Daily Market Monitor

June 25, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	24 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24022	0.83	1.27	7.57	-4.08
BSE Sensex	76991	1.04	2.09	7.01	-6.17
BSE 100	25583	0.76	1.69	9.30	-2.47
BSE 200	11233	0.60	1.67	10.60	-1.14
BSE 500	36152	0.53	2.08	12.33	-0.28
BSE SmallCap	55870	0.17	6.62	29.27	5.31
BSE MidCap	47741	0.23	2.43	17.77	4.20
BSE LargeCap	9459	0.64	1.62	9.61	-1.86
Sectoral indices					
BSE IT	26887	1.81	-4.20	-3.72	-28.44
BSE Oil & Gas	26654	0.78	-1.73	4.28	-1.60
BSE FMCG	18252	0.06	-1.61	8.81	-8.60
BSE Auto	58330	-0.25	1.81	10.86	10.49
BSE Bankex	65581	1.78	7.68	15.91	3.06
BSE Teck	14530	0.68	-2.98	-1.34	-20.83
BSE Capital Goods	81469	-1.87	4.02	26.81	14.60
BSE Consumer Durable	59822	0.37	3.39	13.69	2.96

Turnover (Rs Cr)	24 June	23 June
BSE Cash	11802	9984
NSE Cash	122776	131784
NSE F&O	10705298	70906079

Rs. Cr (Equity)	FII Inv 23 June	MF Inv 22 June	DII Inv 24 June
Buy	15,986	13,914	17,274
Sell	15,695	12,700	13,637
Net	291	1,214	3,637
Net (MTD)	-32,371	46,050	70,409
Net (YTD)	-276,989	291,271	447,193

	24 June	1Day	Month ago	Year ago
USD	94.70	94.71	95.96	86.10
GBP	124.93	125.39	128.79	117.00
Euro	107.63	108.20	111.39	100.03
100 Yen	58.57	58.58	60.31	59.33

Indian markets

- Indian equity benchmarks closed Wednesday with a gain, supported by gains in banking, financials and IT stocks. Market sentiment got a further boost following easing concerns over RBI rate hike.
- The top gainers were InterGlobe Aviation, Trent, Adani Enterprises, Tech Mahindra and Bajaj Finance—up 2.87-4.77%.
- The top losers were Bajaj Auto, NTPC, Maruti Suzuki India, Tata Steel and Oil & Natural Gas Corporation—down 1.74-2.69%.

Indian debt

- The interbank call-money rate ended higher at 5.35% on Wednesday compared to 4.85% on Tuesday.
- Government bond prices ended higher on Wednesday, as concerns over RBI rate hikes eased to some extent, with lower crude oil prices further supporting sentiment.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.81% on Wednesday compared to 6.87% on Tuesday.

Indian Rupee

- The rupee ended higher against the US dollar in the spot market on Wednesday due to the likely intervention of the central bank.

Regulatory

- RBI Governor stated that most requirements for India's inclusion in global bond indices are in place, which could boost foreign investment inflows into debt markets.
- SEBI has proposed guidelines for celebrity endorsements and a common advertising code to improve transparency in financial promotions.
- NITI Aayog has proposed a model pharma chapter for future FTAs, aiming to strengthen India's pharmaceutical trade framework.

Economy and Government

- S&P estimates India's GDP growth could slow to 6.6% in FY27 due to energy stress and weak monsoon risks, indicating potential macro headwinds.
- The Ministry of Statistics and Programme Implementation (MoSPI) is planning to launch India's first Index of Services Production (ISP) on July 14, enhancing measurement of the services sector and improving economic data tracking.
- MoSPI has released a discussion paper to develop methodologies for coal-related monetary asset accounting, aiming to improve data quality and economic measurement.
- India and South Korea are working to deepen strategic ties, enhancing cooperation across key sectors.
- The government has enabled Aadhaar-based e-KYC for post office savings schemes, allowing deposits up to Rs 50,000 and withdrawals up to Rs 20,000, enhancing ease of access.
- The Uttar Pradesh government has initiated a crackdown on illegal coaching centres, improving regulatory oversight.
- Finance Ministry and NFRA officials briefed a Parliamentary panel on the Corporate Laws Amendment Bill, focusing on strengthening governance, audit quality, and regulatory framework for corporates.

Domestic Debt Market Indicators

Instrument	24 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	4.85%	5.37%	4.80%	7.00%	5.30%
3-Month T-Bill	5.27%	5.25%	5.54%	5.37%	5.40%	5.33%
6-Month T-Bill	5.45%	5.42%	5.82%	5.50%	5.51%	5.41%
1-year T-Bill	5.63%	5.76%	5.93%	5.65%	5.70%	5.47%
3-Month CD	6.65%	6.60%	7.40%	7.50%	7.35%	5.84%
6-Month CD	7.05%	7.09%	7.75%	7.45%	7.30%	6.10%
1-year CD	7.35%	7.40%	7.95%	7.35%	7.25%	6.33%
3-Month CP	6.90%	6.95%	8.05%	7.75%	7.75%	6.23%
6-Month CP	7.40%	7.45%	8.15%	7.78%	7.65%	6.54%
1-year CP	7.65%	7.70%	8.30%	7.70%	7.60%	6.76%
1-year Gilt	5.68%	5.73%	6.25%	5.88%	5.82%	5.54%
3-year Gilt	6.20%	6.23%	6.69%	6.25%	6.43%	5.84%
5-year Gilt	6.42%	6.48%	6.93%	6.66%	6.90%	5.99%
1-year AAA	7.52%	7.56%	8.02%	7.45%	7.57%	6.52%
3-year AAA	7.34%	7.37%	7.94%	7.54%	7.59%	6.60%
5-year AAA	7.44%	7.44%	7.93%	7.59%	7.67%	6.70%
10-year G-sec	6.81%	6.86%	7.09%	6.86%	7.02%	6.26%
Net LAF (Rs Cr)	-14824	-19972	54977	61629	245161	259049
Forex reserves ($ bn)	671.63	681.61	688.89	709.76	642.49	698.95

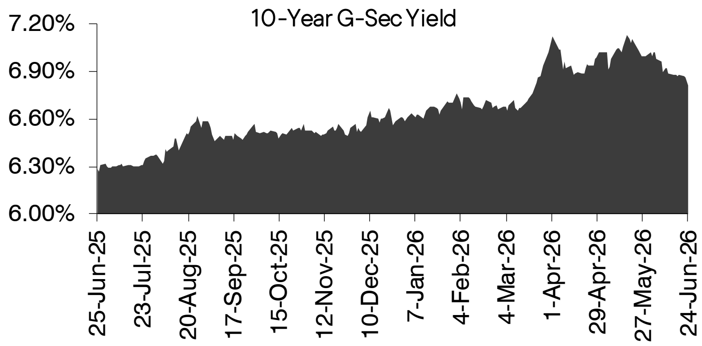
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.45	7.32	8.04	8.12	9.35	9.83
1 Year	5.68	7.52	8.24	8.32	9.55	10.03
3 Year	6.20	7.34	8.06	8.14	9.37	9.85
5 Year	6.42	7.44	8.26	8.34	9.57	10.05
10 Year	6.81	7.51	8.33	8.41	9.64	10.12

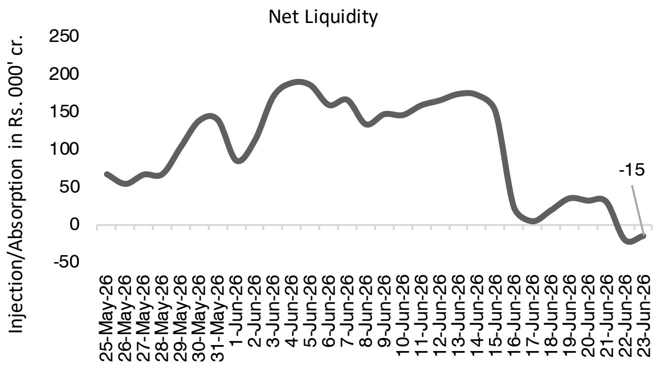
Rs. Cr (Debt)	FII Inv 23 June	MF Inv 22 June
Buy	1,061	18,094
Sell	553	20,343
Net	508	-2,249
Net (MTD)	17,159	-87,212
Net (YTD)	14,045	-473,221

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	54.5 (June-26)	53.9 (Mar-26)	58.4 (June-25)
India Service PMI	57.3 (June-26)	57.5 (Mar-26)	60.4 (June-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

- Axis Bank raised $800 million through dual-tranche dollar bonds, strengthening its capital base and funding profile.
- Godrej Industries has approved the allotment of Rs 1,000 crore worth of non-convertible debentures (NCDs), supporting its funding and capital requirements.
- SaffronStays raised $3.5 million in funding to expand its holiday home platform and strengthen its presence in India's alternative accommodation market.
- ONE Atmosphere plans to invest Rs 500 crore to expand its luxury serviced apartments business, targeting 7,500 keys globally over five years, strengthening its hospitality footprint.
- Embassy Developments inked an MoU with the Government of Uttar Pradesh for a proposed large-scale commercial development in Lucknow, involving an investment of around Rs 1,500 crore.
- Adani Power plans to invest over Rs 2 trillion over five years to scale capacity to 45 GW, strengthening its power generation footprint.
- Adani Group is venturing into nuclear power, aiming for 10 GW capacity by 2035 to bolster India's energy security amidst global uncertainties.
- EMA Partners India acquired RPO firm Taggd for Rs 113 crore in an all-cash deal, expanding its HR and recruitment services portfolio.





TATA mutual fund

Global market indices	24 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51848.9	0.35	2.51	11.88	20.33
Nikkei 225	69174.97	-0.88	9.21	35.47	78.33
FTSE	10461.63	0.31	-0.04	2.80	19.44
Hang Seng	23412.18	0.33	-8.57	-5.55	-3.16
Taiwan	46043.6	-2.24	8.93	45.14	107.51

Global debt	24 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.41	4.50	4.56	4.39	4.30	4.30
UK 10-Year (%)	4.69	4.76	4.91	4.98	4.88	4.47
German 10-Year (%)	2.87	2.92	3.03	3.01	3.01	2.53
Japan 10-Year (%)	2.67	2.67	2.76	2.26	2.35	1.42

Domestic	24 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	142178	-1.94	-10.08	-3.10	46.18
Silver (Rs / Kg)	222035	-2.39	-16.53	-3.52	109.53
Aluminium (Rs / Kg)	340	-2.94	-12.69	-4.32	36.68
Copper (Rs / kg)	1295	-0.71	-5.46	10.56	46.33
Lead (Rs / kg)	207	-0.17	-3.18	5.10	12.09
Zinc (Rs /Kg)	361	-1.65	-3.55	11.90	39.84
Nickel (Rs / kg)	1641	-3.27	-9.40	0.24	24.99

Global	24 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4131.42	-1.26	-9.02	-8.75	22.25
Silver (oz/$)	6198.00	-5.30	-18.82	-12.05	71.03
Brent ($/bbl)	73.74	-4.33	-28.78	-37.69	9.83
NYMEX crude ($/bbl)	70.34	-3.92	-27.18	-30.62	9.27

Upcoming market indicators

Date	Indicator	Previous
June 25	US GDP Growth Rate QoQ Final Q1	0.5%
June 28	India Bank Loan Growth, Jun/12	17.7%
June 29	Eurozone Consumer Inflation Expectations, Jun	40.5
June 30	Japan Industrial Production YoY Prel, May	2.0%
July 1	Eurozone Inflation Rate YoY Flash, Jun	3.2%

Global markets

- Wall Street stocks closed mixed on Wednesday with Dow Jones rising on gains in airline and travel stocks as falling oil prices improved the cost outlook, while Nasdaq declined due to weakness in technology stocks amid valuation concerns.
- 10-year US bond yield ended lower at 4.50% as sharp fall in crude oil prices eased inflation pressure.
- FTSE index closed higher on Wednesday supported by gains in real estate stocks.
- Asian markets were trading mostly higher at 8.30 AM.
- US current account deficit widened to a seasonally adjusted $226.8 billion in the first quarter of 2026 compared to a revised $221.1 billion in the last quarter of 2025.
- US building permits decreased 0.9% in May 2026 compared to a 4.4% rise in April 2026.

Commodity

- Crude oil prices fell by $2.87 to $70.34 a barrel on NYMEX, as increased crude flows through the Strait of Hormuz eased supply concerns.
- Domestic gold prices fell, weighed by sharp gain in US dollar.

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%