Daily Market Monitor

June 29, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	25 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24056	0.14	0.10	7.72	-4.71
BSE Sensex	77100	0.14	0.80	7.16	-6.83
BSE 100	25618	0.14	0.52	9.45	-3.06
BSE 200	11237	0.04	0.46	10.65	-1.79
BSE 500	36133	-0.05	0.79	12.28	-1.13
BSE SmallCap	55587	-0.51	4.69	28.62	3.14
BSE MidCap	47469	-0.57	1.01	17.10	2.96
BSE LargeCap	9470	0.12	0.42	9.74	-2.47
Sectoral indices					
BSE IT	26651	-0.88	-5.26	-4.57	-30.24
BSE Oil & Gas	26310	-1.29	-4.45	2.94	-2.84
BSE FMCG	18342	0.50	-1.06	9.35	-8.93
BSE Auto	59667	2.29	2.35	13.41	11.90
BSE Bankex	65600	0.03	5.31	15.94	2.98
BSE Teck	14367	-1.13	-4.32	-2.45	-23.03
BSE Capital Goods	80938	-0.65	2.85	25.99	14.48
BSE Consumer Durable	59369	-0.76	1.50	12.83	0.91

Turnover (Rs Cr)	25 June	24 June
BSE Cash	11943	11802
NSE Cash	136052	122776
NSE F&O	11176662	10705298

Rs. Cr (Equity)	FII Inv 24 June	MF Inv 23 June	DII Inv 25 June
Buy	19,686	12,655	24,844
Sell	18,388	13,410	19,096
Net	1,298	-754	5,748
Net (MTD)	-31,073	45,295	76,156
Net (YTD)	-275,691	290,516	452,941

	25 June	1Day	Month ago	Year ago
USD	94.48	94.70	95.20	85.87
GBP	124.50	124.93	128.35	117.01
Euro	107.36	107.63	110.82	99.76
100 Yen	58.38	58.57	59.91	59.16

Indian markets

- Indian equity benchmark indices ended higher on Thursday on account of relatively easing crude oil prices and a strengthening rupee.
- The top gainers were InterGlobe Aviation, Mahindra & Mahindra, Maruti Suzuki India, Max Healthcare Institute and Tata Consumer Products, which rose 3.04-4.89%.
- The top losers were Oil & Natural Gas Corporation, Hindalco Industries, Power Grid Corporation of India, Tech Mahindra and Bharti Airtel, falling 1.46-2.85%.

Indian debt

- The interbank call-money rate ended higher at 5.40% on Thursday compared to 5.35% on Wednesday.
- Government bond prices ended higher on Thursday due to easing oil-led inflation worries.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.79% on Thursday compared to 6.80% on Wednesday.

Indian Rupee

- The spot rupee ended higher against the US dollar on Thursday, supported by foreign fund inflows.

Regulatory

- The Reserve Bank of India (RBI) extended its pilot Benchmark Issuance Strategy (BIS) for state government securities to 10 more jurisdictions, including nine states and the Union Territory of Delhi. It indicates that states and UTs are expected to raise Rs 3.19 lakh cr through market borrowings during the July-September quarter of the current financial year.
- The Reserve Bank of India (RBI) proposed a series of measures aimed at improving liquidity and participation in the term money market, while also seeking to streamline rules governing secondary market transactions in government securities.

Economy and Government

- India's foreign exchange reserves rose by $963 million to reach $672.59 billion for the week ended June 19, driven by an increase in gold reserves, as per data released by the Reserve Bank of India (RBI).
- India and Seychelles have concluded the umbrella line of credit agreement worth Rs 1250 cr, to be extended to the African island nation for supporting its developmental projects.

Domestic Debt Market Indicators

Instrument	25 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.40%	5.35%	5.35%	5.40%	7.00%	5.30%
3-Month T-Bill	5.26%	5.27%	5.54%	5.35%	5.40%	5.39%
6-Month T-Bill	5.41%	5.45%	5.82%	5.45%	5.51%	5.50%
1-year T-Bill	5.60%	5.63%	5.87%	5.63%	5.70%	5.55%
3-Month CD	6.55%	6.65%	7.50%	7.59%	7.35%	5.87%
6-Month CD	6.95%	7.05%	7.80%	7.45%	7.30%	6.15%
1-year CD	7.20%	7.35%	7.95%	7.35%	7.25%	6.35%
3-Month CP	6.85%	6.90%	8.05%	7.89%	7.75%	6.23%
6-Month CP	7.32%	7.40%	8.20%	7.78%	7.65%	6.55%
1-year CP	7.52%	7.65%	8.33%	7.70%	7.60%	6.78%
1-year Gilt	5.69%	5.68%	6.18%	5.83%	5.82%	5.62%
3-year Gilt	6.20%	6.20%	6.56%	6.30%	6.43%	5.88%
5-year Gilt	6.42%	6.42%	6.85%	6.70%	6.90%	6.03%
1-year AAA	7.36%	7.52%	7.98%	7.47%	7.57%	6.58%
3-year AAA	7.30%	7.34%	7.89%	7.54%	7.59%	6.61%
5-year AAA	7.35%	7.44%	7.88%	7.62%	7.67%	6.72%
10-year G-sec	6.79%	6.81%	7.03%	6.87%	7.02%	6.28%
Net LAF (Rs Cr)	-10312	-14824	67285	61629	245161	247550
Forex reserves ($ bn)	672.59	671.63	688.89	709.76	642.49	698.95

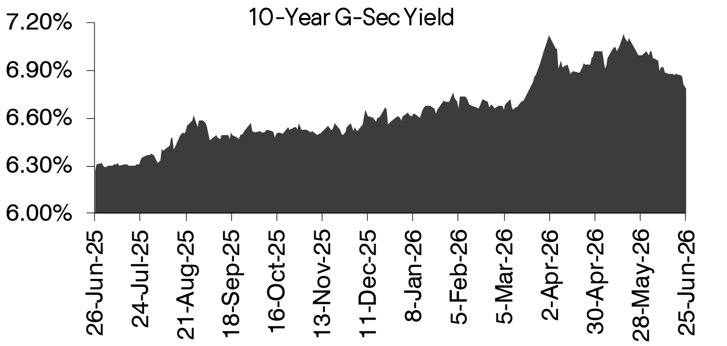
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.41	7.22	7.94	8.02	9.25	9.73
1 Year	5.69	7.36	8.08	8.16	9.39	9.87
3 Year	6.20	7.30	8.02	8.10	9.33	9.81
5 Year	6.42	7.35	8.17	8.25	9.48	9.96
10 Year	6.79	7.44	8.26	8.34	9.57	10.05

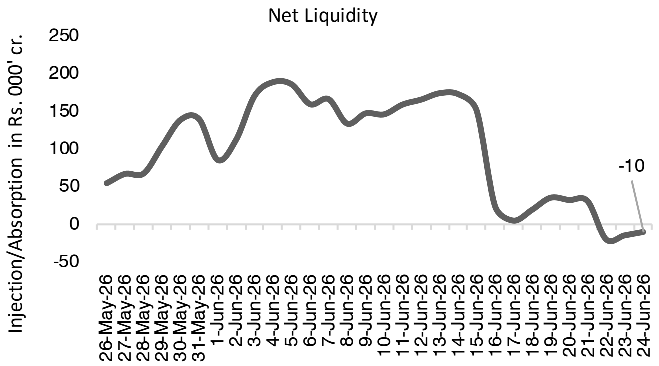
Rs. Cr (Debt)	FII Inv 24 June	MF Inv 23 June
Buy	8,251	23,383
Sell	142	20,985
Net	8,109	2,398
Net (MTD)	25,267	-84,814
Net (YTD)	22,154	-470,823

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

- JSW Infrastructure closed its Qualified Institutions Placement (QIP) issue on June 25, raising Rs 7,502.69 crore by issuing 26.32 crore shares at a price of Rs 285 per share
- PTC Industries received board's approval for raising up to Rs 1,800 crore through a Qualified Institutions Placement (QIP), preferential issue, or other modes.
- IIFL Finance received board's approval for raising up to Rs 10,000 crore through the issuance of equity shares or other securities. It has also approved an increase in the company's borrowing limit from Rs 60,000 crore to Rs 75,000 crore.
- BEML has received an additional export order worth approximately $5.35 million from the Middle East for the supply of heavy earth-moving equipment for infrastructure development applications.
- Ashoka Buildcon received a Letter of Acceptance (LoA) for a project worth $35.42 million from the Central Housing and Planning Authority, Guyana.





Global market indices	26 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	51876.11	-0.09	2.80	11.94	19.57
Nikkei 225	69360.88	-4.15	6.72	35.83	75.22
FTSE	10508.02	-0.21	0.16	3.26	20.29
Hang Seng	22671.86	-1.76	-11.44	-8.54	-6.80
Taiwan	44571.76	-3.64	2.40	40.50	98.16

Global debt	26 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.38	4.40	4.50	4.42	4.30	4.26
UK 10-Year (%)	4.74	4.71	4.87	4.99	4.88	4.47
German 10-Year (%)	2.85	2.86	2.98	3.06	3.01	2.56
Japan 10-Year (%)	2.60	2.63	2.72	2.28	2.35	1.42

Domestic	25 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	139873	-1.62	-11.95	-4.68	43.97
Silver (Rs / Kg)	216541	-2.47	-20.13	-5.91	105.84
Aluminium (Rs / Kg)	332	-2.35	-14.37	-6.57	34.20
Copper (Rs / kg)	1292	-0.21	-5.22	10.33	45.43
Lead (Rs / kg)	208	0.24	-1.00	5.35	13.62
Zinc (Rs /Kg)	361	-0.15	-4.43	11.73	39.81
Nickel (Rs / kg)	1625	-0.98	-10.91	-0.74	24.24

Global	26 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4032.47	1.05	-11.79	-10.94	21.05
Silver (oz/$)	5833.00	0.57	-25.43	-17.23	61.09
Brent ($/bbl)	71.99	-4.34	-27.71	-39.17	6.29
NYMEX crude ($/bbl)	69.23	-3.74	-26.26	-31.71	6.12

Upcoming market indicators

Date	Indicator	Previous
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%
July 2	US Non Farm Payrolls, June	172K

Global markets

- Wall Street stocks ended lower on Friday due to drop in AI-related chip stocks.
- 10-year US yield ended lower at 4.40% as Minneapolis Federal Reserve President Neel Kashkari said he has changed his outlook and now expects that one interest rate increase will be necessary this year.
- FTSE index declined on Friday weighed by selloff in energy, banking stocks and uncertainty around AI-related shares.
- Asian markets were trading mostly lower at 8.30 AM.
- US Michigan 1-Year Inflation Expectations eased to 4.6% in June 2026, compared to 4.8% in May 2026.
- China's current account surplus stood at $184.3 billion in the first quarter of 2026, compared to $243.8 billion in the previous quarter.
- China's industrial profits surged 18.8% year-on-year to CNY 3.14 trillion in the January-May 2026 period, accelerating from a 18.2% gain in the first four months of the year.

Commodity

- Crude oil prices rose by $1.58 to $71.92 a barrel on NYMEX, as an attack on a cargo vessel near the Strait of Hormuz disrupted evacuation efforts and reignited supply concerns.
- Domestic gold declined 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*

TATA mutual fund

	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

	Indicators	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25
	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

	Indicators	May-26	Apr-26	Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25
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%