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	156086	0.68	5.39	6.37	61.79
Silver (Rs / Kg)	261088	-0.19	8.73	13.45	158.55
Aluminium (Rs / Kg)	393	-1.01	5.93	10.60	62.16
Copper (Rs / kg)	1380	-0.98	7.82	17.82	57.12
Lead (Rs / kg)	211	1.29	3.73	7.18	16.58
Zinc (Rs /Kg)	375	-1.25	8.19	16.25	44.24
Nickel (Rs / kg)	1830	-0.57	-1.49	11.84	36.34

Global	4 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4438.86	-1.16	-4.04	-1.96	32.41
Silver (oz/\$)	7346.00	-2.37	-2.86	4.24	113.05
Brent (\$/bbl)	95.03	-2.84	-16.96	-19.70	46.52
NYMEX crude (\$/bbl)	93.04	-3.10	-12.57	-8.23	48.04

## Global markets

- Wall Street stocks ended mixed on Thursday with DowJones ended higher buoyed by healthcare and financial stocks while Nasdaq declined due to selloffs in technology stocks following dismal earnings reports of major company.
- US 10 year treasury yield ended lower at 4.47% following softer-than-expected labor market data and a pullback in oil prices.
- FTSE index ended higher on Thursday supported by gains in technology stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- US claiming unemployment benefits rose by 13,000 to 225,000 in the last week of May compared to 212,000 in the previous period.
- Eurozone retail sales eased to 1% in April 2026 compared to upwardly revised 2.1% in March 2026.
- Eurozone S&P Global Construction PMI rose to 43.7 in May 2026 compared to 41.7 in April 2026.
- UK S&P Global Construction PMI fell to 38.2 in May 2026 compared to 39.7 in April 2026.

## Commodity

- Crude oil prices fell by \$2.98 to \$93.04 a barrel on the NYMEX after the US signals possible progress in peace deal with Iran.
- Domestic gold prices ended higher buoyed by softer US dollar index.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
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%
June 11	Eurozone PPI, May	6%
June 13	India WPI Inflation, May	8.3%

**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	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	-
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%
	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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