

Daily Market Monitor

June 09, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	8 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23123	-1.04	-4.36	3.54	-7.52
BSE Sensex	73524	-0.97	-4.92	2.19	-10.54
BSE 100	24574	-1.10	-4.37	4.99	-6.34
BSE 200	10800	-1.25	-4.21	6.34	-5.12
BSE 500	34674	-1.33	-4.18	7.74	-4.58
BSE SmallCap	52373	-1.82	-3.16	21.18	-2.00
BSE MidCap	45527	-1.72	-4.19	12.31	-1.24
BSE LargeCap	9105	-1.17	-4.17	5.51	-5.61
Sectoral indices					
BSE IT	27857	-1.29	-2.55	-0.25	-24.38
BSE Oil & Gas	26157	-1.50	-4.58	2.34	-3.41
BSE FMCG	17851	-0.42	-6.04	6.42	-12.81
BSE Auto	56567	-1.85	-5.66	7.51	6.54
BSE Bankex	60939	-0.88	-2.27	7.70	-4.12
BSE Teck	14801	-0.72	-0.91	0.50	-17.50
BSE Capital Goods	78425	-1.98	-2.12	22.07	10.77
BSE Consumer Durable	57831	-1.40	-4.50	9.91	-0.97

Turnover (Rs Cr)	8 June	5 June
BSE Cash	9055	9914
NSE Cash	109230	128871
NSE F&O	21487222	18925920

Rs. Cr (Equity)	FII Inv 5 June	MF Inv 4 June	DII Inv 8 June
Buy	11,767	12,904	16,683
Sell	20,086	10,118	11,518
Net	-8,319	2,786	5,165
Net (MTD)	-29,296	20,556	39,098
Net (YTD)	-273,914	265,777	415,883

	8 June	1Day	Month ago	Year ago
USD	95.62	95.40	94.44	85.79
GBP	127.41	128.11	128.31	116.25
Euro	110.14	110.83	110.92	98.11
100 Yen	59.66	59.64	60.24	59.55

RBI reference rate

Indian markets

- Indian equity benchmark indices closed lower on Monday, pressured by rising crude oil prices due to fresh tensions in the Middle East and continued foreign fund outflows.
- The top losers were Wipro, Jio Financial Services, Eternal, Hindalco Industries and Shriram Finance—down 3.14%-8.45%.
- The top gainers were Max Healthcare Institute, Power Grid Corporation of India, Bharti Airtel, Bharat Electronics and Nestle India—up 0.99%-2.95%.

Indian debt

- The interbank call-money rate ended lower at 5.25% on Monday compared to 5.35% on Friday.
- Government bond prices ended higher on Monday after the Reserve Bank of India left its key policy rate unchanged and unveiled a series of measures to attract foreign investment. However, higher crude oil prices and elevated US Treasury yields capped the gains.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.96% on Monday compared to 6.98% on Friday.

Indian Rupee

- The spot rupee ended lower against the US dollar on Monday as rising crude oil prices, global uncertainties and expectations of a US rate hike weighed on the currency.

Regulatory

- The Reserve Bank of India (RBI) announced premature redemption for SGB 2021-22 Series-III from June 8, 2026, with strong returns of around 220%, highlighting the scheme's attractiveness as a gold-linked investment.
- SEBI Chairperson Tuhin Kanta Pandey has emphasized that the regulator's comprehensive review of broker and IPO regulations marks the next phase of market reforms, aimed at enhancing transparency, strengthening compliance, and improving investor protection in India's capital markets.
- SEBI chief Tuhin Kanta Pandey stated that capital markets are increasingly becoming a key avenue for channeling household savings in India, reflecting growing investor participation and the deepening of financial markets.

Economy and Government

- According to the Reserve Bank of India, India reported a current account surplus of \$7.1 billion (0.7% of GDP) in the January–March quarter of FY2025–26, however, for the full fiscal year, the current account deficit widened to \$25.2 billion (0.6% of GDP), compared to \$22.9 billion in FY2024–25.
- Finance Minister announced that over 58 crore Jan Dhan accounts have integrated millions into formal banking, enabling direct benefit transfers, boosting women's financial inclusion, and supporting poverty reduction with 94% adult banking coverage.
- Union Minister G Kishan Reddy said the Centre has sufficient coal reserves to meet power generation needs for 80 days, while also advancing overseas critical mineral exploration in Argentina to strengthen future resource security.
- Petroleum Minister Hardeep Singh Puri said India can withstand a disruption in Strait of Hormuz oil supplies for about a month, supported by around 76 days of fuel reserves and diversified sourcing, with limited long-term impact on crude prices.

Domestic Debt Market Indicators

Instrument	8 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.25%	5.35%	5.20%	5.15%	7.00%	5.00%
3-Month T-Bill	5.36%	5.40%	5.29%	5.31%	5.40%	5.36%
6-Month T-Bill	5.65%	5.65%	5.50%	5.51%	5.51%	5.40%
1-year T-Bill	5.92%	5.93%	5.63%	5.60%	5.70%	5.40%
3-Month CD	7.03%	7.10%	6.60%	7.10%	7.35%	5.74%
6-Month CD	7.43%	7.50%	6.97%	7.05%	7.30%	6.01%
1-year CD	7.70%	7.70%	7.35%	6.94%	7.25%	6.17%
3-Month CP	7.70%	7.75%	7.13%	7.60%	7.75%	6.05%
6-Month CP	7.85%	7.85%	7.45%	7.55%	7.65%	6.30%
1-year CP	8.05%	8.05%	7.77%	7.27%	7.60%	6.56%
1-year Gilt	6.00%	6.01%	5.78%	5.65%	5.82%	5.44%
3-year Gilt	6.33%	6.35%	6.31%	6.00%	6.43%	5.66%
5-year Gilt	6.60%	6.65%	6.68%	6.34%	6.90%	5.81%
1-year AAA	7.63%	7.77%	7.45%	7.13%	7.57%	6.43%
3-year AAA	7.54%	7.63%	7.60%	7.23%	7.59%	6.50%
5-year AAA	7.56%	7.69%	7.66%	7.28%	7.67%	6.61%
10-year G-sec	6.96%	6.98%	6.98%	6.69%	7.02%	6.23%
Net LAF (Rs Cr)	166139	159398	214939	290993	245161	313097
Forex reserves (\$ bn)	682.32	681.38	690.69	728.49	642.49	691.49

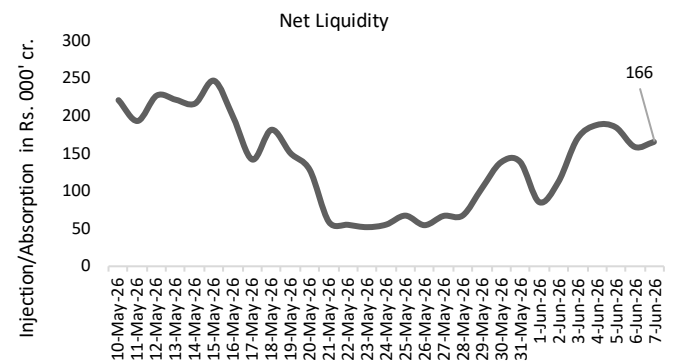
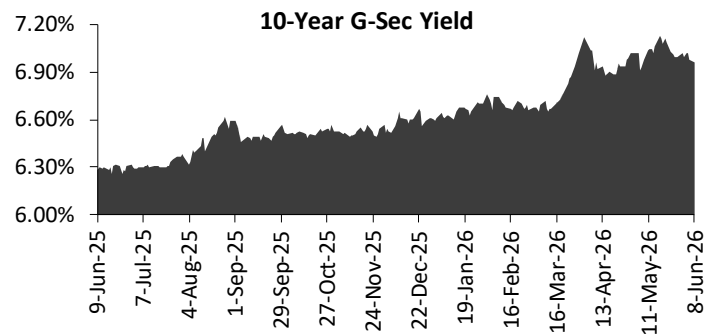
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.65	7.68	8.42	8.47	9.70	10.18
1 Year	6.00	7.63	8.37	8.42	9.65	10.13
3 Year	6.33	7.54	8.28	8.33	9.56	10.04
5 Year	6.60	7.56	8.40	8.45	9.68	10.16
10 Year	6.96	7.66	8.50	8.55	9.78	10.26

Rs. Cr (Debt)	FII Inv 5 June	MF Inv 4 June
Buy	2,407	27,676
Sell	429	30,038
Net	1,978	-2,362
Net (MTD)	2,355	-22,995
Net (YTD)	-758	-409,004

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

- Haleon plans to invest Rs 2,000 crore to set up its first India manufacturing plant in Pithampur, boosting local and export production of oral care products and strengthening its presence in India's fast-growing consumer healthcare market.
- DEE Development Engineers secured a Rs 387 crore contract from BPCL, boosting its order book beyond Rs 2,400 crore and providing strong long-term revenue visibility through 2028.
- Grasim Industries announced an investment of Rs 3,094 crore for the Phase II expansion of its Lyocell capacity by 110 KTPA at Harihar, Karnataka.
- Avani Infratech plans to invest around Rs 750 crore over the next five years to develop three projects in Gurugram and Sonipat, Haryana, as part of its expansion strategy.
- Sigma Advanced Systems has secured an export contract worth Rs 208 crore (\$21.97 million) to manufacture and supply 40,000 units of 155 mm M107 artillery shell bodies to a North American.
- Carlyle is acquiring Italy's BioForLife for Rs 188 crore.
- Rail Vikas Nigam received a Letter of Acceptance for an EPC order worth Rs 221.33 crore from South East Central Railway.



Global market indices	8 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50786.01	-0.16	2.37	9.59	18.76
Nikkei 225	64024.6	-3.85	2.09	25.38	69.64
FTSE	10373.2	0.05	1.37	1.93	17.37
Hang Seng	24657.06	-1.22	-6.58	-0.53	3.63
Taiwan	43502.78	-3.48	4.56	37.13	100.84

Global debt	8 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.56	4.55	4.38	4.15	4.30	4.51
UK 10-Year (%)	4.95	4.88	4.92	4.63	4.88	4.64
German 10-Year (%)	3.06	3.04	3.00	2.86	3.01	2.56
Japan 10-Year (%)	2.72	2.67	2.48	2.16	2.35	1.48

Domestic	8 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	151489	-1.78	0.27	3.24	55.94
Silver (Rs / Kg)	244300	-4.91	-4.42	6.16	132.04
Aluminium (Rs / Kg)	386	-0.28	3.98	8.51	60.20
Copper (Rs / kg)	1340	-3.44	1.72	14.46	52.75
Lead (Rs / kg)	209	0.38	2.67	6.24	14.45
Zinc (Rs /Kg)	367	-1.29	4.66	13.69	42.94
Nickel (Rs / kg)	1806	-0.19	-1.60	10.33	34.62

Global	8 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4335.63	-3.16	-7.74	-4.24	29.27
Silver (oz/\$)	6786.00	-8.00	-14.82	-3.70	90.30
Brent (\$/bbl)	94.25	1.25	-6.95	-20.36	41.79
NYMEX crude (\$/bbl)	91.30	0.84	-4.32	-9.94	41.38

Global markets

- Wall Street stocks ended mixed on Monday as Nasdaq gained on strength in technology and chip stocks, while the Dow Jones ended lower due to weakness in industrial and financial sectors.
- 10-year US bond yield ended higher marginally at 4.56% with investors assessing impact of renewed Middle East tensions.
- FTSE index closed marginally higher on Monday as losses driven by geopolitical uncertainty were capped by a late recovery in energy and defensive stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- US Consumer Inflation Expectations decreased to 3.5% in May 2026 compared to 3.6% in April 2026.
- China's trade surplus narrowed to \$84.82 billion in April 2026 from \$95.85 billion a year earlier, as exports surged 14.1% to a record \$359.44 billion on stockpiling amid geopolitical concerns, while imports jumped 25.3% to \$274.62 billion, marking a second consecutive monthly record despite slightly easing from March's pace.
- Japan Eco Watchers Survey Current rose to 43.6 in May 2026 compared to 40.8 in April 2026.
- Japan Economy Watchers Survey Outlook increased to 40.7 in May compared to 39.4 in April 2026.

Commodity

- Crude oil prices rose by 76 cents to \$91.30 a barrel on the NYMEX as escalating Middle East tensions and renewed strikes between Iran and Israel, raised supply concerns.
- Domestic gold prices ended lower due to strong dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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%
June 11	Eurozone PPI, May	6%

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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