

Daily Market Monitor

June 12, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	11 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23162	-0.23	-2.75	3.72	-7.87
BSE Sensex	73833	-0.20	-2.87	2.62	-10.52
BSE 100	24572	-0.41	-2.88	4.98	-6.96
BSE 200	10778	-0.51	-2.95	6.12	-5.94
BSE 500	34581	-0.53	-3.08	7.45	-5.53
BSE SmallCap	52087	-0.86	-2.66	20.52	-4.04
BSE MidCap	45059	-0.98	-3.94	11.15	-3.17
BSE LargeCap	9099	-0.42	-2.77	5.44	-6.27
Sectoral indices					
BSE IT	27061	-1.78	-5.16	-3.10	-29.29
BSE Oil & Gas	25582	-0.68	-4.82	0.09	-8.32
BSE FMCG	17996	-0.77	-5.14	7.28	-12.26
BSE Auto	56767	-0.15	-3.64	7.89	6.29
BSE Bankex	62158	0.16	1.28	9.86	-2.47
BSE Teck	14428	-0.91	-2.21	-2.03	-21.53
BSE Capital Goods	77161	-1.19	-1.65	20.11	8.43
BSE Consumer Durable	56949	-0.96	-2.28	8.23	-2.78

Turnover (Rs Cr)	11 June	10 June
BSE Cash	9068	8413
NSE Cash	112502	119714
NSE F&O	8437816	8180296

Rs. Cr (Equity)	FII Inv 10 June	MF Inv 8 June	DII Inv 11 June
Buy	14,529	11,768	16,823
Sell	15,966	9,602	12,598
Net	-1,438	2,165	4,225
Net (MTD)	-39,758	30,674	52,606
Net (YTD)	-284,376	275,895	429,391

	11 June	1Day	Month ago	Year ago
USD	95.72	95.19	95.20	85.45
GBP	128.05	127.46	129.38	115.23
Euro	110.50	109.96	111.93	97.56
100 Yen	59.61	59.35	60.60	58.89

RBI reference rate

Indian markets

- Indian equity benchmarks ended lower on Thursday owing to profit booking in IT stocks and continuing foreign fund outflows.
- The top losers were Infosys, HCL Technologies, Adani Ports and Special Economic Zone, Eternal, and Bajaj Finance, down 1.37-2.25%.
- The top gainers were Mahindra & Mahindra, ICICI Bank, Kotak Mahindra Bank, JSW Steel and Sun Pharmaceutical Industries, up 0.71-1.84%.

Indian debt

- The interbank call-money rate ended flat at 5.20% on Thursday.
- Government bond prices ended higher on Thursday, supported by fall in oil prices.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.92% on Thursday compared to 6.94% on Wednesday.

Indian Rupee

- The spot rupee ended lower against the United States dollar on Thursday amid rising demand for dollars from oil companies.

Regulatory

- Sebi has proposed a new mechanism to harmonise price bands and pre-open auction prices for stocks listed on multiple exchanges, aiming to address price divergences that arise when a stock remains untraded on one exchange but continues to trade on another.

Economy and Government

- The World Bank has projected India's GDP growth at 6.6% in FY27, down from an estimated 7.7% in FY26. The moderation reflects a slowdown in private demand growth as higher crude oil, natural gas and fertilizer prices feed into broader input costs.
- Prime Minister Narendra Modi stated that India remains on a strong growth trajectory despite global uncertainties, highlighting economic resilience.
- The Centre has granted administrative and technical approval worth Rs 1,663.15 crore for the first phase of the Kollam-Theni National Highway (NH-183) development project
- The Centre has approved Rs 531 crore in financial aid for Rajasthan's solar power projects, supporting renewable energy expansion and sector viability.
- The Centre has exempted petrol blended with higher proportions of ethanol from central excise duty
- Union Home Minister Amit Shah launched 'Vinimay' (Land Port Management System) to streamline cargo movement, enhance efficiency, and digitalize operations across India's land ports.
- The government may reassess fertiliser subsidy estimates due to declining urea import prices, which could ease fiscal burden.

Domestic Debt Market Indicators

Instrument	11 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	5.20%	4.75%	4.75%	7.00%	5.00%
3-Month T-Bill	5.27%	5.28%	5.30%	5.30%	5.40%	5.36%
6-Month T-Bill	5.54%	5.55%	5.50%	5.52%	5.51%	5.41%
1-year T-Bill	5.86%	5.88%	5.64%	5.61%	5.70%	5.51%
3-Month CD	6.90%	6.85%	6.60%	7.17%	7.35%	5.77%
6-Month CD	7.36%	7.30%	7.00%	7.17%	7.30%	6.17%
1-year CD	7.65%	7.50%	7.45%	6.98%	7.25%	6.30%
3-Month CP	7.45%	7.50%	7.25%	7.50%	7.75%	6.21%
6-Month CP	7.68%	7.65%	7.43%	7.60%	7.65%	6.55%
1-year CP	8.00%	7.90%	7.85%	7.30%	7.60%	6.69%
1-year Gilt	5.92%	5.95%	5.87%	5.69%	5.82%	5.60%
3-year Gilt	6.26%	6.34%	6.39%	6.06%	6.43%	5.79%
5-year Gilt	6.53%	6.57%	6.78%	6.36%	6.90%	5.98%
1-year AAA	7.48%	7.38%	7.55%	7.19%	7.57%	6.55%
3-year AAA	7.48%	7.39%	7.66%	7.24%	7.59%	6.69%
5-year AAA	7.52%	7.47%	7.72%	7.31%	7.67%	6.83%
10-year G-sec	6.92%	6.94%	7.04%	6.65%	7.02%	6.30%
Net LAF (Rs Cr)	146007	147212	194232	239897	245161	257819
Forex reserves (\$ bn)	682.32	681.38	690.69	728.49	642.49	691.49

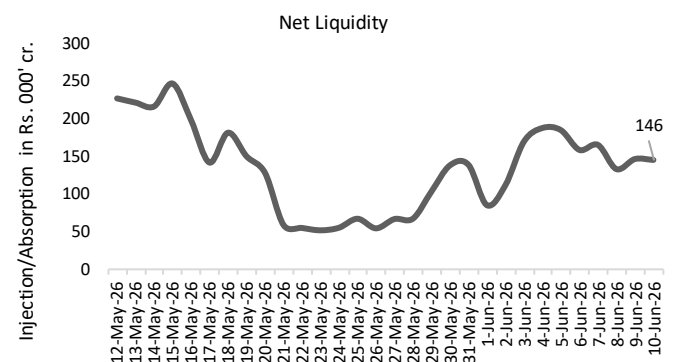
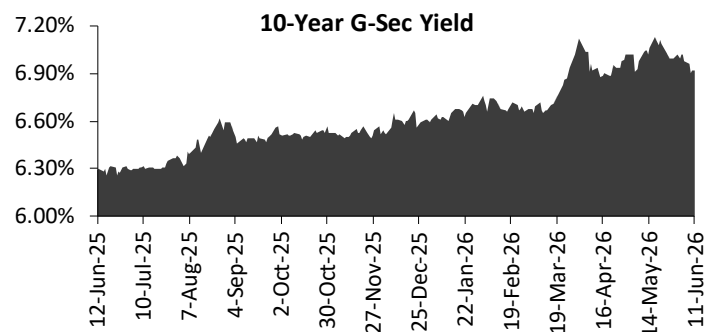
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	7.58	8.32	8.37	9.60	10.08
1 Year	5.92	7.48	8.22	8.27	9.50	9.98
3 Year	6.26	7.48	8.22	8.27	9.50	9.98
5 Year	6.53	7.52	8.36	8.41	9.64	10.12
10 Year	6.92	7.64	8.48	8.53	9.76	10.24

Rs. Cr (Debt)	FII Inv 10 June	MF Inv 8 June
Buy	581	27,830
Sell	134	31,388
Net	447	-3,558
Net (MTD)	3,252	-32,404
Net (YTD)	139	-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

- Vascon Engineers secured a Rs 348 crore order in Guwahati, boosting its order book and execution pipeline.
- DOMS Industries acquired Reynolds brand assets for \$3.7 million, expanding its stationery portfolio.
- SatSure secured a \$2.6 million grant to develop AI-powered earth observation models, strengthening its capabilities in geospatial analytics and climate intelligence solutions.
- TCS announced a global strategic partnership with Anthropic to scale enterprise AI adoption and solutions.
- Oil India signed a clean energy collaboration pact with Canada's PTRC, focusing on advancing sustainable energy solutions.
- Coram AI has raised \$35 million in funding co-led by ANSA Capital and Battery Ventures, to expand its AI-driven physical security solutions and scale global operations.
- Ethereal Machines raised \$28.5 million in a Series B round led by Avataar Ventures, to expand precision manufacturing capabilities.
- SatSure Analytics secured a Rs 246 million (\$2.57 million) grant from the country's space regulator.
- Aum Ventures launched its second fund, Aum Ventures - India Innovation Fund II, with a target corpus of Rs 750 crore .



Global market indices	11 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	50848.75	1.86	2.30	9.73	18.62
Nikkei 225	64217.27	0.06	2.88	25.76	67.14
FTSE	10303.88	0.48	0.34	1.25	16.24
Hang Seng	24249.29	-0.65	-8.17	-2.17	-0.48
Taiwan	43149.46	-0.18	3.25	36.02	92.03

Global debt	11 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.45	4.55	4.42	4.21	4.30	4.41
UK 10-Year (%)	4.91	4.95	5.03	4.68	4.88	4.55
German 10-Year (%)	3.03	3.07	3.04	2.93	3.01	2.54
Japan 10-Year (%)	2.68	2.69	2.51	2.17	2.35	1.46

Domestic	11 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	144782	-1.61	-3.71	-1.33	50.45
Silver (Rs / Kg)	232591	-0.30	-9.22	1.07	120.48
Aluminium (Rs / Kg)	372	-0.55	-0.97	4.78	53.48
Copper (Rs / kg)	1338	0.90	0.04	14.28	52.83
Lead (Rs / kg)	207	-0.24	0.90	5.17	12.29
Zinc (Rs /Kg)	363	-0.64	2.95	12.36	41.51
Nickel (Rs / kg)	1728	-1.40	-5.89	5.57	29.57

Global	11 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4110.55	-3.56	-12.47	-9.21	23.72
Silver (oz/\$)	6461.00	-0.80	-18.59	-8.32	76.87
Brent (\$/bbl)	90.38	-2.92	-13.27	-23.63	29.54
NYMEX crude (\$/bbl)	87.71	-2.58	-10.56	-13.48	28.70

Global markets

- Wall Street stocks ended higher on Thursday after comments from US president triggered hopes for potential US-Iran peace deal.
- US 10yr yield ended lower at 4.45% tracking sharp fall in global crude oil prices amid hopes of halt on geopolitical conflicts.
- FTSE index ended higher on Thursday led by gains in financial stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- The World Bank cut its global growth forecast for 2026 to 2.5% due to the war in the Middle East, and said growth could slow to just 1.3% if energy supply disruptions prove more severe and come with substantial stress in financial markets.
- US Initial Jobless Claims rose by 4,000 to 229,000 in the first week of June compared to 225,000 in the previous period.
- US Producer Prices accelerated to 6.5% in May 2026 compared to a downwardly revised 5.7% rate in April 2026.
- The European Central Bank raised interest rates by 25 basis points to 2.40%, deposit facility rate by 25 basis points to 2.25% and marginal lending facility rate by 25 basis points to 2.65% in June 2026, to reinforce its commitment to stabilizing inflation at the 2% medium-term target.

Commodity

- Crude oil prices fell by \$2.72 to \$90.38 a barrel on the NYMEX after US government terminated plans to strike Iran which raised expectations for the US-Iran peace deal.
- Domestic gold prices ended lower due to weak demand.

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	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%	-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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