

Domestic Market Performance

Indian market indices	5 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23367	-0.21	-2.77	4.64	-5.59
BSE Sensex	74243	-0.16	-3.60	3.19	-8.84
BSE 100	24848	-0.13	-2.45	6.16	-4.33
BSE 200	10936	-0.09	-1.95	7.68	-2.94
BSE 500	35142	-0.10	-1.59	9.20	-2.34
BSE SmallCap	53343	-0.06	1.88	23.43	0.25
BSE MidCap	46324	0.00	-0.19	14.28	1.41
BSE LargeCap	9213	-0.11	-2.22	6.76	-3.50
Sectoral indices					
BSE IT	28221	-0.83	-0.15	1.06	-23.07
BSE Oil & Gas	26556	-0.43	-3.79	3.90	-1.19
BSE FMCG	17927	0.20	-6.10	6.87	-12.28
BSE Auto	57633	0.02	-0.16	9.54	10.18
BSE Bankex	61479	0.39	0.08	8.66	-2.06
BSE Teck	14908	-0.88	2.33	1.22	-16.66
BSE Capital Goods	80011	-0.18	2.05	24.54	12.68
BSE Consumer Durable	58654	0.45	-0.45	11.47	1.74

Turnover (Rs Cr)	5 June	4 June
BSE Cash	9914	9460
NSE Cash	128871	128984
NSE F&O	18925920	8544029

Rs. Cr (Equity)	FII Inv 4 June	MF Inv 1 June	DII Inv 5 June
Buy	14,368	11,813	22,779
Sell	18,443	8,323	13,646
Net	-4,075	3,490	9,134
Net (MTD)	-20,977	3,490	33,933
Net (YTD)	-265,595	248,712	410,718

	5 June	1Day	Month ago	Year ago
USD	95.40	95.74	95.36	85.77
GBP	128.11	128.60	129.00	116.27
Euro	110.83	111.19	111.44	97.89
100 Yen	59.64	59.89	60.64	59.93

RBI reference rate

Indian markets

- Indian equity benchmark indices ended marginally lower on Friday, dragged down by profit-booking following the RBI Monetary Policy Committee's policy decision, as a downward revision in growth forecasts and a cautious inflation outlook weighed on sentiment.
- The top losers were Wipro, Hindalco Industries, Trent, TCS and Coal India—down 1.99-3.07%.
- The top gainers were Adani Enterprises Limited, Hindustan Unilever Limited, Adani Ports and Special Economic Zone Ltd, Bajaj Finance and Axis Bank—up 1.60-2.36%.

Indian debt

- The interbank call-money rate ended higher at 5.35% on Friday compared to 5.20% on Thursday.
- Government bond prices ended higher on Friday after the central bank kept interest rates unchanged and announced measures to attract foreign capital into local debt and equities.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.98% on Friday compared to 6.99% on Thursday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Friday after the Reserve Bank of India held rates and announced measures aimed at attracting dollar inflows.

Regulatory

- RBI expanded the universe of Fully Accessible Route (FAR) securities by including all new issuances of 15-, 30- and 40-year government securities, and removed limits on short-term investment, concentration, and individual securities under the General Route for FPIs enhancing depth and liquidity of the long-end bond market.
- The Reserve Bank of India (RBI) said it is fully prepared to deal with cyber security threats linked to the Mythos platform and has already issued required advisories to regulated entities.
- The Reserve Bank of India (RBI) eased investment norms for non-resident Indians (NRIs), Overseas Citizens of India (OCIs), and other overseas individuals, allowing them to take larger positions in listed companies without registering with the Securities and Exchange Board of India (Sebi).

Economy and Government

- The Reserve Bank of India (RBI)'s Monetary Policy Committee (MPC) voted unanimously to keep the repo rate unchanged at 5.25%.
- Accordingly, the standing deposit facility rate remains at 5.00%, while the marginal standing facility rate and bank rate are unchanged at 5.50%.
- The MPC decided to maintain its "neutral" stance, reflecting a calibrated approach amid rising global uncertainties, elevated energy prices and supply chain disruptions.
- The committee emphasised data-dependence and flexibility, choosing to wait for greater clarity on inflation risks and growth trade-off, before changing policy direction.
- The RBI has projected India's real gross domestic product (GDP) growth for fiscal 2027 at 6.6%.
- The RBI has projected Consumer Price Index-based inflation for fiscal 2027 at 5.1% and core inflation at 4.7%.

Domestic Debt Market Indicators

Instrument	5 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.20%	4.75%	4.85%	7.00%	5.55%
3-Month T-Bill	5.40%	5.50%	5.29%	5.30%	5.40%	5.55%
6-Month T-Bill	5.65%	5.69%	5.44%	5.51%	5.51%	5.55%
1-year T-Bill	5.93%	5.97%	5.63%	5.58%	5.70%	5.56%
3-Month CD	7.10%	7.23%	6.50%	7.15%	7.35%	6.07%
6-Month CD	7.50%	7.65%	6.95%	7.05%	7.30%	6.29%
1-year CD	7.70%	7.85%	7.35%	6.95%	7.25%	6.32%
3-Month CP	7.75%	8.00%	7.10%	7.60%	7.75%	6.36%
6-Month CP	7.85%	8.10%	7.35%	7.55%	7.65%	6.65%
1-year CP	8.05%	8.27%	7.70%	7.40%	7.60%	6.84%
1-year Gilt	6.01%	6.14%	5.93%	5.60%	5.82%	5.60%
3-year Gilt	6.35%	6.48%	6.46%	5.91%	6.43%	5.71%
5-year Gilt	6.65%	6.81%	6.74%	6.32%	6.90%	5.84%
1-year AAA	7.77%	7.95%	7.49%	7.12%	7.57%	6.58%
3-year AAA	7.63%	7.80%	7.70%	7.20%	7.59%	6.62%
5-year AAA	7.69%	7.80%	7.72%	7.27%	7.67%	6.73%
10-year G-sec	6.98%	7.00%	7.02%	6.65%	7.02%	6.20%
Net LAF (Rs Cr)	188770	170645	280281	302440	245161	303363
Forex reserves (\$ bn)	682.32	681.38	698.49	723.61	642.49	692.72

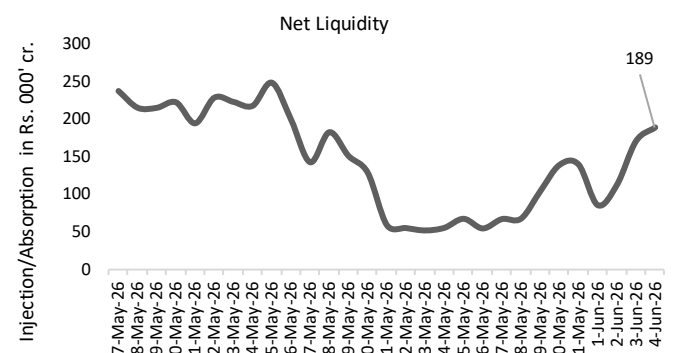
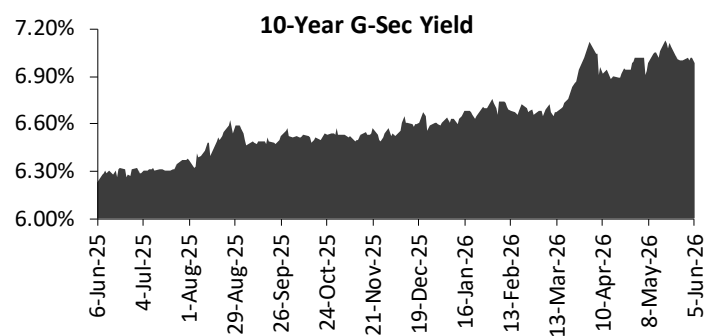
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.65	7.72	8.46	8.51	9.74	10.22
1 Year	6.01	7.77	8.51	8.56	9.79	10.27
3 Year	6.35	7.63	8.37	8.42	9.65	10.13
5 Year	6.65	7.69	8.53	8.58	9.81	10.29
10 Year	6.98	7.70	8.54	8.59	9.82	10.30

Rs. Cr (Debt)	FII Inv 4 June	MF Inv 1 June
Buy	649	13,324
Sell	391	22,432
Net	258	-9,108
Net (MTD)	377	-9,108
Net (YTD)	-2,736	-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	7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY26)
India Manufacturing PMI	55.0 (May-26)	54.7 (Apr-26)	58.3 (May-25)
India Service PMI	59.8 (May-26)	58.8 (Apr-26)	61.2 (May-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

- Arnya Realestates Fund Advisors invested Rs 1,000 crore across residential projects in India through its maiden debt fund and direct investments.
- Creative Newtech has received an advance work order from BSNL for the BharatNet Middle Mile Network Project in the Odisha Telecom Circle, with a total project value of approximately Rs 3,194.83 crore.
- EMS received the lowest bidder (L-1) status awarded by UP Jal Nigam (Urban), Varanasi for construction worth Rs 102.8 cr
- Maruti Suzuki India Ltd plans to invest Rs 925 crore by FY 2030-31 towards green energy initiatives, including two biogas projects.
- Paras Healthcare Ltd, filed preliminary papers with capital markets regulator Sebi to raise up to Rs 1,800 crore through an initial public offering (IPO).



Global market indices	5 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50866.78	-1.35	3.18	9.77	20.20
Nikkei 225	66588.12	-1.31	11.89	30.40	77.31
FTSE	10368.05	0.07	1.46	1.88	17.67
Hang Seng	24961.95	-1.15	-3.62	0.70	4.41
Taiwan	45070.94	-1.33	10.55	42.08	107.95

Global debt	5 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.55	4.47	4.43	4.13	4.30	4.40
UK 10-Year (%)	4.88	4.89	5.06	4.55	4.88	4.59
German 10-Year (%)	3.04	3.02	3.07	2.85	3.01	2.59
Japan 10-Year (%)	2.67	2.67	2.50	2.15	2.35	1.47

Domestic	5 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	154238	-1.18	4.47	5.11	57.12
Silver (Rs / Kg)	256908	-1.60	6.84	11.63	145.43
Aluminium (Rs / Kg)	387	-1.60	3.87	8.82	60.59
Copper (Rs / kg)	1388	0.61	9.41	18.53	57.00
Lead (Rs / kg)	209	-1.25	0.80	5.83	14.96
Zinc (Rs /Kg)	372	-0.92	6.84	15.18	43.61
Nickel (Rs / kg)	1809	-1.15	-3.26	10.55	34.71

Global	5 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4477.26	0.87	-1.03	-1.12	32.66
Silver (oz/\$)	7376.00	0.41	1.01	4.67	113.74
Brent (\$/bbl)	93.09	-2.04	-15.27	-21.34	42.47
NYMEX crude (\$/bbl)	90.54	-2.69	-11.47	-10.69	42.88

Global markets

- Wall Street stocks closed lower on Friday, dragged down by a sell-off in technology and chip stocks as upbeat jobs report for May month, fueling Fed rate hike expectations.
- 10-year US bond yield ended higher at 4.55% as upbeat jobs data for May month shifted market focus back toward potential interest rate hikes
- FTSE index closed marginally higher on Friday, as signs of softer inflation pressures eased rate hike concerns, along with gains in defensive stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- Data from the US Labor Department showed that non-farm payroll employment in US grew by 172,000 jobs in May after growing by an upwardly revised 179,000 jobs in April (115,000 jobs originally reported).
- US unemployment rate remained at 4.3% in May 2026, unchanged from the previous month.
- The Eurozone economy expanded 0.3% in Q1 2026 compared to 1.2% growth in Q4 2025.
- UK Halifax House Price Index rose 0.5% year-on-year in May 2026, compared to a 0.4% gain in April 2026.
- The Japanese economy expanded at an annualized rate of 1.8% in Q1 2026, compared to a downwardly revised 0.7% increase in Q4 2025.
- Japan bank lending rose 5.7% year-on-year in May 2026, compared to a 5.4% gain in April 2026.
- Japan coincident economic index rose to 117.9 in April 2026 compared to an upwardly revised 116.8 in March 2026 while the leading economic index edged up to 115.9 in from an upwardly revised 115.4.

Commodity

- Crude oil prices fell by \$2.50 to \$90.54 a barrel on the NYMEX as reduced fears of an escalation in the US-Iran conflict eased supply concerns.
- Domestic gold prices declined on Friday due to a stronger dollar index.

Forthcoming results

Date	Indicator	Previous
NA	NA	NA

Upcoming market indicators

Date	Indicator	Previous
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 12	UK GDP, Apr	1.2%
June 15	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 -MEX, 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	-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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