Daily Market Monitor

June 17, 2026

Domestic Market Performance

Indian market indices	16 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23989	0.57	1.46	7.42	-3.84
BSE Sensex	76808	0.71	2.09	6.76	-6.10
BSE 100	25529	0.60	1.91	9.07	-2.44
BSE 200	11194	0.52	1.89	10.22	-1.37
BSE 500	35940	0.49	2.00	11.68	-0.83
BSE SmallCap	54624	0.53	4.77	26.39	1.96
BSE MidCap	47049	0.36	2.28	16.06	2.05
BSE LargeCap	9438	0.51	1.81	9.37	-1.82
Sectoral indices					
BSE IT	27912	1.66	3.52	-0.05	-27.33
BSE Oil & Gas	26775	0.85	-0.22	4.76	-2.61
BSE FMCG	18421	1.12	-2.15	9.82	-8.64
BSE Auto	59266	-0.35	3.21	12.64	13.15
BSE Bankex	64545	0.20	6.70	14.08	2.40
BSE Teck	14877	1.20	2.12	1.01	-19.33
BSE Capital Goods	80121	0.54	4.29	24.72	13.91
BSE Consumer Durable	60154	0.92	3.42	14.32	4.24

Turnover (Rs Cr)	16 June	15 June
BSE Cash	12762	10587
NSE Cash	119619	138642
NSE F&O	55257547	24444899

Rs. Cr (Equity)	FII Inv 15 June	MF Inv 12 June	DII Inv 16 June
Buy	16,452	14,738	13,553
Sell	15,438	10,734	13,553
Net	1,014	4,005	0
Net (MTD)	-40,486	41,555	61,137
Net (YTD)	-285,104	286,777	437,921

	16 June	1Day	Month ago	Year ago
USD	94.70	94.68	95.93	86.02
GBP	126.91	127.31	128.09	116.75
Euro	109.70	109.91	111.63	99.40
100 Yen	59.11	59.13	60.54	59.67

Indian markets

- Indian equity benchmark indices ended higher on Tuesday, buoyed by optimism around the peace deal in West Asia, which drove crude oil prices lower and alleviated inflation and growth concerns.
- The top gainers were HCL Technologies, Tata Consumer Products, NTPC, Bajaj Finserv and Hindustan Unilever, up 1.90-3.68%.
- The top losers were Hindalco Industries, JSW Steel, HDFC Life Insurance Company, Eicher Motors and Maruti Suzuki India, down 0.85-2.95%.

Indian debt

- The interbank call-money rate ended flat at 5.35% on Tuesday.
- Government bond prices were flat on Tuesday, as traders awaited clarity on the US-Iran peace deal offsetting support from lower crude oil prices.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.88% on Tuesday.

Indian Rupee

- The spot rupee ended higher against the United States (US) dollar on Tuesday, supported by a persistent decline in global crude oil prices, which eased concerns about the import bill. Meanwhile, investors awaited further details on the peace deal in West Asia and the US Federal Reserve's next policy cues.

Regulatory

- Sebi has introduced a new framework that allows Alternative Investment Funds (AIFs) to retain liquidation proceeds beyond their fund life, subject to specific conditions.
- The Insurance Regulatory and Development Authority of India (IRDAI) proposed regulatory amendments to allow mergers between insurers and non-insurance holding companies, alongside easing transaction fees and refining promoter/shareholding norms to improve ease of doing business and sectoral growth.

Economy and Government

- Tamil Nadu's government has empowered the Chennai Metropolitan Development Authority (CMDA) to grant planning permissions for high-rise buildings in the Chennai Metropolitan Area.
- The Ministry of New and Renewable Energy (MNRE) simplified the ALMM List-II exemption process, allowing rooftop solar projects with modules installed before June 1, 2026 but facing commissioning delays to apply via the NISE portal with supporting documentation.
- Department for Promotion of Industry and Internal Trade (DPIIT) has extended the quality control order (QCO) compliance deadline for non-leather footwear MSMEs by one year to July 31, 2027, providing additional time to obtain BIS certification and permitting limited non-commercial imports for R&D purposes.

Domestic Debt Market Indicators

Instrument	16 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.35%	5.23%	5.31%	7.00%	4.90%
3-Month T-Bill	5.24%	5.26%	5.42%	5.34%	5.40%	5.35%
6-Month T-Bill	5.50%	5.50%	5.57%	5.51%	5.51%	5.43%
1-year T-Bill	5.80%	5.82%	5.71%	5.59%	5.70%	5.50%
3-Month CD	6.55%	6.70%	6.95%	7.36%	7.35%	5.88%
6-Month CD	7.18%	7.20%	7.17%	7.48%	7.30%	6.15%
1-year CD	7.40%	7.45%	7.55%	7.20%	7.25%	6.34%
3-Month CP	7.00%	7.13%	7.68%	7.67%	7.75%	6.30%
6-Month CP	7.60%	7.60%	7.75%	7.85%	7.65%	6.58%
1-year CP	7.80%	7.85%	7.90%	7.55%	7.60%	6.67%
1-year Gilt	5.86%	5.90%	6.02%	5.76%	5.82%	5.56%
3-year Gilt	6.17%	6.18%	6.53%	6.10%	6.43%	5.83%
5-year Gilt	6.47%	6.46%	6.86%	6.44%	6.90%	5.97%
1-year AAA	7.40%	7.40%	7.71%	7.37%	7.57%	6.68%
3-year AAA	7.38%	7.37%	7.77%	7.38%	7.59%	6.80%
5-year AAA	7.43%	7.43%	7.83%	7.42%	7.67%	6.86%
10-year G-sec	6.88%	6.88%	7.06%	6.70%	7.02%	6.28%
Net LAF (Rs Cr)	151131	172856	248222	75484	245161	268071
Forex reserves ($ bn)	681.61	682.32	696.99	716.81	642.49	696.66

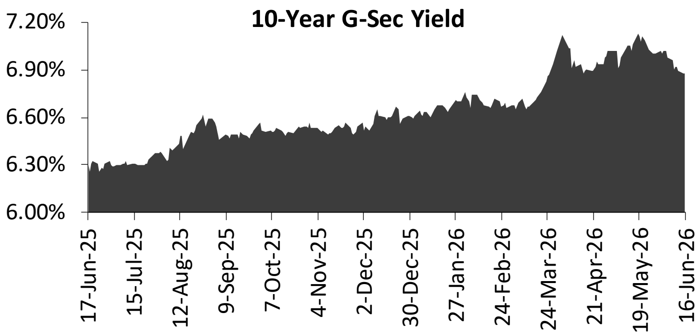
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	7.38	8.10	8.18	9.41	9.89
1 Year	5.86	7.40	8.12	8.20	9.43	9.91
3 Year	6.17	7.38	8.10	8.18	9.41	9.89
5 Year	6.47	7.43	8.25	8.33	9.56	10.04
10 Year	6.88	7.55	8.37	8.45	9.68	10.16

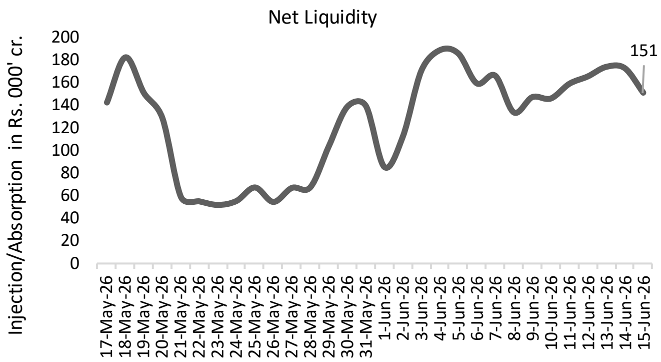
Rs. Cr (Debt)	FII Inv 15 June	MF Inv 12 June
Buy	1,293	34,275
Sell	539	41,562
Net	754	-7,286
Net (MTD)	5,348	-70,035
Net (YTD)	2,234	-456,044

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.93% (May-26)	3.21% (Feb-26)	3.03% (May-25)
WPI	9.68% (May-26)	2.18% (Feb-25)	-0.20% (May-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

- Inox Wind Limited (IWL) signed an MoU with Inox Clean Energy to supply 1,500 MW of wind turbines for projects across India.
- Adani Ports & Special Economic Zone (APSEZ) plans to invest up to $100 million in two phases with Kaleris to accelerate terminal automation and optimisation.
- Trunativ raised $30 million in Series B funding led by OrbiMed, aimed at scaling product development and expanding its health and wellness portfolio.





Global market indices	16 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51999.67	0.64	4.99	12.21	22.31
Nikkei 225	69404.5	0.13	13.02	35.92	81.16
FTSE	10494.21	0.61	2.93	3.12	18.24
Hang Seng	24493.95	-1.40	-5.66	-1.19	1.80
Taiwan	45809.19	0.91	11.26	44.40	107.75

Global debt	16 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.43	4.47	4.59	4.23	4.30	4.46
UK 10-Year (%)	4.78	4.83	5.18	4.77	4.88	4.54
German 10-Year (%)	2.94	2.95	3.15	2.95	3.01	2.53
Japan 10-Year (%)	2.64	2.57	2.71	2.28	2.35	1.46

Domestic	16 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	150663	0.01	-4.77	2.68	51.61
Silver (Rs / Kg)	249179	-0.92	-7.20	8.28	133.53
Aluminium (Rs / Kg)	362	-2.57	-5.23	1.98	48.74
Copper (Rs / kg)	1349	-0.78	0.31	15.23	52.88
Lead (Rs / kg)	208	-0.10	1.34	5.58	13.96
Zinc (Rs /Kg)	370	-0.15	0.49	14.56	45.02
Nickel (Rs / kg)	1713	-1.28	-5.64	4.64	28.93

Global	16 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4329.88	1.44	-7.43	-4.37	26.11
Silver (oz/$)	7013.00	1.55	-17.23	-0.48	93.09
Brent ($/bbl)	78.96	-5.06	-27.73	-33.28	7.82
NYMEX crude ($/bbl)	76.05	-5.82	-27.86	-24.99	5.96

Upcoming market indicators

Date	Indicator	Previous
June 17	UK Inflation Rate, May	2.8%
June 19	Japan Inflation Rate, May	1.4%
June 22	India Infrastructure Output, May	1.7%
June 25	US GDP Growth Rate QoQ Final Q1	0.5%
June 28	India Bank Loan Growth, Jun/12	17.7%

Global markets

- Wall Street stocks closed mixed on Tuesday, with Dow Jones rising on the back of sector-specific strength, including gains linked to SpaceX, while Nasdaq declined due to profit-taking in technology stocks.
- 10-year US bond yield ended lower at 4.43% due to easing oil prices and caution ahead of Federal Reserve's policy meet outcome.
- FTSE index closed higher on Tuesday, supported by gains in financial and industrial stocks, amid easing oil prices.
- Asian markets were trading mostly higher at 8.30 AM.
- US Housing Starts decreased to 15.4% in May 2026 compared to 8.5% in April 2026.
- US export prices rose to 11.2% in May 2026 compared to 8.8% in April, while import prices increased to 6.7% compared to 4.2%, indicating a sharp acceleration in trade-related price pressures.
- Eurozone ZEW Indicator of Economic Sentiment climbed by 18.6 points 9.5 in June 2026 compared with 9.1 decline in May 2026.
- Eurozone Wage Growth increased 3.4% year-on-year in the first quarter of 2026, compared to a 3.1% rise in the last three months of 2025.
- The Bank of Japan raised its key short-term rate by 25 bps to 1.0% in June 2026, to curb inflation risks from rising energy costs, while maintaining accommodative conditions and signaling further data-dependent rate hikes.
- Japan trade deficit narrowed sharply to JPY 378.7 billion in May 2026 (vs. JPY 662.5 billion a year earlier), as exports rose 17% to JPY 9,511.5 billion while imports increased 12.5% to JPY 9,890.2 billion, with faster export growth outpacing imports.
- Japan Machinery orders rose 15.6% to JPY 1,098.5 billion in April 2026, compared to a 5.9% rise in March 2026.

Commodity

- Crude oil prices fell by $4.70 to $76.05 a barrel on the NYMEX on hopes of a US-Iran deal to end the conflict.
- Domestic gold prices ended flat as gains owning to weak dollar index were capped due to weak demand.

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	NA	3623.03	2665.2	2712.42	1255.65
	IIP, %y/y	NA	4.90%	4.10%	5.20%	4.80%	NA	4.90%	4.10%	5.20%	4.80%
	Exports, $ billion	NA	43.56	38.92	36.61	36.56	NA	43.56	38.92	36.61	36.56
	Imports, $ billion	NA	71.94	59.59	63.71	71.24	NA	71.94	59.59	63.71	71.24
	Manufacturing PMI	55.00	54.70	53.90	56.9	55.4	55.00	54.70	53.90	56.9	55.4
	Services PMI	59.80	58.80	57.5	58.1	58.5	59.80	58.80	57.5	58.1	58.5
	GST collections (Rs crore)	194,184	242,702	200064	183609	193384	194,184	242,702	200064	183609	193384
	India crude oil import (mbpd)	NA	NA	19.00	19.43	21.09	NA	NA	19.00	19.43	21.09
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%