

Domestic Market Performance

Indian market indices	5-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24751	0.53	1.18	10.86	9.42
BSE Sensex	81442	0.55	0.80	10.58	9.49
BSE 100	25972	0.53	1.58	11.50	8.70
BSE 200	11267	0.51	2.04	11.56	7.99
BSE 500	35984	0.54	3.05	12.30	8.09
BSE SmallCap	53210	0.65	10.97	23.27	14.98
BSE MidCap	45680	0.39	5.43	16.17	7.27
BSE LargeCap	9547	0.55	1.56	9.97	7.46
Sectoral indices					
BSE IT	36687	0.35	3.82	2.92	8.64
BSE Oil & Gas	26875	-0.02	-1.18	-2.78	-1.78
BSE FMCG	20437	0.26	-1.08	5.79	-1.02
BSE Auto	52308	-0.05	2.83	6.44	-4.90
BSE Bankex	62774	0.11	1.01	17.30	12.44
BSE Teck	17887	0.33	2.79	11.02	13.16
BSE Capital Goods	71008	0.42	12.35	16.52	8.17
BSE Consumer Durable	57651	0.09	0.90	10.28	3.88

Turnover (Rs Cr)	5-June	4-June
BSE Cash	7791	9412
NSE Cash	117116	110840
NSE F&O	52518197	14253261

Rs. Cr (Equity)	FII Inv 4-June	MF Inv 3-June	DII Inv 5-June
Buy	17,867	11,895	13,191
Sell	16,262	7,617	10,809
Net	1,605	4,278	2,382
Net (MTD)	-3,795	8,008	16,171
Net (YTD)	-95,938	199,703	293,802

	5-June	1Day	Month ago	Year ago
USD	85.77	85.96	84.24	83.37
GBP	116.27	116.14	111.93	106.53
Euro	97.89	97.71	95.40	90.68
100 Yen	59.93	59.66	58.36	53.46

Indian markets

- Indian equity benchmarks closed higher, led by gains in the pharmaceutical and realty stocks, supported by falling US yields, easing oil prices and foreign fund inflows.
- The top gainers were Eternal, Dr Reddy's Labs, Trent, Power Grid Corporation and ICICI Bank, which were up 1.66-4.43%.
- The top losers were IndusInd Bank, Tata Consumer Products, Axis Bank, Bajaj Finserv and Bajaj Finance, which were down 0.59-1.37%.

Indian debt

- The interbank call money rate ended higher at 5.55% on Thursday compared to 5.45% on Wednesday.
- Government bond prices were little changed on Thursday ahead of the RBI's monetary policy decision due on Friday.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.25% on Thursday compared to 6.26% on Wednesday.
- Meanwhile, the yield of the new 10-year benchmark 06.33% GS 2035 paper ended at 6.20% on Thursday compared to 6.21% on Wednesday.

Indian Rupee

- The rupee closed higher against the US dollar on Thursday owing to easing crude oil prices and positive trend in the domestic equity market.

Regulatory

- RBI data showed private-sector banks had a sharper drop in loan growth in FY25 when overall growth moderated to 11.1%, from 15.3% the year before.
- SEBI came out with an operational framework for issuance of social bonds, sustainability bonds and sustainability-linked bonds, which together will be known as Environment, Social and Governance (ESG) debt securities.

Economy and Government

- Commerce and Industry Minister Piyush Goyal proposed to develop an industrial conclave for Italian businesses in India to promote investments.
- Finance Minister Nirmala Sitharaman and Kyrgyz Foreign Affairs Minister Zheenbek Kulubaev Moldokanovich signed a protocol for enforcement of a bilateral investment treaty to foster bilateral economic relations and encourage cross-border investments between the two nations.
- V Anantha Nageswaran, India's chief economic advisor said alternative data sources arising as the byproduct of everyday digital interactions can help policymakers in providing proactive intervention for economic growth
- The Centre has increased central deputation allowance for certain categories of officers.
- The Northern Railway said the Vande Bharat train service between Katra and Srinagar in Jammu and Kashmir will start commercial operations from June 7.
- The Khadi and Village Industries Commission (KVIC), under the Ministry of Micro, Small and Medium Enterprises (MSME) disbursed Rs 300 crore in margin money subsidy to 8,794 beneficiaries under the Prime Minister's Employment Generation Programme (PMEGP).

Domestic Debt Market Indicators

Instrument	5-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.55%	5.45%	5.75%	5.95%	6.24%	6.24%
3-Month T-Bill	5.55%	5.59%	5.87%	6.51%	6.93%	6.86%
6-Month T-Bill	5.55%	5.59%	5.90%	6.59%	7.04%	7.00%
1-year T-Bill	5.56%	5.61%	5.89%	6.57%	7.07%	7.02%
3-Month CD	6.07%	6.07%	6.52%	7.58%	7.55%	7.11%
6-Month CD	6.29%	6.27%	6.62%	7.69%	7.37%	7.50%
1-year CD	6.32%	6.36%	6.75%	7.63%	7.62%	7.65%
3-Month CP	6.36%	6.39%	6.74%	7.80%	8.15%	7.80%
6-Month CP	6.65%	6.69%	7.03%	7.88%	7.71%	7.90%
1-year CP	6.84%	6.80%	7.07%	7.88%	8.10%	7.95%
1-year Gilt	5.60%	5.64%	5.96%	6.58%	7.14%	7.07%
3-year Gilt	5.71%	5.73%	6.02%	6.58%	7.16%	7.06%
5-year Gilt	5.84%	5.85%	6.07%	6.63%	7.05%	7.07%
1-year AAA	6.58%	6.58%	6.97%	7.59%	7.70%	7.70%
3-year AAA	6.62%	6.62%	6.98%	7.40%	7.70%	7.77%
5-year AAA	6.73%	6.73%	6.99%	7.36%	7.70%	7.62%
10-year G-sec	6.20%	6.21%	6.32%	6.72%	7.05%	7.03%
Net LAF (Rs Cr)	286076	300527	121216	-54477	-73145	33822
Forex reserves (\$ bn)	692.72	685.73	688.13	640.48	642.49	646.67

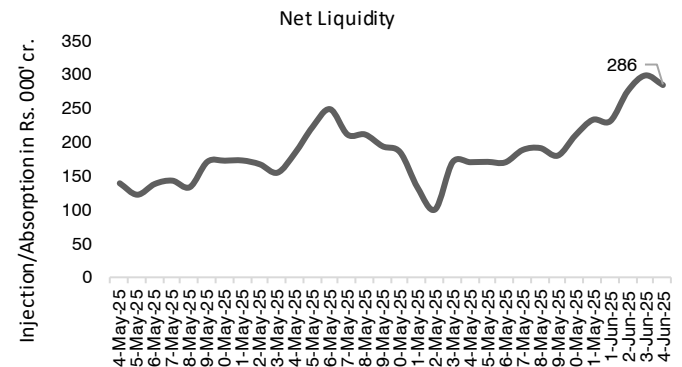
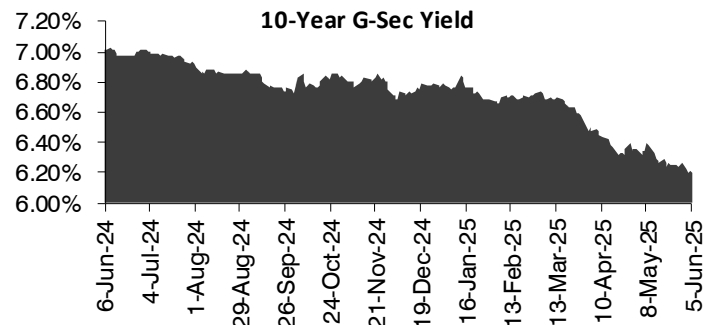
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.55	6.55	7.26	7.30	8.53	9.06
1 Year	5.60	6.58	7.29	7.33	8.56	9.09
3 Year	5.71	6.62	7.33	7.37	8.60	9.13
5 Year	5.84	6.73	7.54	7.57	8.81	9.34
10 Year	6.20	6.78	7.59	7.63	8.86	9.39

Rs. Cr (Debt)	FII Inv 4-June	MF Inv 3-June
Buy	1,013	13,954
Sell	2,136	10,483
Net	-1,123	3,471
Net (MTD)	-541	2,008
Net (YTD)	924	-293,930

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

- Newgen Software secured a \$2.5 million, five-year international order for its Enterprise Workflow and Content Management System.
- Bharat Electronics Ltd (BEL), a Navratna Defence Public Sector Undertaking (PSU) secured orders worth Rs 2,323 crore from two major Indian shipbuilders.
- KEC International secured fresh orders worth Rs 2,211 crore across multiple segments, including Transmission & Distribution, Oil & Gas Pipelines, and Cables.
- Ashoka Buildcon received letters of intent worth Rs 1,387.2 crore from the Motor Vehicles Department, Maharashtra, for various circles.
- Central Bank of India acquired a 24.91% equity stake in Future Generali India Insurance Company Limited (FGIICL) for Rs 451 crore.
- Cleantech asset financier StrideGreen raised \$3.5 million from Micelio Tech Fund, Incubate Fund Asia.
- HealthKois plans to roll out a \$400-million fund to invest in India's healthcare sector.
- Anduril Industries raised \$2.5 billion.



Global market indices	5-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42319.74	-0.25	2.67	6.31	9.05
Nikkei 225	37554.49	-0.51	1.97	-6.51	-2.43
FTSE	8811.04	0.11	2.50	10.79	6.84
Hang Seng	23906.97	1.07	6.23	44.53	29.75
Taiwan	21674.43	0.26	4.27	7.58	0.88

Global debt	5-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.40	4.37	4.36	4.28	4.21	4.29
UK 10-Year (%)	4.59	4.59	4.50	4.67	3.98	4.22
German 10-Year (%)	2.59	2.52	2.52	2.78	2.29	2.50
Japan 10-Year (%)	1.47	1.51	NA	1.43	0.71	0.99

Domestic	5-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	98163	1.75	3.02	45.96	36.36
Silver (Rs / Kg)	104675	3.66	11.24	41.21	18.24
Aluminium (Rs / Kg)	241	-0.64	3.13	15.77	0.12
Copper (Rs / kg)	884	0.68	4.74	16.47	2.61
Lead (Rs / kg)	182	0.14	-0.68	0.44	-4.92
Zinc (Rs /Kg)	259	-0.48	3.35	18.68	-2.21
Nickel (Rs / kg)	1343	0.04	0.29	-5.55	-16.51

Global	5-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3374.91	0.67	4.11	0.67	44.91
Silver (oz/\$)	3451.00	0.09	7.81	0.09	16.71
Brent (\$/bbl)	65.34	0.74	8.48	0.74	-16.67
NYMEX crude (\$/bbl)	63.37	0.83	10.92	0.83	-14.45

Global markets

- Wall Street stocks ended lower on Thursday led by sharp fall in Tesla shares.
- 10-year US bond yield ended higher at 4.40% as investors awaited the upcoming nonfarm payrolls report for more clarity on the state of the US economy.
- FTSE index ended higher on Thursday buoyed by gains in mining stocks tracking higher metal prices.
- Asian markets were trading mixed at 8.30 AM.
- US initial jobless claims rose by 8,000 to 247,000 in the week ending May 31, up from the previous week's revised figure of 239,000.
- The US trade gap narrowed sharply to \$61.6 billion in April 2025, the lowest since September 2023, compared to a \$138.3 billion gap in March.
- The ECB cut key interest rates by 25 bps to 2.15% from 2.4%, deposit Facility Rate to 2.0% and the marginal lending rate to 2.4% at its June meeting, based on updated inflation and economic forecasts.
- Eurozone HCOB Construction PMI fell to 45.6 in May 2025 compared to 46 in April 2025.
- Eurozone Producer Prices Index eased down 0.7% in April 2025 compared to 1.9% in March 2025.
- UK S&P Global Construction PMI rose to 47.9 in May 2025 compared to 46.6 in April 2025.

Commodity

- Crude oil prices rose 52 cents to \$63.37 a barrel on the NYMEX on demand hopes following reports that the US and China agreed to more trade talks.
- Domestic gold prices ended higher on safe haven demand.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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
June 09	US Wholesale Inventories MoM APR	0.4%
June 09	China Inflation Rate YoY MAY	-0.1%

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	NA	1863.32	2304.18	1773.1	2554.5
	IIP, %y/y	NA	2.70%	3.90%	2.90%	5.00%	NA	2.70%	3.90%	2.90%	5.00%
	Exports, \$ billion	NA	38.49	41.97	36.91	36.43	NA	38.49	41.97	36.91	36.43
	Imports, \$ billion	NA	64.91	63.51	50.96	59.42	NA	64.91	63.51	50.96	59.42
	Manufacturing PMI	57.6	58.2	58.1	56.3	57.7	57.6	58.2	58.1	56.3	57.7
	Services PMI	58.8	58.7	58.5	59	56.5	58.8	58.7	58.5	59	56.5
	GST collections (Rs crore)	201050	236716	196141	183646	195506	201050	236716	196141	183646	195506
	India crude oil import (mbpd)	NA	21.2	22.7	19.1	21.2	NA	21.2	22.7	19.1	21.2
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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