Daily Market Monitor

June 15, 2026

Domestic Market Performance

Indian market indices	12 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23623	1.99	1.04	5.78	-5.08
BSE Sensex	75528	2.30	1.30	4.98	-7.55
BSE 100	25089	2.11	1.17	7.19	-3.91
BSE 200	11009	2.14	1.24	8.40	-2.75
BSE 500	35343	2.20	1.27	9.82	-2.24
BSE SmallCap	53554	2.82	3.22	23.91	0.04
BSE MidCap	46135	2.39	0.98	13.81	0.67
BSE LargeCap	9288	2.08	1.27	7.64	-3.21
Sectoral indices					
BSE IT	27168	0.39	-1.16	-2.72	-28.27
BSE Oil & Gas	26151	2.23	-2.68	2.31	-4.27
BSE FMCG	18140	0.80	-2.80	8.14	-10.45
BSE Auto	57913	2.02	0.62	10.07	10.32
BSE Bankex	63988	2.94	6.06	13.09	1.23
BSE Teck	14568	0.97	1.27	-1.08	-19.99
BSE Capital Goods	78892	2.24	3.51	22.80	13.07
BSE Consumer Durable	58426	2.59	3.72	11.04	1.80

Turnover (Rs Cr)	12 June	11 June
BSE Cash	9046	9068
NSE Cash	118838	112502
NSE F&O	18751637	8437816

Rs. Cr (Equity)	FII Inv 11 June	MF Inv 10 June	DII Inv 12 June
Buy	14,624	12,627	18,877
Sell	15,769	12,319	13,536
Net	-1,145	308	5,341
Net (MTD)	-40,903	35,420	57,948
Net (YTD)	-285,521	280,641	434,732

	12 June	1Day	Month ago	Year ago
USD	95.38	95.72	95.56	85.54
GBP	127.84	128.05	129.57	116.01
Euro	110.36	110.50	112.34	98.55
100 Yen	59.50	59.61	60.71	59.52

RBI reference rate

Indian markets

- Indian equity benchmark indices ended higher on Friday, as easing geopolitical tensions, fuelled by hopes of a US-Iran peace deal, led to a decline in crude oil prices, improving inflation expectations and global risk sentiment.
- The top gainers were Shriram Finance, Bajaj Finance, L&T, Indigo and Tata Motors Passenger Vehicles Ltd., up 4.02-8.10%.
- The top losers were Nestle India, ONGC, Tech Mahindra, SBI Life Insurance and Tata Consumer Products, down 0.71-3.23%.

Indian debt

- The interbank call-money rate ended flat at 5.20% on Friday.
- Government bond prices ended higher on Thursday, due to a fall in crude oil prices, driven by renewed optimism over a potential US-Iran peace deal, improving India's inflation outlook.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.90% on Friday compared to 6.92% on Thursday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Friday, supported by a decline in crude oil prices and hopes of a potential US-Iran peace agreement.

Regulatory

- SEBI plans to review the short-selling and stock lending & borrowing (SLB) framework to deepen capital markets, improve liquidity, and enhance market efficiency.

Economy and Government

- India's retail inflation rose to 3.93% in May 2026 compared to 3.48% in April 2026, driven by higher food and fuel prices, though remaining within RBI's target range.
- According to RBI data, India's forex reserves declined to $681.61 billion, compared to $682.32 billion in the previous week.
- Chhattisgarh signed investment MoUs worth more than Rs 9,500 crore with seven companies at a roadshow here, a move expected to create over 7,800 jobs.
- Defence Minister Rajnath Singh stated that Project Kusha (indigenous air defence system) will be a game changer for India's security capabilities.
- Odisha has announced free education from kindergarten to postgraduate level in government institutions, aiming to improve access and human capital development.
- The government has restricted bulk purchase of petrol and diesel at retail fuel pumps, aiming to curb misuse, ensure equitable fuel distribution, and maintain supply discipline.

Domestic Debt Market Indicators

Instrument	12 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	5.20%	4.75%	4.70%	7.00%	5.00%
3-Month T-Bill	5.27%	5.27%	5.30%	5.33%	5.40%	5.37%
6-Month T-Bill	5.49%	5.54%	5.49%	5.52%	5.51%	5.43%
1-year T-Bill	5.85%	5.86%	5.66%	5.61%	5.70%	5.50%
3-Month CD	6.86%	6.90%	6.65%	7.22%	7.35%	5.80%
6-Month CD	7.33%	7.36%	7.05%	7.30%	7.30%	6.16%
1-year CD	7.60%	7.65%	7.45%	7.00%	7.25%	6.34%
3-Month CP	7.40%	7.45%	7.40%	7.55%	7.75%	6.22%
6-Month CP	7.68%	7.68%	7.52%	7.67%	7.65%	6.55%
1-year CP	8.00%	8.00%	7.85%	7.31%	7.60%	6.69%
1-year Gilt	6.01%	5.92%	5.91%	5.77%	5.82%	5.60%
3-year Gilt	6.20%	6.26%	6.45%	6.09%	6.43%	5.83%
5-year Gilt	6.49%	6.53%	6.80%	6.41%	6.90%	5.98%
1-year AAA	7.44%	7.48%	7.57%	7.28%	7.57%	6.65%
3-year AAA	7.39%	7.48%	7.68%	7.30%	7.59%	6.77%
5-year AAA	7.47%	7.52%	7.74%	7.34%	7.67%	6.83%
10-year G-sec	6.89%	6.92%	7.05%	6.67%	7.02%	6.29%
Net LAF (Rs Cr)	158987	146007	228343	248501	245161	276093
Forex reserves ($ bn)	681.61	682.32	690.69	728.49	642.49	691.49

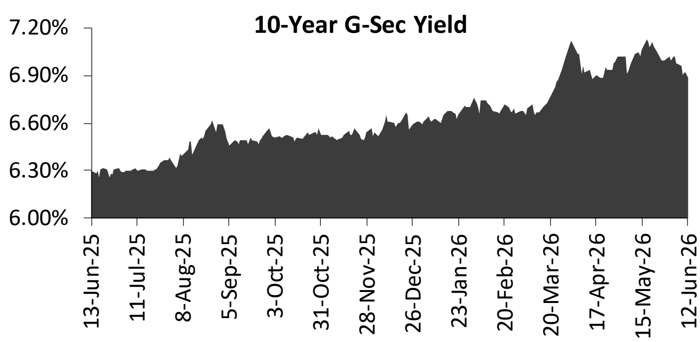
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.49	7.55	8.29	8.34	9.57	10.05
1 Year	6.01	7.44	8.18	8.23	9.46	9.94
3 Year	6.20	7.39	8.13	8.18	9.41	9.89
5 Year	6.49	7.47	8.31	8.36	9.59	10.07
10 Year	6.89	7.59	8.43	8.48	9.71	10.19

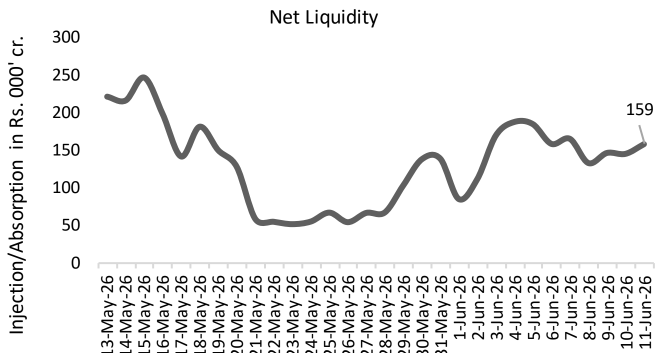
Rs. Cr (Debt)	FII Inv 11 June	MF Inv 10 June
Buy	659	27,002
Sell	561	37,168
Net	99	-10,166
Net (MTD)	3,351	-52,102
Net (YTD)	237	-438,111

Economic Indicator	Latest	Quarter/Fortnight	Year Ago
CPI	3.93% (May'26)	3.21% (Feb'26)	2.82% (May'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*	1.22% (May 31, 2026)	-0.68% (May 15, 2026)	
Bank Deposit Growth*	1.55% (May 31, 2026)	-0.12% (May 15, 2026)	

Capital markets

- Rekise Marine has raised $9.7 million in funding led by Nikhil Kamath's firm and Accel, to expand its marine and maritime technology solutions.
- Equal AI has raised $30 million in funding to expand its AI-powered assistant platform in India, strengthening its capabilities in enterprise AI solutions and automation.
- SEBI has approved IPOs of Bombay Coated, Bonfiglioli Transmissions, and Swaraj Green Power, supporting primary market activity.
- Board of directors at Krishna Institute of Medical Sciences approved the preferential allotment of 77.02 lakh warrants worth Rs 600 crore to the promoter group.
- SEPC received a Letter of Acceptance (LoA) worth Rs 673.32 crore from Steel Authority of India (SAIL) – IISCO Steel Plant (ISP), Burnpur.
- Board of directors at Krishna Institute of Medical Sciences approved the preferential allotment of 77.02 lakh warrants worth Rs 600 crore to the promoter group.
- Meesho plans to acquire Kirana Club for Rs 202 crore, strengthening its presence in the kirana and e-commerce ecosystem.





Global market indices	12 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51202.26	0.70	2.90	10.49	19.16
Nikkei 225	66020.04	2.81	5.22	29.29	72.95
FTSE	10471.72	1.63	2.01	2.90	17.86
Hang Seng	24718.1	1.93	-6.19	-0.28	2.84
Taiwan	44169.04	2.36	5.42	39.23	98.18

Global debt	12 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.48	4.45	4.46	4.27	4.30	4.36
UK 10-Year (%)	4.84	4.91	5.11	4.79	4.88	4.47
German 10-Year (%)	3.00	3.03	3.10	2.94	3.01	2.48
Japan 10-Year (%)	2.64	2.68	2.56	2.18	2.35	1.45

Domestic	12 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	147800	2.08	-2.53	0.73	51.66
Silver (Rs / Kg)	242582	4.30	-8.41	5.41	129.94
Aluminium (Rs / Kg)	377	1.11	-0.55	5.95	55.13
Copper (Rs / kg)	1346	0.59	-1.54	14.96	53.42
Lead (Rs / kg)	210	1.47	1.64	6.72	15.13
Zinc (Rs /Kg)	370	2.00	1.97	14.61	44.62
Nickel (Rs / kg)	1722	-0.34	-5.75	5.22	30.45

Global	12 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4098.02	-0.30	-13.14	-9.49	23.26
Silver (oz/$)	6394.00	-1.04	-24.99	-9.27	76.92
Brent ($/bbl)	87.33	-3.37	-18.97	-26.21	25.91
NYMEX crude ($/bbl)	84.88	-3.23	-16.93	-16.28	24.75

Upcoming market indicators

Date	Indicator	Previous
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%
June 19	Japan Inflation Rate, May	1.4%
June 22	India Infrastructure Output, May	1.7%

Global markets

- Wall Street stocks closed higher on Friday, supported by optimism over a potential US–Iran peace deal and the strong debut of SpaceX.
- 10-year US bond yield ended higher at 4.48% due to short covering at lower level.
- FTSE index closed higher on Friday, as optimism over a potential US–Iran peace deal boosted risk sentiment, while lower crude oil prices eased inflation concerns.
- Asian markets were trading mostly lower at 8.30 AM.
- The United Kingdom's GDP grew 1.2% year-on-year in April 2026, unchanged from the 1.2% growth recorded in March 2026.
- UK Industrial production fell 0.2% in April 2026, following a flat reading in the preceding period while the manufacturing production rose to 1.0% from a 1.2% gain.
- UK construction output dropped 1.0% year-on-year in April 2026, compared to a 0.3% decline in the previous month.
- The UK trade deficit narrowed to £8.44 billion in April 2026 from £9.66 billion in March, driven by higher exports (1.1%) and a decline in imports (0.4%), supported by strong goods shipments and lower fuel imports.

Commodity

- Crude oil prices fell by $2.83 to $84.88 a barrel on the NYMEX as easing fears of further escalation in the US–Iran conflict reduced concerns over potential supply disruptions.
- Domestic gold prices ended higher due to value buying.

Forthcoming results

NA	NA

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%