

Daily Market Monitor

June 10, 2026

Domestic Market Performance

Indian market indices	9 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23242	0.52	-3.86	4.08	-7.41
BSE Sensex	73919	0.54	-4.41	2.74	-10.34
BSE 100	24746	0.70	-3.70	5.72	-6.22
BSE 200	10887	0.81	-3.43	7.20	-4.95
BSE 500	34979	0.88	-3.34	8.69	-4.42
BSE SmallCap	53204	1.59	-1.62	23.11	-1.61
BSE MidCap	46140	1.35	-2.89	13.82	-0.92
BSE LargeCap	9170	0.71	-3.49	6.26	-5.48
Sectoral indices					
BSE IT	27788	-0.25	-2.79	-0.50	-25.33
BSE Oil & Gas	26221	0.24	-4.35	2.59	-4.24
BSE FMCG	17985	0.75	-5.33	7.22	-12.51
BSE Auto	57325	1.34	-4.40	8.95	7.45
BSE Bankex	62265	2.18	-0.14	10.05	-2.70
BSE Teck	14713	-0.60	-1.50	-0.10	-18.47
BSE Capital Goods	79227	1.02	-1.12	23.32	11.09
BSE Consumer Durable	57985	0.27	-4.24	10.20	-0.77

Turnover (Rs Cr)	9 June	8 June
BSE Cash	8183	9055
NSE Cash	123203	109230
NSE F&O	62942818	21487222

Rs. Cr (Equity)	FII Inv 8 June	MF Inv 5 June	DII Inv 9 June
Buy	9,028	18,989	17,665
Sell	14,166	11,036	11,506
Net	-5,139	7,952	6,159
Net (MTD)	-34,435	28,508	45,258
Net (YTD)	-279,053	273,730	422,042

	9 June	1Day	Month ago	Year ago
USD	95.64	95.62	94.44	85.50
GBP	127.89	127.41	128.31	115.93
Euro	110.47	110.14	110.92	97.66
100 Yen	59.74	59.66	60.24	59.24

RBI reference rate

Indian markets

- Indian equity benchmark indices closed in the positive territory on Tuesday, driven by gains in banking and IT stocks and supportive global market cues.
- The top gainers were InterGlobe Aviation Ltd, Jio Financial, SBI, Axis Bank and ICICI Bank—up 2.06-3.95%.
- The top losers were Titan, ONGC, NTPC, Power Grid Corporation and Eternal Ltd—down 1.15-2.20%.

Indian debt

- The interbank call-money rate ended higher at 5.27% on Tuesday compared to 5.25% on Monday.
- Government bond prices ended higher on Tuesday supported by softer oil prices and continued support from RBI measures to boost foreign inflows.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.91% on Tuesday compared to 6.96% on Monday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Tuesday, buoyed by easing crude oil prices and the measures announced by the Monetary Policy Committee of the Reserve Bank of India.

Economy and Government

- Fitch Ratings cut India's FY27 GDP growth forecast to 6.4%, citing global uncertainties and geopolitical tensions like a potential US-Iran conflict that could impact trade and energy prices.
- The Centre announced an interim allocation of Rs 95,692 crore under the newly introduced VB-G RAM G scheme for a seamless transition.
- Union minister Jitendra Singh announced that a proposal to construct a new two-lane parallel tube tunnel along the Chenani-Nashri stretch, connecting Udhampur with Ramban district, has been approved, boosting infrastructure connectivity.
- Defence Minister Rajnath Singh has approved the establishment of a 250 MW solar power project on about 850 acres of defence land in Sitapur, Uttar Pradesh, supporting renewable energy capacity and efficient utilization of vacant land.
- The government introduced new rules for coal exchanges to boost transparency, efficiency, and market-driven pricing in the energy sector.
- UP CM Yogi Adityanath launched Project Ganga, emphasizing self-reliance and long-term development over "freebie-driven" policies.
- The Ministry of New and Renewable Energy (MNRE) has relaxed ALMM (Approved List of Models and Manufacturers) rules for rooftop solar projects, simplifying module approvals to boost faster adoption in residential and small commercial segments.
- The Chhattisgarh cabinet approved an IPO for its power utility to raise funds and boost efficiency, while also greenlighting a 15,000-acre crop diversification scheme to promote sustainable and high-value farming.

Domestic Debt Market Indicators

Instrument	9 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.27%	5.25%	5.20%	5.07%	7.00%	4.90%
3-Month T-Bill	5.32%	5.36%	5.29%	5.35%	5.40%	5.33%
6-Month T-Bill	5.58%	5.65%	5.50%	5.54%	5.51%	5.35%
1-year T-Bill	5.92%	5.92%	5.63%	5.63%	5.70%	5.40%
3-Month CD	6.85%	7.03%	6.60%	7.22%	7.35%	5.72%
6-Month CD	7.30%	7.43%	6.97%	7.20%	7.30%	6.00%
1-year CD	7.50%	7.70%	7.35%	6.98%	7.25%	6.15%
3-Month CP	7.50%	7.70%	7.13%	7.70%	7.75%	6.15%
6-Month CP	7.65%	7.85%	7.45%	7.60%	7.65%	6.39%
1-year CP	7.90%	8.05%	7.77%	7.30%	7.60%	6.52%
1-year Gilt	6.00%	6.00%	5.78%	5.66%	5.82%	5.49%
3-year Gilt	6.27%	6.33%	6.31%	6.13%	6.43%	5.70%
5-year Gilt	6.51%	6.60%	6.68%	6.44%	6.90%	5.88%
1-year AAA	7.48%	7.63%	7.45%	7.23%	7.57%	6.43%
3-year AAA	7.42%	7.54%	7.60%	7.28%	7.59%	6.50%
5-year AAA	7.49%	7.56%	7.66%	7.35%	7.67%	6.64%
10-year G-sec	6.90%	6.96%	6.98%	6.72%	7.02%	6.28%
Net LAF (Rs Cr)	133691	166139	214939	219107	245161	244699
Forex reserves (\$ bn)	682.32	681.38	690.69	728.49	642.49	691.49

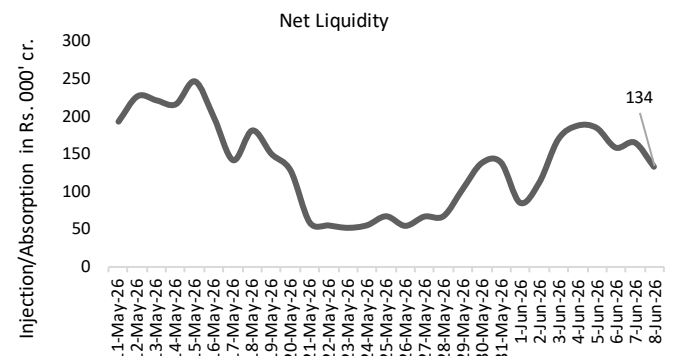
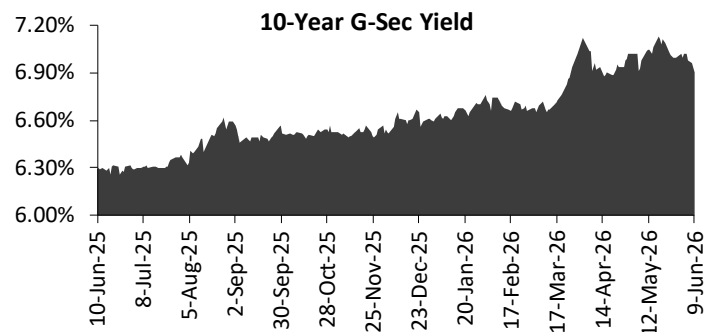
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.58	7.52	8.26	8.31	9.54	10.02
1 Year	6.00	7.48	8.22	8.27	9.50	9.98
3 Year	6.27	7.42	8.16	8.21	9.44	9.92
5 Year	6.51	7.49	8.33	8.38	9.61	10.09
10 Year	6.90	7.61	8.45	8.50	9.73	10.21

Rs. Cr (Debt)	FII Inv 8 June	MF Inv 5 June
Buy	450	19,472
Sell	316	25,323
Net	134	-5,851
Net (MTD)	2,489	-28,846
Net (YTD)	-624	-414,855

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 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

- NTPC plans to float an EPC tender worth over Rs 10,000 crore for key units of the Mahi Banswara Nuclear Power Project in Rajasthan, indicating a significant boost in nuclear infrastructure investment and EPC opportunities.
- Afcons Infrastructure has received a Rs 5,301 crore contract from Vadhvan Port Project Ltd to construct a 10.14 km breakwater in Maharashtra, enhancing its order book and strengthening its position in large-scale marine infrastructure projects.
- Adani Energy Solutions is acquiring IntelliSmart Infrastructure for Rs 3,050 crore, strengthening its position in smart metering and becoming one of India's largest platforms in the segment.
- NTPC Renewable Energy Ltd plans to develop a 250 MW solar project with battery storage (BESS) in Sitapur, Uttar Pradesh, strengthening its renewable portfolio and supporting integrated clean energy infrastructure.
- Rail Vikas Nigam Limited (RVNL) secured a Rs 221.33 crore railway contract, boosting its order book.
- Marsons secured a Rs 9.48 crore order from a West Bengal utility, supporting its growth in the power equipment segment.



Global market indices	9 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50872.11	0.17	2.55	9.78	18.97
Nikkei 225	65416.63	2.17	4.31	28.11	71.75
FTSE	10227.33	-1.41	-0.06	0.50	15.79
Hang Seng	24565.9	-0.37	-6.93	-0.90	1.59
Taiwan	44704.44	2.76	7.45	40.92	105.16

Global debt	9 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.53	4.56	4.38	4.12	4.30	4.49
UK 10-Year (%)	4.92	4.95	4.92	4.67	4.88	4.62
German 10-Year (%)	3.06	3.06	3.00	2.86	3.01	2.57
Japan 10-Year (%)	2.68	2.72	2.48	2.19	2.35	1.46

Domestic	9 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	152519	0.68	0.95	3.94	59.10
Silver (Rs / Kg)	245938	0.67	-3.78	6.87	132.98
Aluminium (Rs / Kg)	386	0.19	4.18	8.72	61.08
Copper (Rs / kg)	1360	1.44	3.19	16.11	53.96
Lead (Rs / kg)	208	-0.84	1.81	5.35	13.65
Zinc (Rs /Kg)	373	1.55	6.29	15.46	45.73
Nickel (Rs / kg)	1793	-0.69	-2.27	9.57	33.47

Global	9 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4339.56	0.09	-7.66	-4.16	31.02
Silver (oz/\$)	6844.00	0.85	-14.10	-2.88	90.22
Brent (\$/bbl)	91.45	-2.97	-9.71	-22.73	36.41
NYMEX crude (\$/bbl)	88.20	-3.40	-7.57	-13.00	35.09

Global markets

- Wall Street stocks closed mixed on Tuesday with Dow Jones gaining on strength in defensive and cyclical stocks while Nasdaq declined due to profit taking in technology stocks following recent rally..
- 10-year US bond yield ended lower at 4.55% as investors remained caution ahead of release of key economic data
- FTSE index closed lower on Tuesday dragged down by weakness in energy stocks amid declining oil prices.
- Asian markets were trading mostly lower at 8.30 AM.
- The US trade deficit narrowed to \$55.9 billion in April 2026 from a revised \$56.6 billion in March, as exports rose 2.6% to a record \$327.1 billion, while imports increased 2.0% to \$383.0 billion.
- US NFIB Small Business Optimism Index decreased to 95.3 in May 2026 compared to 95.9 in April 2026.
- China annual inflation was steady at 1.2% in May 2026, unchanged compared to April 2026.
- China producer prices increased 3.9% in May 2026, compared to a 2.8% rise in April 2026.
- Japan producer prices rose 6.3% in May 2026, accelerating from an upwardly revised 5.3% increase (4.9% growth previously) in April 2026.
- Japan machine tool orders grew by 37.4% year-on-year to JPY 176,883 million in May 2026, compared to 45.1% in April 2026..

Commodity

- Crude oil prices fell by \$3.10 to \$88.20 a barrel on the NYMEX as a halt in Iran-Israel attacks eased fears of supply disruptions.
- Domestic gold prices ended higher due to weakness in the dollar index.

Forthcoming results

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Upcoming market indicators

Date	Indicator	Previous
June 11	Eurozone PPI, May	6%
June 12	UK GDP, Apr	1.2%
June 15	India WPI Inflation, May	8.3%
June 16	India Balance of Trade, May	\$.-28.38B
June 17	UK Inflation Rate, May	2.8%

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	Jul-25	Jun-25
Debt Indicators	Currency in circulation (Rs billion)	42826.4	42288.66	41320	40445	39800	39079	38551	38184	38071	38097	38147	38372
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	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%	6.38%	6.32%
	Call rate	5.55%	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.)	689.49	700	703	724	696	692	688	699	701	693	698	699

	GDP	NA	NA	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	3623.03	NA	2712.42	1255.65	-1208.29	1515.27	NA	NA	2712.42	1255.65	-1208.29
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	8.00%	7.20%	NA	4.10%	5.20%	4.80%	8.00%
	Exports, \$ billion	NA	43.56	38.92	36.61	36.56	38.51	38.13	NA	38.92	36.61	36.56	38.51
	Imports, \$ billion	NA	71.94	59.59	63.71	71.24	63.55	62.66	NA	59.59	63.71	71.24	63.55
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55	56.6	54.7	53.90	56.9	55.4	55
	Services PMI	59.80	58.80	57.5	58.1	58.5	58	59.8	58.8	57.5	58.1	58.5	58
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	174550	170276	242,702	200064	183609	193384	174550
	India crude oil import (mbpd)	NA	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	26.30%	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	
	Auto – Two-wheelers	NA	28.40%	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	
	Auto – Commercial vehicles	NA	15.00%	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	
	Auto – Tractors	NA	26.80%	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	
	Infra – Coal	NA	-8.70%	-4%	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-	12.30%	-6.80%
	Infra – Electricity	NA	4.10%	-0.50%	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%	
	Infra – Steel	NA	6.20%	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%	
	Infra – Cement	NA	9.40%	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%	

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