

Domestic Market Performance

Indian market indices	6-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25003	1.02	2.56	11.99	9.56
BSE Sensex	82189	0.92	1.92	11.59	9.48
BSE 100	26239	1.03	3.36	12.64	8.68
BSE 200	11382	1.02	4.04	12.70	7.72
BSE 500	36339	0.99	5.18	13.41	7.58
BSE SmallCap	53440	0.43	14.10	23.80	12.05
BSE MidCap	46097	0.91	8.74	17.23	5.83
BSE LargeCap	9647	1.04	3.34	11.12	7.45
Sectoral indices					
BSE IT	36837	0.41	4.78	3.34	6.05
BSE Oil & Gas	27080	0.76	1.70	-2.04	-3.62
BSE FMCG	20475	0.19	-0.63	5.99	-0.85
BSE Auto	53094	1.50	4.31	8.04	-3.86
BSE Bankex	63556	1.25	3.24	18.76	13.18
BSE Teck	17940	0.30	2.98	11.35	10.60
BSE Capital Goods	70798	-0.30	13.97	16.17	4.29
BSE Consumer Durable	58400	1.30	3.86	11.71	4.45

Turnover (Rs Cr)	6-June	5-June
BSE Cash	8879	7791
NSE Cash	132541	117116
NSE F&O	12287677	52518197

Rs. Cr (Equity)	FII Inv 5-June	MF Inv 4-June	DII Inv 6-June
Buy	18,265	7,742	22,523
Sell	18,215	6,219	13,180
Net	49	1,523	9,342
Net (MTD)	-3,746	9,531	25,513
Net (YTD)	-95,889	201,227	303,144

	6-June	1Day	Month ago	Year ago
USD	85.79	85.77	84.54	83.47
GBP	116.25	116.27	112.36	106.78
Euro	98.11	97.89	95.69	90.85
100 Yen	59.55	59.93	58.77	53.55

Indian markets

- Indian equity benchmarks ended higher on Friday after the Reserve Bank of India cut its key repo rate by a larger-than-expected 50 basis points to support economic growth.
- The top gainers were Shriram Finance, Bajaj Finance, JSW Steel, Axis Bank and Maruti Suzuki, up 2.77-5.65%.
- The top losers were HDFC Life, Bharat Electronics Ltd, Bharti Airtel, Tata Steel and Sun Pharma, down 0.23-0.85%.

Indian debt

- The interbank call money rate ended lower at 5.0% on Friday compared to 5.55% on Thursday.
- Government bond prices ended lower on Friday after the RBI unexpectedly cut the key rates by 50 basis points and changed the policy stance to neutral from accommodative.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.29% on Friday compared to 6.25% on Thursday.
- Meanwhile, the yield of the new 10-year benchmark 06.33% GS 2035 paper ended at 6.24% on Friday compared to 6.20% on Thursday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday due to foreign fund outflows and elevated crude oil prices.

Regulatory

- SEBI extended the additional liquidation timeline by one year till July 2026 for venture capital funds (VCFs) transitioning to alternative investment funds rules.

Economy and Government

- The Monetary Policy Committee (MPC) of the Reserve Bank of India (RBI) voted unanimously to cut the policy repo rate by 50 basis points (bps) to 5.50%
- Accordingly, the standing deposit facility (SDF) rate, the marginal standing facility (MSF) rate and bank rate are revised to 5.25%, 5.75% and 5.75%, respectively.
- The MPC shifted the policy stance to 'neutral' from 'accommodative', indicating limited policy space and the need to monitor data closely to balance growth and inflation
- The RBI expects GDP growth for fiscal 2026 at 6.5% while Consumer Price Index (CPI) inflation at 3.7% for fiscal 2026.
- PM Modi inaugurated the Chenab and Anji Khad bridges in Jammu and Kashmir, highlighting their strategic and economic importance.

Domestic Debt Market Indicators

Instrument	6-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.55%	5.85%	5.75%	6.24%	6.45%
3-Month T-Bill	5.36%	5.55%	5.89%	6.46%	6.93%	6.85%
6-Month T-Bill	5.40%	5.55%	5.90%	6.57%	7.04%	6.99%
1-year T-Bill	5.40%	5.56%	5.88%	6.54%	7.07%	7.00%
3-Month CD	5.74%	6.07%	6.50%	7.54%	7.55%	7.08%
6-Month CD	6.01%	6.29%	6.64%	7.69%	7.37%	7.50%
1-year CD	6.17%	6.32%	6.73%	7.66%	7.62%	7.65%
3-Month CP	6.05%	6.36%	6.74%	7.80%	8.15%	7.75%
6-Month CP	6.30%	6.65%	6.96%	7.88%	7.71%	7.90%
1-year CP	6.56%	6.84%	7.07%	7.90%	8.10%	7.95%
1-year Gilt	5.44%	5.60%	5.95%	6.58%	7.14%	7.00%
3-year Gilt	5.66%	5.71%	6.02%	6.55%	7.16%	7.04%
5-year Gilt	5.81%	5.84%	6.08%	6.60%	7.05%	7.04%
1-year AAA	6.43%	6.58%	6.97%	7.57%	7.70%	7.70%
3-year AAA	6.50%	6.62%	6.98%	7.38%	7.70%	7.73%
5-year AAA	6.61%	6.73%	6.99%	7.34%	7.70%	7.62%
10-year G-sec	6.23%	6.20%	6.35%	6.68%	7.05%	7.01%
Net LAF (Rs Cr)	303363	286076	137383	-56909	-73145	45020
Forex reserves (\$ bn)	691.49	692.72	688.13	640.48	642.49	646.67

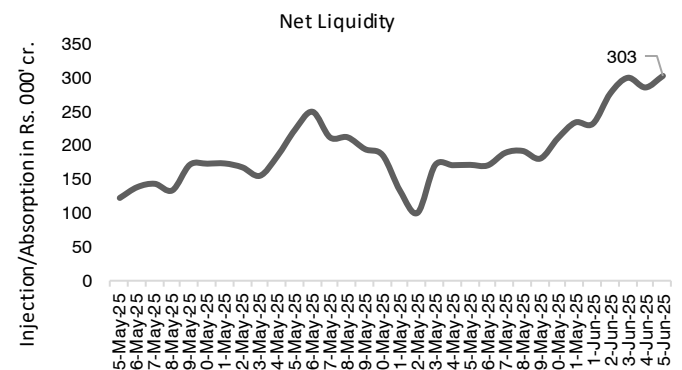
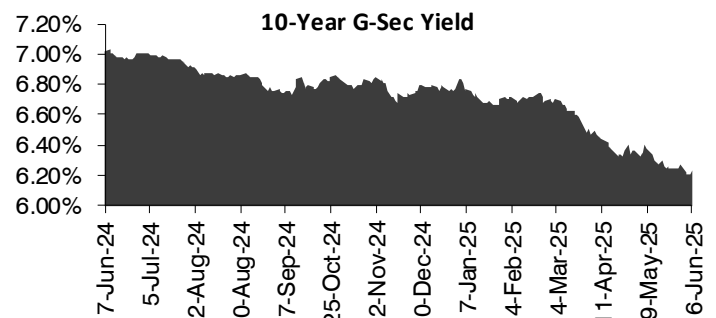
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.40	6.25	6.96	7.00	8.23	8.76
1 Year	5.44	6.43	7.14	7.18	8.41	8.94
3 Year	5.66	6.50	7.21	7.25	8.48	9.01
5 Year	5.81	6.61	7.42	7.45	8.69	9.22
10 Year	6.23	6.78	7.59	7.63	8.86	9.39

Rs. Cr (Debt)	FII Inv 5-June	MF Inv 4-June
Buy	844	13,158
Sell	924	20,753
Net	-80	-7,595
Net (MTD)	-621	-5,587
Net (YTD)	844	-301,525

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

- Netgear acquired Bengaluru-based cybersecurity startup Exium to enhance integrated services for managed service providers.
- NSE Sustainability Ratings and Analytics Ltd announced the launch of its ESG ratings for listed companies.
- Bharat Electronics Ltd. and Tata Electronics partnered to develop indigenous electronics and semiconductor solutions, supporting India's self-reliance goals.
- Surat-based KP Group inked three strategic initial pacts with energy and power management solutions provider Delta Electronics India.
- Wipro Consumer Care Ventures invested \$1 million in pet food startup Goofy Tails.
- Genpact has acquired XponentL Data, as it pivots towards data, AI and other advanced technologies to support clients throughout the AI transformation lifecycle.
- Akasa Air signed an agreement with Adani Airport Holdings Ltd (AAHL) to commence operations from the upcoming Navi Mumbai International Airport (NMIA).



Global market indices	6-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42762.87	1.05	4.74	7.42	9.97
Nikkei 225	37741.61	0.50	2.47	-6.04	-2.49
FTSE	8837.91	0.30	2.80	11.13	6.67
Hang Seng	23792.54	-0.48	4.99	43.84	28.77
Taiwan	21660.66	-0.06	5.55	7.52	-1.11

Global debt	6-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.51	4.40	4.30	4.29	4.21	4.29
UK 10-Year (%)	4.64	4.59	4.51	4.67	3.98	4.20
German 10-Year (%)	2.56	2.59	2.53	2.88	2.29	2.54
Japan 10-Year (%)	1.48	1.47	1.29	1.50	0.71	0.96

Domestic	6-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	97145	-1.04	0.27	44.45	33.52
Silver (Rs / Kg)	105285	0.58	9.84	42.03	16.46
Aluminium (Rs / Kg)	241	-0.04	3.19	15.72	-0.12
Copper (Rs / kg)	877	-0.75	2.96	15.59	0.73
Lead (Rs / kg)	183	0.83	0.19	1.27	-5.50
Zinc (Rs /Kg)	257	-0.83	2.39	17.69	-1.63
Nickel (Rs / kg)	1341	-0.13	-0.15	-5.67	-15.73

Global	6-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3354.01	-0.62	1.21	-0.62	42.41
Silver (oz/\$)	3566.00	3.33	10.40	3.33	18.83
Brent (\$/bbl)	66.47	1.73	6.95	1.73	-16.78
NYMEX crude (\$/bbl)	64.58	1.91	9.29	1.91	-14.52

Global markets

- Wall Street stocks ended higher on Friday as stronger-than-expected jobs data eased economic growth concerns and hopes for US-China trade talks lifted sentiment.
- 10-year US bond yield ended higher at 4.51% following upbeat jobs data.
- FTSE index closed higher on Friday as a US jobs report eased economic slowdown fears.
- Asian markets were trading higher at 8.30 AM.
- US nonfarm payrolls increased by 139,000 in May 2025, a small slowdown from April's downwardly revised 147,000
- The US unemployment rate held steady at 4.2% in May 2025 for a second straight month, matching market expectations.
- Eurozone retail sales rose by 2.3% in April 2025 compared to an upwardly revised 1.9% increase in March 2025.
- The Eurozone economy expanded 1.5% in the first quarter of 2025 compared to 1.2% in the fourth quarter of 2024.
- UK Halifax House Price Index increased 2.5% in May 2025, compared to 3.2% rise in April 2025.
- China annual inflation dropped by 0.1% year-on-year in May 2025, maintaining the same pace for the third month.
- China Producer Prices fell 3.3% in May 2025, compared to a 2.7% drop in April 2025.
- The Japanese economy contracted by -0.2% on an annualized basis in Q1 2025 compared to the downwardly revised 2.2% growth in Q4 of 2024.
- Japan Coincident Index fell to 115.5 in April 2025 compared to 115.8 in March 2025 while the Leading Economic Index declined to 103.4 in April 2025 from a downwardly revised 107.6.

Commodity

- Crude oil prices rose \$1.21 to \$64.58 a barrel on the NYMEX on demand hopes following strong US nonfarm data and renewed trade talks between US and China.
- Domestic gold prices ended lower due to strong US jobs data and improved trade talks between the US and China.

Forthcoming results

NA	NA

Upcoming market indicators

Date	Indicator	Previous
June 09	US Wholesale Inventories APR	0.4%
June 09	China Inflation Rate MAY	-0.1%
June 10	UK Unemployment Rate APR	4.5%
June 11	US Inflation Rate MAY	0.2%
June 11	UK Industrial Production APR	-0.7%

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	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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