

Daily Market Monitor

June 11, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	10 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23215	-0.12	-3.98	3.96	-7.53
BSE Sensex	73983	0.09	-4.33	2.83	-10.21
BSE 100	24674	-0.29	-3.98	5.41	-6.52
BSE 200	10833	-0.50	-3.91	6.66	-5.43
BSE 500	34767	-0.61	-3.93	8.03	-5.03
BSE SmallCap	52538	-1.25	-2.85	21.57	-3.16
BSE MidCap	45507	-1.37	-4.23	12.26	-2.32
BSE LargeCap	9138	-0.35	-3.83	5.89	-5.82
Sectoral indices					
BSE IT	27552	-0.85	-3.61	-1.34	-27.11
BSE Oil & Gas	25757	-1.77	-6.04	0.77	-6.00
BSE FMCG	18136	0.84	-4.54	8.12	-12.08
BSE Auto	56853	-0.82	-5.19	8.06	6.65
BSE Bankex	62059	-0.33	-0.47	9.68	-2.90
BSE Teck	14561	-1.03	-2.52	-1.13	-20.01
BSE Capital Goods	78091	-1.43	-2.54	21.56	9.27
BSE Consumer Durable	57503	-0.83	-5.04	9.28	-2.02

Turnover (Rs Cr)	10 June	9 June
BSE Cash	8413	8183
NSE Cash	119714	123203
NSE F&O	8180296	62942818

Rs. Cr (Equity)	FII Inv 9 June	MF Inv 8 June	DII Inv 10 June
Buy	15,510	11,768	17,396
Sell	19,396	9,602	14,272
Net	-3,886	2,165	3,124
Net (MTD)	-38,320	30,674	48,382
Net (YTD)	-282,938	275,895	425,166

	10 June	1Day	Month ago	Year ago
USD	95.19	95.64	94.44	85.59
GBP	127.46	127.89	128.31	115.62
Euro	109.96	110.47	110.92	97.61
100 Yen	59.35	59.74	60.24	59.24

RBI reference rate

Indian markets

- Indian equity benchmarks closed mixed on Wednesday, with the BSE Sensex gaining from buying in financial and banking stocks and Nifty 50 declining due to profit-booking and uncertainty in global markets.
- The top gainers were Nestle India, Hindustan Unilever, Axis Bank, Kotak Bank and ICICI Bank, up 1.41-1.95%.
- The top losers were Hindalco, Coal India, ONGC, Eternal and SBI Life, down 2.32-3.41%.

Indian debt

- The interbank call-money rate ended lower at 5.20% on Wednesday compared to 5.27% on Tuesday.
- Government bond prices ended lower on Wednesday pressured by profit-booking at higher level.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.94% on Wednesday compared to 6.91% on Tuesday.

Indian Rupee

- The spot rupee closed higher against the US dollar on Wednesday, supported by reports of a likely central bank intervention.

Regulatory

- The Reserve Bank of India has opened a special window to enhance returns on NRI dollar deposits, making FCNR deposits more attractive and supporting foreign currency inflows into the country.
- The Reserve Bank of India (RBI) consolidated regulatory instructions relating to risk management, compliance and internal audit functions for commercial banks, requiring lenders to establish dedicated control functions headed by a chief risk officer (CRO), chief compliance officer (CCO) and head of internal audit (HIA).
- According to RBI data, India's outward FDI commitments fell 49.02% month-on-month to \$4.49 billion in May 2026, primarily due to a decline in equity investments, loans, and guarantees by Indian companies.
- SEBI proposed consolidated disclosure norms for executive pay at AMCs, enhancing transparency and governance in the mutual fund industry.

Economy and Government

- The Union Cabinet has approved two infrastructure projects worth over Rs 2,500 crore in Amaravati, boosting administrative and housing development in the region.
- The Union Cabinet cleared a Rs 2,169 crore Ahmedabad Metro Phase 2A extension to the international airport, enhancing urban connectivity and supporting metro rail infrastructure growth.
- The government has outlined the next phase of pharma sector growth, focusing on innovation, exports, and global competitiveness.
- The government approved 96 firms under the textile PLI scheme with a Rs 12,823 crore outlay, boosting manufacturing and export potential.
- The government has approved the extension of the Credit Guarantee Scheme for Microfinance Institutions - 2.0 and a hike in the maximum loan limit to Rs 1,000 crore.

Domestic Debt Market Indicators

Instrument	10 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	5.27%	5.20%	4.75%	7.00%	5.25%
3-Month T-Bill	5.28%	5.32%	5.29%	5.34%	5.40%	5.36%
6-Month T-Bill	5.55%	5.58%	5.50%	5.52%	5.51%	5.41%
1-year T-Bill	5.88%	5.92%	5.63%	5.60%	5.70%	5.42%
3-Month CD	6.85%	6.85%	6.60%	7.17%	7.35%	5.73%
6-Month CD	7.30%	7.30%	6.97%	7.20%	7.30%	6.06%
1-year CD	7.50%	7.50%	7.35%	6.98%	7.25%	6.24%
3-Month CP	7.50%	7.50%	7.13%	7.65%	7.75%	6.15%
6-Month CP	7.65%	7.65%	7.45%	7.70%	7.65%	6.39%
1-year CP	7.90%	7.90%	7.77%	7.30%	7.60%	6.60%
1-year Gilt	5.95%	6.00%	5.78%	5.67%	5.82%	5.54%
3-year Gilt	6.34%	6.27%	6.31%	6.03%	6.43%	5.76%
5-year Gilt	6.57%	6.51%	6.68%	6.38%	6.90%	5.95%
1-year AAA	7.38%	7.48%	7.45%	7.19%	7.57%	6.52%
3-year AAA	7.39%	7.42%	7.60%	7.24%	7.59%	6.66%
5-year AAA	7.47%	7.49%	7.66%	7.31%	7.67%	6.80%
10-year G-sec	6.94%	6.90%	6.98%	6.67%	7.02%	6.29%
Net LAF (Rs Cr)	147212	133691	214939	274311	245161	261993
Forex reserves (\$ bn)	682.32	681.38	690.69	728.49	642.49	691.49

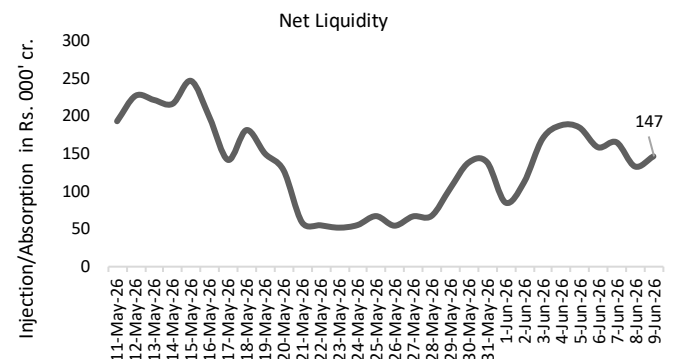
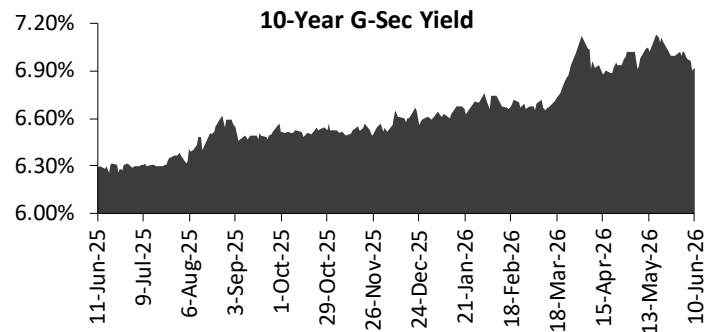
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	7.52	8.26	8.31	9.54	10.02
1 Year	5.95	7.38	8.12	8.17	9.40	9.88
3 Year	6.34	7.39	8.13	8.18	9.41	9.89
5 Year	6.57	7.47	8.31	8.36	9.59	10.07
10 Year	6.94	7.59	8.43	8.48	9.71	10.19

Rs. Cr (Debt)	FII Inv 9 June	MF Inv 8 June
Buy	676	27,830
Sell	359	31,388
Net	316	-3,558
Net (MTD)	2,805	-32,404
Net (YTD)	-308	-418,413

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	55.0 (May-26)	56.9 (Feb-26)	58.3 (May-25)
India Service PMI	59.8 (May-26)	58.1 (Feb-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

- Afcons Infrastructure secured a Rs 5,301 crore Vadhvan Port breakwater project, significantly boosting its order book and marine infrastructure presence.
- ASK Property Fund launched a Rs 3,500 crore debt fund focused on housing projects, aiming to finance residential developments and capitalize on strong real estate demand.
- Vascon Engineers received a Letter of Intent (LoI) worth Rs 347.43 crore from the Central Public Works Department (CPWD), Guwahati.
- Zee Entertainment received board's approval for raising capital of a minimum of Rs 2,300 crore in one or more phases/tranches to fund the company's strategic and business initiatives.
- Power Grid Corporation of India received board's approval for the upgradation of SCADA and associated systems of NTAMC/RTAMC at an estimated cost of Rs 485.04 crore.
- Cyera raised \$600 million at a \$12 billion valuation, highlighting strong investor interest in cybersecurity and data protection.
- Addverb Technologies is planning to raise over \$100 million, aiming to expand its robotics and automation capabilities.
- Exponent Energy raised Rs 200 crore (\$21.1 million) to scale its commercial EV charging and battery technology business.
- Hoola Health raised \$5 million in funding from Peak XV's Surge and others, supporting expansion in paediatric healthcare services.



Global market indices	10 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49918.78	-1.87	0.62	7.72	16.45
Nikkei 225	64179.27	-1.89	2.34	25.68	67.96
FTSE	10254.81	0.27	0.21	0.77	15.83
Hang Seng	24407.96	-0.64	-7.52	-1.53	1.01
Taiwan	43225.54	-3.31	3.90	36.26	94.34

Global debt	10 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.55	4.53	4.38	4.15	4.30	4.47
UK 10-Year (%)	4.95	4.92	4.92	4.54	4.88	4.55
German 10-Year (%)	3.07	3.06	3.00	2.85	3.01	2.53
Japan 10-Year (%)	2.69	2.68	2.48	2.19	2.35	1.48

Domestic	10 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147146	-3.52	-2.60	0.28	52.71
Silver (Rs / Kg)	233283	-5.15	-8.73	1.37	118.02
Aluminium (Rs / Kg)	374	-3.09	0.96	5.36	55.38
Copper (Rs / kg)	1326	-2.45	0.66	13.26	48.53
Lead (Rs / kg)	208	0.07	1.89	5.43	13.58
Zinc (Rs /Kg)	365	-2.05	4.11	13.09	42.93
Nickel (Rs / kg)	1752	-2.29	-4.51	7.07	30.84

Global	10 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4262.20	-1.78	-9.30	-5.86	27.86
Silver (oz/\$)	6513.00	-4.84	-18.25	-7.58	77.66
Brent (\$/bbl)	93.10	1.80	-8.09	-21.34	39.23
NYMEX crude (\$/bbl)	90.03	2.07	-5.65	-11.20	38.55

Global markets

- Wall Street stocks closed lower on Wednesday, weighed down by continued losses in technology stocks and hotter inflation data amid persisting geopolitical worries.
- 10-year US bond yield ended higher at 4.55% renewed inflationary concerns following escalating Middle East tensions
- FTSE index closed higher on Wednesday, supported by gains in energy and consumer staples stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- US annual inflation rate rose to 4.2% in May 2026, compared to 3.8% in April 2026 while the core inflation rate climbed to 2.9% from 2.8%.

Commodity

- Crude oil prices rose by \$1.83 to \$90.03 a barrel on the NYMEX as escalating geopolitical tensions, after US President's warning of a potential US attack on Iran, heightened fears of supply disruptions.
- Domestic gold prices declined sharply due to strong US dollar index.

Forthcoming results

NA	NA
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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
Debt Indicators	Currency in circulation (Rs billion)	42826.4	42288.66	41320	40445	39800	39079	38551	38184	38071	38097
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%	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%
	Call rate	5.55%	5.20%	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%
	Forex reserves (\$ billion; mthly. avg.)	689.49	700	703	724	696	692	688	699	701	693

	GDP	NA	NA	NA	7.80%			7.40%			
	Fiscal deficit (Rs billion)	NA	3623.03	2665.2	2712.42	1255.65	-1208.29	1515.27	2520.21	-250.3	1297.37
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	8.00%	7.20%	0.50%	4.60%	4.10%
	Exports, \$ billion	NA	43.56	38.92	36.61	36.56	38.51	38.13	34.38	36.38	35.1
	Imports, \$ billion	NA	71.94	59.59	63.71	71.24	63.55	62.66	76.06	68.53	61.59
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55	56.6	59.2	57.7	59.3
	Services PMI	59.80	58.80	57.5	58.1	58.5	58	59.8	58.8	60.9	62.9
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	174550	170276	195936	189017	186315
	India crude oil import (mbpd)	NA	NA	19.00	19.43	21.09	21.59	21.24	21.01	20.21	19.60

Sector update	Auto – Passenger vehicles	NA	11.60%	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%
	Auto – Two-wheelers	NA	19.30%	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%
	Auto – Commercial vehicles	NA	13.60%	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%
	Auto – Tractors	NA	29.10%	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%
	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%
	Infra – Steel	NA	2.20%	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%
	Infra – Cement	NA	4.00%	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%

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