Daily Market Monitor

July 01, 2026

TATA mutual fund

Domestic Market Performance

Indian market indices	30 June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23866	-0.34	1.35	6.87	-6.47
BSE Sensex	76479	-0.33	2.28	6.30	-8.53
BSE 100	25419	-0.20	1.44	8.60	-5.02
BSE 200	11166	-0.09	1.18	9.94	-3.68
BSE 500	35959	-0.01	1.53	11.73	-2.93
BSE SmallCap	55794	0.70	5.31	29.10	2.02
BSE MidCap	47510	0.52	1.39	17.20	1.40
BSE LargeCap	9404	-0.20	-9.34	8.98	-4.36
Sectoral indices					
BSE IT	25718	-2.48	-8.69	-7.91	-32.54
BSE Oil & Gas	26029	0.34	-2.66	1.84	-6.59
BSE FMCG	18186	-0.43	-0.43	8.41	-10.16
BSE Auto	58587	0.31	1.04	11.35	9.52
BSE Bankex	65034	-0.25	6.38	14.94	1.33
BSE Teck	14058	-1.48	-5.64	-4.55	-24.99
BSE Capital Goods	81413	0.55	0.74	26.73	12.55
BSE Consumer Durable	59629	0.98	3.37	13.32	-0.26

Turnover (Rs Cr)	30 June	29 June
BSE Cash	10973	10048
NSE Cash	140407	183492
NSE F&O	75030365	27697240

Rs. Cr (Equity)	FII Inv 29 June	MF Inv 24 June	DII Inv 30 June
Buy	28,862	13,284	23,433
Sell	26,746	10,971	16,590
Net	2,116	2,313	6,842
Net (MTD)	-27,391	47,608	85,800
Net (YTD)	-272,009	292,830	462,585

	30 June	1Day	Month ago	Year ago
USD	94.60	94.35	95.38	85.54
GBP	125.13	124.75	128.18	117.47
Euro	107.72	107.60	111.11	100.45
100 Yen	58.27	58.31	59.89	59.43

Indian markets

- Indian equity benchmarks ended lower on Tuesday weighed down by declines in heavyweight sectors, such as banking, information technology and fast-moving consumer goods amid persistent concerns about weak global demand and potential disruption from artificial intelligence adoption.
- The top losers were Eicher Motors, Tata Consumer Products, Tata Consultancy Services, Infosys, and Wipro, down 2.92% - 4.38%.
- The top gainers were Maruti Suzuki India, Titan Company, Bajaj Finance, Adani Enterprises, and Eternal, up 2.24% - 5.52%.

Indian debt

- The interbank call-money rate ended higher at 5.45% on Tuesday compared to 5.35% on Monday.
- Government bond prices ended flat on Tuesday, as the downward pressure from weak global cues was balanced by strong foreign inflows and supportive policy measures.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.77% on Tuesday.

Indian Rupee

- The spot rupee ended lower against the US dollar on Tuesday owing to weakness in the domestic equity market.

Regulatory

- The Reserve Bank released its Financial Stability Report, presenting the collective assessment of the Sub-Committee of the Financial Stability and Development Council on the resilience of India's financial system and risks to financial stability.
- The Reserve Bank of India has warned that NBFC asset quality may weaken, with gross NPAs rising to 2.8% by March 2027 and capital buffers potentially declining to 20.8%, indicating stress in the sector.
- According to the RBI's latest Financial Stability Report (FSR) the overall debt of the household sector reached 45.5% of the country's gross domestic product (GDP) due to an uptick in non-housing retail loans.
- SEBI has proposed significant governance reforms for alternative investment funds (AIFs), aiming to standardize investor consent, strengthen oversight of conflict-of-interest transactions, and introduce a uniform 75% approval threshold for key decisions, thereby enhancing transparency, consistency, and investor protection.
- SEBI has set up an expert panel to review the debenture trustee framework, aiming to enhance investor protection and market efficiency.

Economy and Government

- India's fiscal deficit widened to Rs 1.6 trillion in April-May 2026-27 from Rs 0.1 trillion a year earlier. The deficit reached 9.6% of the full-year target, compared with 0.8% in the same period last year.
- The Chief Economic Adviser stated that pension funds can play a key role in building a developed India, by supporting long-term capital formation.
- The Finance Ministry expects inflation to remain contained in the coming months, supported by stable supply conditions and policy measures.
- Finance Ministry report said the economy remains resilient, though moderation in some high-frequency indicators suggests a gradual easing of momentum.

Domestic Debt Market Indicators

Instrument	30 June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.45%	5.35%	5.55%	7.00%	7.00%	5.25%
3-Month T-Bill	5.24%	5.28%	5.53%	5.40%	5.40%	5.39%
6-Month T-Bill	5.42%	5.41%	5.70%	5.51%	5.51%	5.50%
1-year T-Bill	5.60%	5.60%	5.98%	5.70%	5.70%	5.53%
3-Month CD	6.20%	6.60%	7.21%	7.35%	7.35%	5.82%
6-Month CD	6.70%	6.88%	7.70%	7.30%	7.30%	6.10%
1-year CD	7.05%	7.05%	7.90%	7.25%	7.25%	6.32%
3-Month CP	6.63%	7.02%	8.00%	7.75%	7.75%	6.20%
6-Month CP	7.15%	7.25%	8.13%	7.65%	7.65%	6.50%
1-year CP	7.40%	7.45%	8.35%	7.60%	7.60%	6.75%
1-year Gilt	5.66%	5.69%	6.06%	5.82%	5.82%	5.60%
3-year Gilt	6.15%	6.20%	6.52%	6.43%	6.43%	5.88%
5-year Gilt	6.42%	6.43%	6.82%	6.90%	6.90%	6.01%
1-year AAA	7.31%	7.36%	7.95%	7.57%	7.57%	6.55%
3-year AAA	7.23%	7.28%	7.84%	7.51%	7.59%	6.58%
5-year AAA	7.29%	7.34%	7.84%	7.67%	7.67%	6.72%
10-year G-sec	6.76%	6.77%	7.00%	7.02%	7.02%	6.32%
Net LAF (Rs Cr)	-13077	-41563	103837	245161	245161	261774
Forex reserves ($ bn)	672.59	671.63	681.38	698.35	642.49	697.94

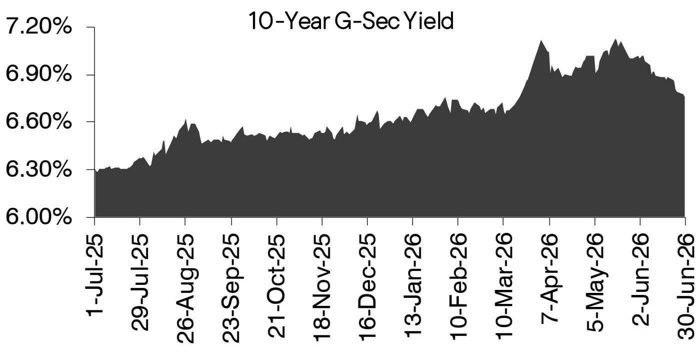
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.42	7.09	7.81	7.89	9.12	9.60
1 Year	5.66	7.31	8.03	8.11	9.34	9.82
3 Year	6.15	7.23	7.95	8.03	9.26	9.74
5 Year	6.42	7.29	8.11	8.19	9.42	9.90
10 Year	6.76	7.38	8.20	8.28	9.51	9.99

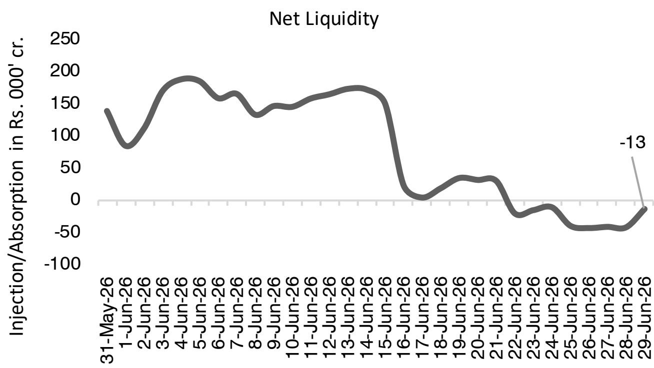
Rs. Cr (Debt)	FII Inv 29 June	MF Inv 24 June
Buy	2,714	22,390
Sell	290	23,773
Net	2,424	-1,382
Net (MTD)	31,370	-86,196
Net (YTD)	28,256	-472,206

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	5.10% (May'26)	5.30% (Feb'26)	4.80% (May'25)
GDP	7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY25)
India Manufacturing PMI	54.5 (Junee-26)	53.9 (Mar-26)	58.4 (Junee-25)
India Service PMI	57.3 (Junee-26)	57.5 (Mar-26)	60.4 (Junee-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

- Fibe's parent company has filed draft papers with SEBI for an IPO to raise Rs 750 crore via a fresh issue, aimed at strengthening its capital base and supporting business expansion.
- Stalwart People Services has filed DRHP for a Rs 150 crore IPO, indicating continued activity in the SME/primary market segment.
- Indus Valley raised $17 million in funding led by Gaja Capital, to expand its product portfolio, strengthen distribution, and scale its presence in the premium kitchenware segment.
- Kalpataru Projects International Limited (KPIL) has secured new orders worth around Rs 2,957 crore, including those from its international subsidiaries.
- Coal India plans to invest around Rs 1,900 crore in R&D by FY2030, focusing on clean coal technologies, mineral recovery, and net-zero initiatives.
- Transformers and Rectifiers (India) Limited has secured an order worth more than Rs 1,000 crore from Power Grid Corporation of India Ltd.
- Keystone Realtors has acquired fungible floor space index worth Rs 143.45 crore from Parth Construction to increase the development potential of its upcoming residential project in Versova, Mumbai.
- Adani Ports has signed a definitive agreement to sell a 49% stake in Vizhinjam Port to MSC's Terminal Investment Ltd for $1.397 billion, valuing the asset at $2.85 billion, to bring in strategic global expertise and capital for capacity expansion and enhanced trade connectivity.





Global market indices	30 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	52319.2	0.26	2.52	12.90	18.65
Nikkei 225	70062.32	0.86	5.63	37.21	73.05
FTSE	10497.12	0.12	0.84	3.15	19.82
Hang Seng	22881.02	-0.63	-9.14	-7.69	-4.95
Taiwan	46125.91	2.50	3.11	45.40	107.25

Global debt	30 June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.44	4.38	4.45	4.35	4.30	4.24
UK 10-Year (%)	4.77	4.73	4.81	4.93	4.88	4.48
German 10-Year (%)	2.91	2.86	2.93	3.04	3.01	2.60
Japan 10-Year (%)	2.69	2.64	2.66	2.36	2.35	1.43

Domestic	30 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	141286	-0.10	-9.70	-3.71	47.35
Silver (Rs / Kg)	225425	2.48	-14.40	-2.05	113.65
Aluminium (Rs / Kg)	334	-0.24	-13.79	-5.94	34.02
Copper (Rs / kg)	1314	3.05	-3.11	12.21	47.19
Lead (Rs / kg)	204	-0.54	-2.81	3.35	9.25
Zinc (Rs /Kg)	368	1.66	-1.06	14.10	39.96
Nickel (Rs / kg)	1603	-0.98	-12.53	-2.08	21.39

Global	30 June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	4023.69	-1.40	-10.62	-11.13	22.86
Silver (oz/$)	5819.00	-1.32	-23.10	-17.43	61.64
Brent ($/bbl)	72.95	-0.27	-19.94	-38.36	9.30
NYMEX crude ($/bbl)	69.50	-1.77	-20.44	-31.45	6.74

Upcoming market indicators

Date	Indicator	Previous
July 1	Eurozone Inflation Rate YoY Flash, June	3.2%
July 2	US Non Farm Payrolls, Junee	172K
July 6	Eurozone PPI, May	4.9%
July 7	UK Halifax House Price Index, June	0.5%
July 9	China Inflation Rate, June	1.2%

Global markets

- Wall Street stocks closed higher on Tuesday fueled by optimism surrounding economic growth and strong corporate earnings prospects.
- 10-year US bond yield ended flat at 4.26% amid uncertainty around geopolitical tensions.
- FTSE index closed higher on Tuesday buoyed by gains in defence and financial stocks, alongside optimism surrounding a potential US-Iran ceasefire.
- Asian markets were trading mostly higher at 8.30 AM.
- US jobs opening increased by 9,000 on month to 7.594 million in May 2026, the highest since May 2024.
- US House Price Index increased to 2.0% in April 2026 compared to 1.8% in March 2026.
- US Chicago PMI fell to 56.7 in June 2026 compared to 62.7 in May 2026.
- US Dallas Fed Services Index rose to 2.9 in June 2026 compared to a 7.7 drop in May 2026.
- UK current account deficit narrowed to £22.1 billion (2.8% of GDP) in Q1 2026, down from an upwardly revised £27.2 billion in the previous quarter.
- The British economy grew 0.9% year-on-year in Q1 2026, matching the pace recorded in the previous quarter.
- China RatingDog Manufacturing PMI inched down to 51.7 in June 2026 compared to 51.8 in May 2026.
- Japan S&P Global Manufacturing PMI edged up to 54.8 in June 2026 compared to 54.5 in May 2026.
- Japan construction orders declined 6.7% in May 2026, compared to 32.3% fall in April 2026.
- Japan housing starts surged 33.9% in May 2026, compared to a 11.4% increase in April 2026.

Commodity

- Crude oil prices fell by $1.25 to $69.50 a barrel on the NYMEX amid expectations of potential US-Iran talks and easing concerns over supply.
- Domestic gold prices declined marginally 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%