Daily Market Monitor

June 18, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	17 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24086	0.40	1.87	7.86	-3.09
BSE Sensex	77156	0.45	2.55	7.24	-5.43
BSE 100	25641	0.44	2.35	9.55	-1.59
BSE 200	11251	0.51	2.41	10.78	-0.41
BSE 500	36126	0.52	2.52	12.25	0.15
BSE SmallCap	55007	0.70	5.50	27.28	3.37
BSE MidCap	47415	0.78	3.08	16.97	3.42
BSE LargeCap	9481	0.45	2.27	9.87	-0.93
Sectoral indices					
BSE IT	28137	0.80	4.35	0.75	-27.21
BSE Oil & Gas	26788	0.05	-0.17	4.80	-1.66
BSE FMCG	18385	-0.20	-2.34	9.60	-8.53
BSE Auto	58970	-0.50	2.69	12.08	13.23
BSE Bankex	64906	0.56	7.30	14.71	3.24
BSE Teck	15020	0.96	3.10	1.98	-18.93
BSE Capital Goods	82329	2.76	7.16	28.15	17.31
BSE Consumer Durable	60988	1.39	4.86	15.91	6.35

Turnover (Rs Cr)	17 June	16 June
BSE Cash	10130	12762
NSE Cash	133369	119619
NSE F&O	6970562	55257547

Rs. Cr (Equity)	FII Inv 16 June	MF Inv 15 June	DII Inv 17 June
Buy	16,021	15,326	16,612
Sell	13,136	14,156	15,050
Net	2,885	1,170	1,561
Net (MTD)	-37,601	42,725	62,698
Net (YTD)	-282,219	287,946	439,483

	17 June	1Day	Month ago	Year ago
USD	94.38	94.70	95.93	86.10
GBP	126.60	126.91	128.09	116.85
Euro	109.54	109.70	111.63	99.59
100 Yen	58.89	59.11	60.54	59.47

Indian markets

- Indian equity benchmarks ended higher on Wednesday, as relatively softer crude oil prices along with foreign institutional investor inflows triggered hopes of recovery.
- The top gainers were Trent, Bharat Electronics, Hindalco Industries, SBI Life Insurance Company and Eternal, up 1.68% - 7.25%.
- The top losers were Tata Motors Passenger Vehicles, Cipla, Bajaj Finserv, Oil & Natural Gas Corporation and Axis Bank, down 1.01% - 8.10%.

Indian debt

- The interbank call-money rate ended lower at 5.30% on Wednesday compared to 5.35% on Tuesday.
- Government bond prices ended flat on Wednesday, as gains supported by steady oil prices and foreign fund inflows were offset due to caution ahead of the US Federal Reserve decision.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.88% on Wednesday.

Indian Rupee

- The spot rupee ended flat against the US dollar on Wednesday, with demand from importers erasing gains emanating from relatively eased crude oil prices. Meanwhile, investors shifted their focus to the US Federal Reserve's policy decision for further direction.

Regulatory

- The Reserve Bank of India injected Rs 72,300 crore via VRR auctions to ease liquidity after advance tax outflows sharply reduced surplus funds and pushed overnight rates above the repo rate.
- The Reserve Bank of India has eased interest rate rules for overseas deposits, enabling banks to offer better returns on FCNR(B) and NRE accounts.
- SEBI has warned investors against trading unlisted securities on unauthorised platforms, highlighting the absence of regulatory safeguards and dispute-resolution mechanisms, underscoring heightened risks in the grey market segment.

Economy and Government

- Prime Minister Narendra Modi said Rs 2,400 crore will be disbursed under the PM-VBRY employment incentive scheme on June 19 to boost formal job creation, support first-time workers, and incentivise hiring across sectors, reinforcing the government's employment-led growth agenda.

Domestic Debt Market Indicators

Instrument	17 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.30%	5.35%	5.23%	5.30%	7.00%	4.95%
3-Month T-Bill	5.25%	5.24%	5.42%	5.33%	5.40%	5.36%
6-Month T-Bill	5.49%	5.50%	5.57%	5.50%	5.51%	5.43%
1-year T-Bill	5.78%	5.80%	5.71%	5.60%	5.70%	5.49%
3-Month CD	6.60%	6.55%	6.95%	7.23%	7.35%	5.87%
6-Month CD	7.15%	7.18%	7.17%	7.28%	7.30%	6.15%
1-year CD	7.40%	7.40%	7.55%	7.12%	7.25%	6.34%
3-Month CP	7.05%	7.00%	7.68%	7.55%	7.75%	6.24%
6-Month CP	7.50%	7.60%	7.75%	7.65%	7.65%	6.52%
1-year CP	7.75%	7.80%	7.90%	7.50%	7.60%	6.70%
1-year Gilt	5.82%	5.86%	6.02%	5.75%	5.82%	5.60%
3-year Gilt	6.18%	6.17%	6.53%	6.12%	6.43%	5.84%
5-year Gilt	6.47%	6.47%	6.86%	6.46%	6.90%	5.99%
1-year AAA	7.53%	7.40%	7.71%	7.40%	7.57%	6.63%
3-year AAA	7.43%	7.38%	7.77%	7.40%	7.59%	6.75%
5-year AAA	7.48%	7.43%	7.83%	7.42%	7.67%	6.81%
10-year G-sec	6.88%	6.88%	7.06%	6.71%	7.02%	6.26%
Net LAF (Rs Cr)	23881	151131	248222	81964	245161	290203
Forex reserves ($ bn)	681.61	682.32	696.99	716.81	642.49	696.66

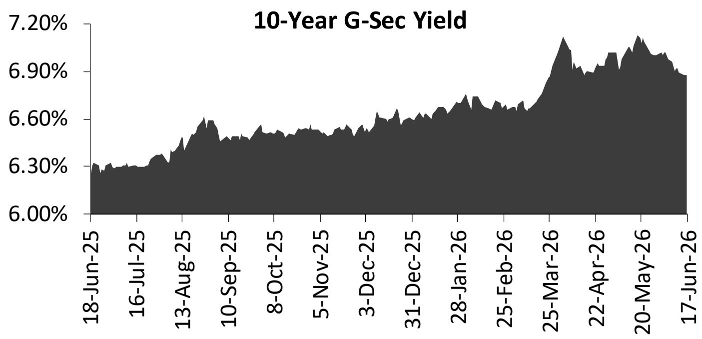
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.49	7.47	8.19	8.27	9.50	9.98
1 Year	5.82	7.53	8.25	8.33	9.56	10.04
3 Year	6.18	7.43	8.15	8.23	9.46	9.94
5 Year	6.47	7.48	8.30	8.38	9.61	10.09
10 Year	6.88	7.56	8.38	8.46	9.69	10.17

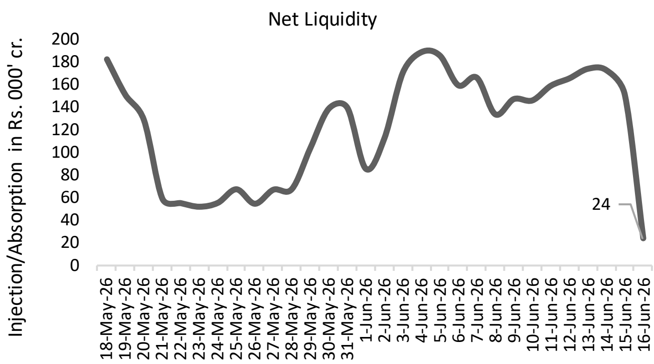
Rs. Cr (Debt)	FII Inv 16 June	MF Inv 15 June
Buy	2,936	21,093
Sell	662	25,074
Net	2,274	-3,981
Net (MTD)	7,622	-74,017
Net (YTD)	4,509	-460,026

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

- Puravankara has entered a joint development/land deal to expand its North Bengaluru residential pipeline, with the project's estimated gross development value (GDV) reported at Rs 1,100 crore (11.23 acres).
- DS Group partnered Marriott to build a Rs 400 crore, 200-room W Hotel in Delhi Aerocity by September 2027, as part of a Rs 1,000 crore plan to add up to 12 hotels by FY29.
- Warner Music India partnered SVF Entertainment to expand into the Bengali music segment, strengthening its regional content strategy and global distribution pipeline.
- Axis Bank has partnered with BITS Pilani to invest Rs 100 crore in a research and innovation park in Hyderabad, strengthening its push into deep-tech, healthcare innovation, and industry–academia collaboration.
- Harmony Infra Ventures plans invest Rs 800 crore in a Delhi-NCR luxury housing project (264 units), signaling continued strength in premium residential demand.





Global market indices	17 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51492.55	-0.98	3.97	11.12	21.97
Nikkei 225	69902.25	0.72	13.83	36.89	81.39
FTSE	10508.61	0.14	3.07	3.26	18.96
Hang Seng	24312.16	-0.74	-6.36	-1.92	1.38
Taiwan	45877.39	0.15	11.43	44.62	106.55

Global debt	17 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.49	4.43	4.59	4.20	4.30	4.39
UK 10-Year (%)	4.75	4.78	5.18	4.67	4.88	4.54
German 10-Year (%)	2.93	2.94	3.15	2.90	3.01	2.53
Japan 10-Year (%)	2.60	2.64	2.71	2.26	2.35	1.47

Domestic	17 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	150148	-0.34	-5.10	2.33	51.44
Silver (Rs / Kg)	247688	-0.60	-7.75	7.63	127.03
Aluminium (Rs / Kg)	363	0.14	-5.10	2.12	48.40
Copper (Rs / kg)	1348	-0.09	0.22	15.13	52.92
Lead (Rs / kg)	208	-0.22	1.12	5.35	10.48
Zinc (Rs /Kg)	373	0.96	1.45	15.66	46.41
Nickel (Rs / kg)	1721	0.47	-5.19	5.14	31.34

Global	17 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4334.60	0.11	-7.33	-4.27	27.58
Silver (oz/$)	6993.00	-0.29	-17.47	-0.77	92.17
Brent ($/bbl)	79.55	0.75	-27.19	-32.78	4.05
NYMEX crude ($/bbl)	76.79	0.97	-27.16	-24.26	2.61

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 lower on Wednesday as signals from the Federal Reserve pointing toward tighter monetary policy, including expectations of future rate hikes and the removal of rate guidance.
- 10yr yield ended higher at 4.49% after policy makers at Federal Reserve signaled the possibility of a rate hike later this year.
- FTSE index closed higher on Wednesday, driven by gains in mining stocks, while investors remained cautious ahead of key interest rate decisions from the Bank of England and the Federal Reserve.
- Asian markets were trading mostly higher at 8.30 AM.
- The Federal Reserve held interest rates at 3.50%-3.75% for a fourth meeting under the new Chair Kevin Warsh. Projections were split, with officials evenly divided between hikes and no change or cuts. Growth for 2026 was trimmed to 2.2%, while inflation forecasts were raised to 3.6%. The economy remained resilient, but inflation stayed above target amid geopolitical uncertainty.
- US retail sales rose by 6.9% year-over-year in May 2026, compared to 4.8% increase in April 2026.
- US Pending Home Sales increased 4.8% year-on-year in May 2026, following a 3.2% rise in April.

Commodity

- Crude oil prices rose marginally by 74 cents to $76.79 a barrel on the NYMEX after comments from the US President raised fears of renewed conflict.
- Domestic gold prices ended lower due to strong dollar index.

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%