

Daily Market Monitor

June 05, 2025

Domestic Market Performance

Indian market indices	4-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24620	0.32	1.12	10.27	12.50
BSE Sensex	80998	0.32	0.62	9.98	12.37
BSE 100	25835	0.30	1.75	10.91	12.02
BSE 200	11210	0.38	2.32	10.99	11.35
BSE 500	35791	0.40	3.37	11.70	11.39
BSE SmallCap	52869	0.58	11.62	22.48	17.59
BSE MidCap	45503	0.76	6.54	15.72	11.56
BSE LargeCap	9495	0.31	1.71	9.37	10.62
Sectoral indices					
BSE IT	36559	0.34	3.84	2.56	10.97
BSE Oil & Gas	26881	0.53	0.77	-2.76	0.51
BSE FMCG	20385	0.14	-0.12	5.52	3.19
BSE Auto	52333	0.30	4.82	6.49	-0.57
BSE Bankex	62704	-0.03	-0.01	17.17	17.04
BSE Teck	17828	0.75	2.98	10.65	15.82
BSE Capital Goods	70713	0.18	12.84	16.03	9.08
BSE Consumer Durable	57597	0.36	1.94	10.18	7.48

Turnover (Rs Cr)	4-June	3-June
BSE Cash	9412	11722
NSE Cash	110840	116212
NSE F&O	14253261	12583808

Rs. Cr (Equity)	FII Inv 3-June	MF Inv 2-June	DII Inv 4-June
Buy	17,397	10,915	13,045
Sell	20,692	7,185	10,478
Net	-3,295	3,730	2,567
Net (MTD)	-5,401	3,730	13,789
Net (YTD)	-97,544	195,425	291,419

	4-June	1Day	Month ago	Year ago
USD	85.96	85.46	83.86	83.53
GBP	116.14	115.56	111.61	106.61
Euro	97.71	97.60	94.95	90.83
100 Yen	59.66	59.74	57.74	53.87

Indian markets

- Indian equity benchmarks ended higher on Wednesday, driven by positive global cues and expectations that the Reserve Bank of India may cut the policy rate in its meeting later this week.
- The top gainers were Eternal, Jio Financial, Bharti Airtel, IndusInd Bank and Reliance, up 1.28-3.36%.
- The top losers were Bajaj Finserv, Trent, Shriram Finance, Axis Bank and TCS, down 0.71-1.80%.

Indian debt

- The interbank call money rate ended lower at 5.45% on Wednesday compared to 5.80% on Tuesday.
- Government bond prices ended flat on Wednesday as investors remained on the side lines ahead of release of the RBI's monetary policy decision due later this week.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended flat at 6.26% on Wednesday.
- Meanwhile, the yield of the new 10-year benchmark 06.33% GS 2035 paper ended at 6.21% on Wednesday compared to 6.20% on Tuesday.

Indian Rupee

- The rupee ended lower against the United States (US) dollar on Wednesday due to demand for the greenback and high crude oil price.

Economy and Government

- India HSBC Services PMI increased to 58.8 in May 2025 compared to 58.7 in April 2025 while the HSBC Composite PMI stood at 59.3 from 59.7.
- Himachal Pradesh Chief Minister Sukhvinder Singh Sukhu laid the foundation stone of the Durgesh Aranya Zoological Park and several other development projects worth Rs 100 crore in Dehra, Kangra district.
- The Election Commission of India introduced ECINET, a digital app that enables real-time voter turnout reporting, ensuring quick updates at the constituency level on polling days across India.
- The government unveiled a series of policy relaxations aimed at boosting high-tech manufacturing, including semiconductors and electronic components in special economic zones (SEZs).

Domestic Debt Market Indicators

Instrument	4-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.45%	5.80%	5.85%	5.75%	6.24%	6.45%
3-Month T-Bill	5.59%	5.61%	5.89%	6.49%	6.93%	6.88%
6-Month T-Bill	5.59%	5.60%	5.93%	6.57%	7.04%	7.00%
1-year T-Bill	5.61%	5.60%	5.89%	6.52%	7.07%	7.03%
3-Month CD	6.07%	6.05%	6.52%	7.53%	7.55%	7.11%
6-Month CD	6.27%	6.35%	6.66%	7.67%	7.37%	7.50%
1-year CD	6.36%	6.36%	6.75%	7.60%	7.62%	7.65%
3-Month CP	6.39%	6.39%	6.80%	7.80%	8.15%	7.80%
6-Month CP	6.69%	6.80%	6.99%	7.88%	7.71%	7.90%
1-year CP	6.80%	6.86%	7.09%	7.84%	8.10%	7.95%
1-year Gilt	5.64%	5.65%	5.96%	6.59%	7.14%	7.07%
3-year Gilt	5.73%	5.73%	6.04%	6.59%	7.16%	7.09%
5-year Gilt	5.85%	5.85%	6.09%	6.65%	7.05%	7.10%
1-year AAA	6.58%	6.58%	6.97%	7.52%	7.70%	7.70%
3-year AAA	6.62%	6.62%	6.98%	7.33%	7.70%	7.77%
5-year AAA	6.73%	6.73%	6.99%	7.29%	7.70%	7.62%
10-year G-sec	6.21%	6.20%	6.36%	6.74%	7.05%	7.03%
Net LAF (Rs Cr)	300527	277375	157877	-20417	-73145	50058
Forex reserves (\$ bn)	692.72	685.73	688.13	640.48	642.49	646.67

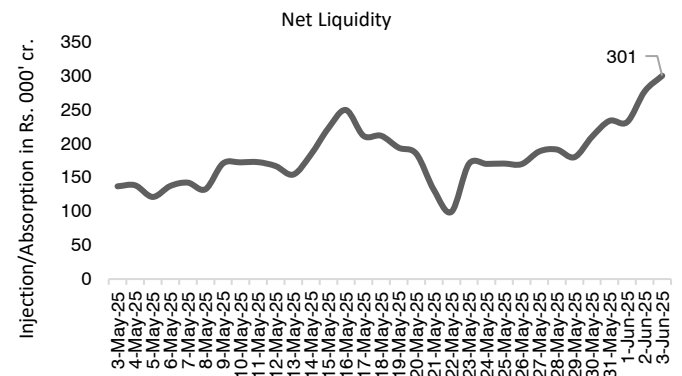
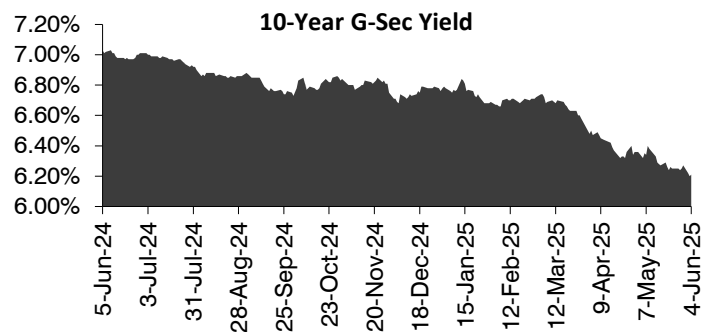
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.59	6.61	7.32	7.36	8.59	9.12
1 Year	5.64	6.58	7.29	7.33	8.56	9.09
3 Year	5.73	6.62	7.33	7.37	8.60	9.13
5 Year	5.85	6.73	7.54	7.57	8.81	9.34
10 Year	6.21	6.78	7.59	7.62	8.86	9.39

Rs. Cr (Debt)	FII Inv 3-June	MF Inv 2-June
Buy	859	5,648
Sell	730	7,111
Net	128	-1,463
Net (MTD)	582	-1,463
Net (YTD)	2,047	-297,401

Economic Indicators	Latest	Quarter	Year Ago
CPI	3.16% (Apr-25)	4.26% (Jan-25)	4.83% (Apr-24)
WPI	0.85% (Apr-25)	2.31% (Jan-25)	1.19% (Apr-24)
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)
India Manufacturing PMI	58.3 (May-25)	58.2 (Apr-25)	57.5 (May-24)
India Service PMI	58.8 (May-25)	58.7 (Apr-25)	60.2 (May-24)

Capital markets

- Brookfield Asset Management (BAM) plans to invest up to 95 billion Swedish crowns (\$9.91 billion) to build a data centre for artificial intelligence in Sweden.
- RPG Group firm and a global infrastructure major KEC International has secured orders worth Rs 2,211 crore across various businesses.
- County Group plans to invest Rs 1,800 crore to develop a housing project in Ghaziabad as part of its expansion plan.
- Vedanta Ltd increased its renewable energy power capacity to 1.03 GW and is on track to achieve 2.5 GW of green energy by 2030.
- Adani Airports Holdings Ltd (AAHL) raised \$750 million through external commercial borrowings from a group of international banks.
- Yes Bank plans to raise up to Rs 16,000 crore through a mix of equity and debt instruments.



Global market indices	4-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42427.74	-0.22	2.69	6.58	9.60
Nikkei 225	37747.45	0.80	2.49	-6.03	-2.81
FTSE	8801.29	0.16	2.38	10.67	6.92
Hang Seng	23654.03	0.60	5.11	43.00	28.25
Taiwan	21618.09	2.32	3.99	7.30	1.22

Global debt	4-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.37	4.46	4.33	4.22	4.21	4.34
UK 10-Year (%)	4.59	4.64	4.50	4.53	3.98	4.21
German 10-Year (%)	2.52	2.50	2.52	2.48	2.29	2.54
Japan 10-Year (%)	1.51	1.49	1.27	1.43	0.71	1.00

Domestic	4-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	96474	-0.41	2.68	43.45	34.05
Silver (Rs / Kg)	100980	0.52	7.28	36.23	13.67
Aluminium (Rs / Kg)	242	1.61	3.35	16.51	-0.33
Copper (Rs / kg)	878	0.80	4.37	15.68	0.61
Lead (Rs / kg)	181	0.11	0.30	0.30	-6.96
Zinc (Rs /Kg)	260	0.77	4.27	19.25	-2.38
Nickel (Rs / kg)	1343	0.37	0.94	-5.58	-17.75

Global	4-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3352.32	-0.63	4.19	-0.63	42.61
Silver (oz/\$)	3448.00	-0.23	7.01	-0.23	12.17
Brent (\$/bbl)	64.86	-1.17	5.82	-1.17	-16.33
NYMEX crude (\$/bbl)	62.85	-0.88	7.82	-0.88	-14.20

Global markets

- Wall Street stocks ended mixed on Wednesday with Nasdaq gaining supported by technology and chip stocks while the Dow Jones declined following downbeat U.S. economic data for May 2025.
- 10-year US bond yield ended lower at 4.37% following weak jobs data.
- FTSE index closed higher on Wednesday amid optimism global trade developments.
- Asian markets were trading higher at 8.30 AM.
- US S&P Global Services PMI rose to 53.7 in May 2025, compared to 50.8 in April 2025 while the S&P Global Composite PMI edged up to 53.0 from 50.6.
- US ISM Services PMI declined to 49.9 in May 2025 compared to 51.6 in April 2025.
- The US economy added 37000 workers to their payrolls in May 2025, compared to a downwardly revised 60000 in April 2025.
- Eurozone HCOB Services PMI edged down to 49.7 in May 2025 compared to 50.1 April 2025 while the HCOB Composite PMI came higher to 50.2 from 50.4.
- UK S&P Global Services PMI higher to 50.9 in May 2025 compared to 49 April 2025 while the S&P Global Composite PMI was up to 50.3 from 48.5.
- China Caixin General Services PMI rose to 51.1 in May 2025, compared to 50.7 in April 2025 while the Caixin China General Composite PMI dropped to 49.6 from 51.1.

Commodity

- Crude oil prices fell 56 cents to \$62.85 a barrel on the NYMEX due to a rise in US fuel inventories and concerns over demand amid OPEC+ output plans.
- Domestic gold prices ended lower due to a weaker dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
June 05	China Caixin Services PMI MAY	50.7
June 05	Eurozone Marginal Lending Rate	2.65%
June 06	UK BBA Mortgage Rate MAY	7.21%
June 06	UK Halifax House Price Index YoY	3.2%
June 07	China Foreign Exchange Reserves MAY	\$3.282T

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

Indicators		May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24	Aug-24
Debt Indicators	Currency in circulation (Rs billion)	38341	37762	36997	36444	35893	35643	35,589	35,103	34,994	35,231
	Repo rate	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.27%	6.36%	6.58%	6.72%	6.69%	6.76%	6.75%	6.85%	6.75%	6.86%
	Call rate	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%	6.50%
	Forex reserves (\$ billion; mthly. avg.)	689	682	656	638	629	648	666	694	688.744	674
	GDP	NA	NA	7.40%			6.40%			5.40%	
	Fiscal deficit (Rs billion)	NA	1863.32	2304.18	1773.1	2554.5	674.95	957.7	2763.0	393.44	1582.31
	IIP, %y/y	NA	2.70%	3.90%	2.90%	5.00%	3.20%	5.20%	3.50%	3.10%	-0.10%
	Exports, \$ billion	NA	38.49	41.97	36.91	36.43	38.01	32.11	39.2	34.58	34.71
	Imports, \$ billion	NA	64.91	63.51	50.96	59.42	59.95	69.95	66.34	55.36	64.36
	Manufacturing PMI	57.6	58.2	58.1	56.3	57.7	56.4	56.5	57.5	56.5	57.5
	Services PMI	58.8	58.7	58.5	59	56.5	59.3	58.4	58.5	57.7	60.9
	GST collections (Rs crore)	201050	236716	196141	183646	195506	176857	182,269	187,346	173,240	174,962
	India crude oil import (mbpd)	NA	21.2	22.7	19.1	21.2	20.2	19.07	19.71	18.79	20.18
Sector update	Auto – Passenger vehicles	NA	5.9%	2.4%	2.4%	2.3%	9.8%	20.7%	14.9%	-1.0%	-2.0%
	Auto – Two-wheelers	NA	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%	9.6%
	Auto – Commercial vehicles	NA	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%	-11.63%
	Auto – Tractors	NA	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%	-5.8%
	Banks – Deposit growth	10.00%	10.20%	10.60%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%	10.90%
	Banks – Credit growth	9.80%	10.30%	11.80%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%	13.50%
	Infra – Coal	NA	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%	-8.10%
	Infra – Electricity	NA	1.0%	6.2%	3.6%	2.4%	6.2%	4.40%	2.00%	-0.50%	-3.70%
	Infra – Steel	NA	3.0%	7.1%	6.9%	4.7%	7.3%	10.5%	5.70%	1.80%	4.10%
	Infra – Cement	NA	6.7%	11.6%	10.8%	14.6%	10.3%	13.10%	3.10%	7.20%	-2.50%

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