Daily Market Monitor

June 30, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	29 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23946	-0.46	1.69	7.23	-6.60
BSE Sensex	76728	-0.48	2.61	6.64	-8.72
BSE 100	25471	-0.58	1.64	8.82	-5.10
BSE 200	11176	-0.54	1.27	10.04	-3.77
BSE 500	35961	-0.48	1.53	11.74	-2.97
BSE SmallCap	55404	-0.33	4.57	28.20	2.13
BSE MidCap	47265	-0.43	0.86	16.60	1.55
BSE LargeCap	9423	-0.50	-9.16	9.19	-4.49
Sectoral indices					
BSE IT	26373	-1.04	-6.36	-5.56	-30.71
BSE Oil & Gas	25940	-1.40	-2.99	1.49	-7.09
BSE FMCG	18264	-0.43	0.00	8.88	-10.00
BSE Auto	58409	-2.11	0.73	11.01	8.65
BSE Bankex	65198	-0.61	6.65	15.23	0.99
BSE Teck	14268	-0.69	-4.23	-3.12	-23.91
BSE Capital Goods	80969	0.04	0.19	26.04	13.17
BSE Consumer Durable	59053	-0.53	2.37	12.23	-0.81

Turnover (Rs Cr)	29 June	25 June
BSE Cash	10048	11943
NSE Cash	183492	136052
NSE F&O	27697240	11176662

Rs. Cr (Equity)	FII Inv 25 June	MF Inv 24 June	DII Inv 29 June
Buy	19,961	13,284	55,274
Sell	18,395	10,971	52,472
Net	1,566	2,313	2,801
Net (MTD)	-29,507	47,608	78,958
Net (YTD)	-274,124	292,830	455,742

	29 June	1Day	Month ago	Year ago
USD	94.35	94.48	95.38	85.56
GBP	124.75	124.50	128.18	117.55
Euro	107.60	107.36	111.11	100.20
100 Yen	58.31	58.38	59.89	59.30

Indian markets

- Indian equity benchmark indices ended lower on Monday due to profit booking following renewed uncertainty over the West Asia conflict.
- The top losers were Kotak Mahindra Bank, Mahindra & Mahindra, Adani Enterprises, Tata Motors Passenger Vehicles and InterGlobe Aviation, falling 2.07- 2.93%.
- The top gainers were Max Healthcare Institute, Dr. Reddy's Laboratories, Coal India, Eternal and Bharat Electronics, rising 1.55-2.37%.

Indian debt

- The interbank call-money rate ended lower at 5.35% on Monday compared to 5.40% on Thursday.
- Government bond prices ended higher on Monday as crude oil prices eased to pre-war levels.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.77% on Monday compared to 6.79% on Thursday.

Indian Rupee

- The spot rupee ended lower against the US dollar on Monday, tracking weakness in the domestic equity market and increased demand for the greenback from foreign banks.

Regulatory

- As per RBI data India’s external debt rose by $26.3 billion to $762.8 billion as of March 2026, with the external debt-to-GDP ratio increasing to 20.8% from 19.8% a year earlier, reflecting higher external borrowing.

Economy and Government

- India Industrial Production expanded by 5.1% in May of 2026, compared to 4.9% in April 2026.
- Moody’s stated that a wider fiscal deficit is unlikely to threaten India’s sovereign rating, reflecting confidence in macroeconomic stability.
- The government is planning a Rs 5,000 crore scheme to promote green technologies in the steel sector, supporting decarbonization and sustainable manufacturing.
- The government has ended temporary restrictions on bulk petrol and diesel purchases at retail pumps from July 1, indicating normalization of fuel supply conditions.

Domestic Debt Market Indicators

Instrument	29 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.35%	5.40%	5.55%	5.50%	7.00%	5.05%
3-Month T-Bill	5.28%	5.26%	5.53%	5.45%	5.40%	5.40%
6-Month T-Bill	5.41%	5.41%	5.70%	5.51%	5.51%	5.53%
1-year T-Bill	5.60%	5.60%	5.98%	5.65%	5.70%	5.53%
3-Month CD	6.60%	6.55%	7.21%	7.55%	7.35%	5.92%
6-Month CD	6.88%	6.95%	7.70%	7.45%	7.30%	6.13%
1-year CD	7.05%	7.20%	7.90%	7.25%	7.25%	6.33%
3-Month CP	7.02%	6.85%	8.00%	7.90%	7.75%	6.30%
6-Month CP	7.25%	7.32%	8.13%	7.85%	7.65%	6.54%
1-year CP	7.45%	7.52%	8.35%	7.62%	7.60%	6.78%
1-year Gilt	5.69%	5.69%	6.06%	5.79%	5.82%	5.62%
3-year Gilt	6.20%	6.20%	6.52%	6.39%	6.43%	5.93%
5-year Gilt	6.43%	6.42%	6.82%	6.76%	6.90%	6.03%
1-year AAA	7.36%	7.36%	7.95%	7.52%	7.57%	6.58%
3-year AAA	7.28%	7.30%	7.84%	7.59%	7.59%	6.60%
5-year AAA	7.34%	7.35%	7.84%	7.67%	7.67%	6.72%
10-year G-sec	6.77%	6.79%	7.00%	6.94%	7.02%	6.31%
Net LAF (Rs Cr)	-41563	-10312	103837	114351	245161	300783
Forex reserves ($ bn)	672.59	671.63	681.38	698.35	642.49	697.94

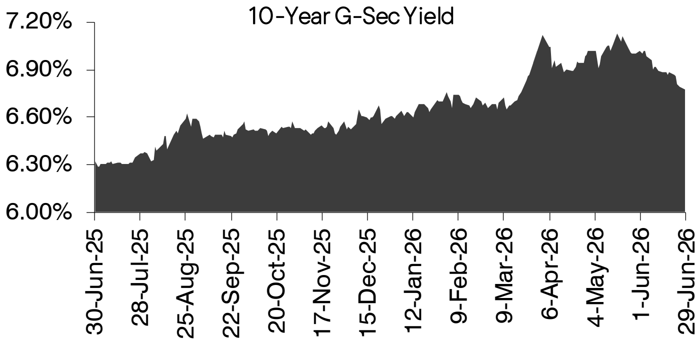
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.41	7.15	7.87	7.95	9.18	9.66
1 Year	5.69	7.36	8.08	8.16	9.39	9.87
3 Year	6.20	7.28	8.00	8.08	9.31	9.79
5 Year	6.43	7.34	8.16	8.24	9.47	9.95
10 Year	6.77	7.43	8.25	8.33	9.56	10.04

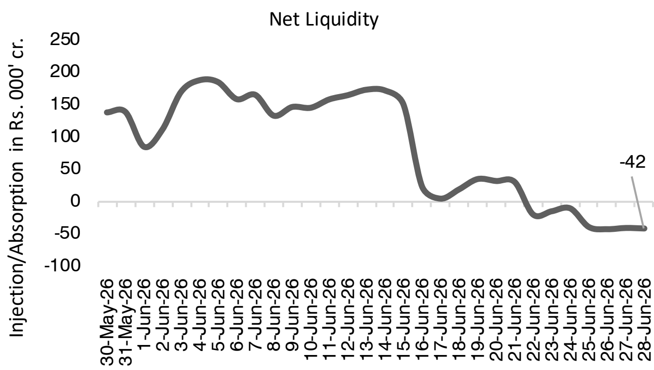
Rs. Cr (Debt)	FII Inv 25 June	MF Inv 24 June
Buy	4,268	22,390
Sell	589	23,773
Net	3,679	-1,382
Net (MTD)	28,946	-86,196
Net (YTD)	25,832	-472,206

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

- India Infrastructure Finance Company (IIFCL) plans to raise a $1 billion foreign-currency loan from overseas investors, potentially its largest.
- Yes Bank received board's approval for raising up to Rs 7,500 crore through the issuance of equity securities and up to Rs 8,500 crore through the issuance of debt securities
- OYO's parent company (Oravel Stays/Prism) has filed draft papers for a Rs 6,650 crore IPO (fresh issue), aiming to strengthen its balance sheet, fund expansion, and enhance market presence.
- Eswari Global Metal Industries filed IPO papers to raise Rs 1,100–1,300 crore, indicating continued activity in the primary market and fundraising momentum.
- State Bank of India raised $300 million through 3-year dollar bonds priced at SOFR + 100 bps, strengthening its foreign currency funding and global investor base.
- SIS received board's approval to undertake a share buyback of up to Rs 120 crore
- Serentica Renewables plans to invest Rs 1 trillion in renewable energy projects in Rajasthan, significantly scaling green capacity and supporting India's clean energy transition.
- Omaxe Limited plans to invest about Rs 6,200 crore over the next 4–5 years to launch a dedicated hospitality arm building 19 hotels across five states.
- Oberoi Realty plans to invest Rs 6,000 crore to develop its first housing project in Delhi-NCR, expanding its presence in the northern real estate market.





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Global market indices	29 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52182.74	0.59	2.25	12.60	19.09
Nikkei 225	69468.11	0.15	4.73	36.04	73.02
FTSE	10484.22	-0.23	0.72	3.02	19.15
Hang Seng	23026.68	1.57	-8.56	-7.11	-5.18
Taiwan	44999.9	0.96	0.60	41.85	99.29

Global debt	29 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.38	4.38	4.45	4.44	4.30	4.29
UK 10-Year (%)	4.73	4.74	4.81	4.98	4.88	4.50
German 10-Year (%)	2.86	2.85	2.93	3.10	3.01	2.60
Japan 10-Year (%)	2.64	2.60	2.66	2.38	2.35	1.43

Domestic	29 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141421	1.11	-9.61	-3.62	47.65
Silver (Rs / Kg)	219980	1.59	-16.47	-4.41	109.12
Aluminium (Rs / Kg)	335	0.92	-13.58	-5.71	35.13
Copper (Rs / kg)	1275	-1.30	-5.97	8.90	42.54
Lead (Rs / kg)	205	-1.37	-2.29	3.91	10.02
Zinc (Rs /Kg)	362	0.46	-2.67	12.24	38.34
Nickel (Rs / kg)	1618	-0.38	-11.67	-1.12	21.85

Global	29 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4080.72	1.20	-9.36	-9.87	22.42
Silver (oz/$)	5897.00	1.10	-22.07	-16.32	60.68
Brent ($/bbl)	73.15	1.61	-19.72	-38.19	7.94
NYMEX crude ($/bbl)	70.75	2.20	-19.01	-30.21	7.98

Upcoming market indicators

Date	Indicator	Previous
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
July 3	Eurozone PPI, May	4.9%
July 4	UK Halifax House Price Index, June	0.5%

Global markets

- Wall Street stocks closed higher on Monday supported by strong gains in technology stocks.
- 10-year US bond yield ended flat at 4.26% amid uncertainty around geopolitical tensions.
- FTSE index closed lower on Monday dragged down by losses in miners and financial stocks amid renewed Middle East hostilities.
- Asian markets were trading mostly higher at 8.30 AM.
- US Dallas Fed Manufacturing Index was flat at 0 in June 2026, compared to a 0.4 increase in May 2026.
- Eurozone Economic Sentiment Indicator rose to 95.0 in June 2026 compared to 93.7 in May 2026 while the industrial confidence indicator eased to -7.7 from -7.9 and the services sentiment edged up to 3.2 from 2.6.
- Eurozone Consumer Confidence edged down to 17.7 in June 2026, compared to a decline of 19 in May 2026.
- China NBS General PMI inched up to 50.6 in June 2026 compared to 50.5 in May 2026.
- China official NBS Manufacturing PMI increased to 50.3 in June 2026 compared to 50.0 in May 2026 while the official NBS Non-Manufacturing PMI rose to 50.2 from 50.1.
- Japan Industrial Production decreased 1.7% in May 2026 compared to a 2% rise in April 2026.
- Japan Retail sales increased 5.3% in May 2026, compared to an upwardly revised 2.8% rise in April 2026.

Commodity

- Crude oil prices rose by $1.52 to $70.75 a barrel on the NYMEX as renewed US-Iran attacks highlighted the fragility of the interim peace deal.
- Domestic gold prices rose 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%

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