

# Daily Market Monitor

June 10, 2025

**TATA**  
mutual fund

## Domestic Market Performance

Indian market indices	9-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25103	0.40	4.56	12.43	7.78
BSE Sensex	82445	0.31	3.76	11.94	7.50
BSE 100	26388	0.57	5.49	13.28	7.25
BSE 200	11454	0.63	6.20	13.41	6.46
BSE 500	36597	0.71	7.30	14.21	6.38
BSE SmallCap	54075	1.19	15.69	25.27	10.96
BSE MidCap	46570	1.03	10.59	18.43	5.57
BSE LargeCap	9702	0.57	5.54	11.75	6.02
Sectoral indices					
BSE IT	37213	1.02	5.86	4.40	3.63
BSE Oil & Gas	27383	1.12	4.94	-0.95	-4.30
BSE FMCG	20558	0.41	1.87	6.42	-1.56
BSE Auto	53350	0.48	5.23	8.56	-5.78
BSE Bankex	63996	0.69	4.74	19.58	12.73
BSE Teck	18047	0.59	4.22	12.01	7.67
BSE Capital Goods	71317	0.73	13.47	17.02	3.58
BSE Consumer Durable	58433	0.06	2.80	11.78	2.24

Turnover (Rs Cr)	9-June	6-June
BSE Cash	8177	8879
NSE Cash	117746	132541
NSE F&O	7768008	12287677

Rs. Cr (Equity)	FII Inv 6-June	MF Inv 5-June	DII Inv 9-June
Buy	15,541	9,859	15,306
Sell	14,276	8,515	11,802
Net	1,265	1,344	3,504
Net (MTD)	-2,481	10,876	29,017
Net (YTD)	-94,624	202,571	306,648

	9-June	1Day	Month ago	Year ago
USD	85.50	85.79	85.64	83.38
GBP	115.93	116.25	113.40	106.69
Euro	97.66	98.11	96.29	90.82
100 Yen	59.24	59.55	58.92	53.61

## Indian markets

- Indian equity benchmarks ended higher on Monday supported by the Reserve Bank of India's bigger-than-expected rate cut, upbeat US non-farm payroll data and progress in US-China trade talks.
- The top gainers were Jio Financial, Kotak Mahindra, Bajaj Finance, Trent and Axis Bank, up 2.12-3.49%.
- The top losers were Eternal, ICICI Bank, Titan Company, Mahindra & Mahindra and Adani Ports, down 0.31-1.92%.

## Indian debt

- The interbank call money rate ended lower at 4.90% on Monday compared to 5.0% on Friday.
- Government bond prices ended lower on Monday as investors continued to cut positions further following RBI's unexpected decision to cut key rates and shift policy stance.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.35% on Monday compared to 6.29% on Friday.
- Meanwhile, the yield of the new 10-year benchmark 06.33% GS 2035 paper ended at 6.28% on Monday compared to 6.24% on Friday.

## Indian Rupee

- The rupee ended higher against the US dollar on Monday because of a strong domestic equity performance and sustained foreign capital inflows.

## Regulatory

- The Reserve Bank of India announced that it will be discontinuing the daily Variable Rate Repo auctions with effect from June 11, 2025, due to the current and evolving liquidity conditions.
- RBI deputy governor M Rajeshwar Rao raised concerns over mis-selling of financial products saying that this without regard to suitability and appropriateness would beget distrust in schemes aimed at providing a safety net to the low-income households by creating artificial boundaries
- The Securities and Exchange Board of India (Sebi) announced a settlement scheme for stock brokers associated with certain algorithmic trading (algo) platforms that were found to be in violation of regulatory norms.
- Sebi proposed to revise the existing frequently asked questions (FAQs) and introduce additional ones to incorporate consequential and regulatory changes arising from recent amendments to the Research Analysts (RA) norms.
- The Department of Telecommunications (DoT) has written to the state governments to consider using the telecom services of state-run operators Bharat Sanchar Nigam Ltd (BSNL) and Mahanagar Telephone Nigam Ltd (MTNL), citing data security needs.

## Economy and Government

- Jammu and Kashmir Lieutenant Governor Manoj Sinha launched a control centre to boost real-time surveillance on pilgrims visiting the Mata Vaishno Devi to ensure their safety.
- NHAI plans to launch a public Infrastructure Investment Trust (InvIT) to increase the overall investor base.
- The Central Board of Indirect Taxes and Customs (CBIC) said that quoting a document identification number (DIN) is not required for communications generated through the common portal of GST, including show-cause tax notices, if they already bear a reference number (RFN).

## Domestic Debt Market Indicators

Instrument	9-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.90%	5.00%	5.85%	5.80%	6.24%	6.00%
3-Month T-Bill	5.33%	5.36%	5.89%	6.48%	6.93%	6.85%
6-Month T-Bill	5.35%	5.40%	5.90%	6.57%	7.04%	6.99%
1-year T-Bill	5.40%	5.40%	5.86%	6.54%	7.07%	7.00%
3-Month CD	5.72%	5.74%	6.64%	7.56%	7.55%	7.08%
6-Month CD	6.00%	6.01%	6.80%	7.66%	7.37%	7.50%
1-year CD	6.15%	6.17%	6.85%	7.66%	7.62%	7.65%
3-Month CP	6.15%	6.05%	6.90%	7.81%	8.15%	7.80%
6-Month CP	6.39%	6.30%	7.16%	7.88%	7.71%	7.90%
1-year CP	6.52%	6.56%	7.20%	7.90%	8.10%	8.00%
1-year Gilt	5.49%	5.44%	6.06%	6.57%	7.14%	7.04%
3-year Gilt	5.70%	5.66%	6.04%	6.56%	7.16%	7.02%
5-year Gilt	5.88%	5.81%	6.08%	6.60%	7.05%	7.02%
1-year AAA	6.43%	6.43%	7.10%	7.57%	7.70%	7.70%
3-year AAA	6.50%	6.50%	7.10%	7.38%	7.70%	7.73%
5-year AAA	6.64%	6.61%	7.10%	7.34%	7.70%	7.62%
10-year G-sec	6.28%	6.23%	6.38%	6.69%	7.05%	7.02%
Net LAF (Rs Cr)	245148	244926	170742	-82465	-73145	-10472
Forex reserves (\$ bn)	691.49	692.72	686.06	638.70	642.49	651.51

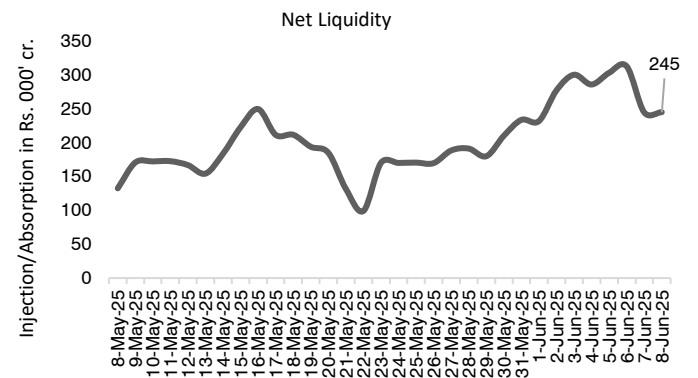
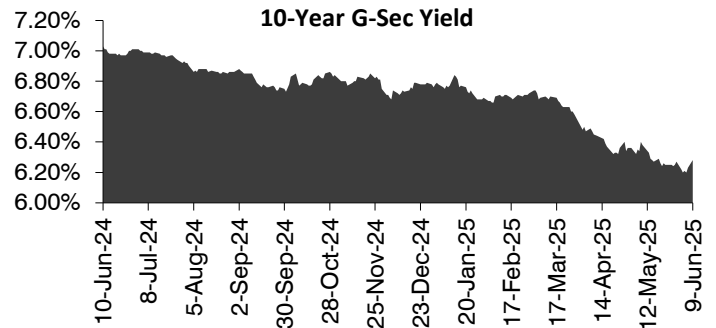
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.35	6.28	6.99	7.03	8.26	8.79
1 Year	5.49	6.43	7.14	7.18	8.41	8.94
3 Year	5.70	6.50	7.21	7.25	8.48	9.01
5 Year	5.88	6.64	7.45	7.48	8.72	9.25
10 Year	6.28	6.81	7.62	7.65	8.89	9.42

Rs. Cr (Debt)	FII Inv 6-June	MF Inv 5-June
Buy	993	16,299
Sell	256	19,345
Net	736	-3,047
Net (MTD)	116	-8,634
Net (YTD)	1,580	-304,572

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

- Lalithaa Jewellery Mart filed preliminary papers with markets regulator Sebi seeking its approval to raise Rs 1,700 crore through an Initial Public Offering (IPO).
- Vecmocon Technologies raised over \$18 million (about Rs 153 crore) in Series A funding round.
- Monolithisch India Limited announced the launch of its Initial Public Offering (IPO) on the NSE Emerge platform.



Global market indices	9-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42761.76	0.00	3.67	7.42	10.21
Nikkei 225	38088.57	0.92	1.56	-5.18	-1.54
FTSE	8832.28	-0.06	3.24	11.06	7.12
Hang Seng	24181.43	1.63	5.74	46.19	31.66
Taiwan	21790.29	0.60	4.18	8.16	-0.31

Global debt	9-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.49	4.51	4.37	4.32	4.21	4.44
UK 10-Year (%)	4.62	4.64	4.56	4.65	3.98	4.26
German 10-Year (%)	2.57	2.56	2.55	2.84	2.29	2.62
Japan 10-Year (%)	1.46	1.48	1.37	1.50	0.71	0.97

Domestic	9-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	95864	-1.32	-0.57	42.54	33.31
Silver (Rs / Kg)	105560	0.26	10.27	42.40	16.60
Aluminium (Rs / Kg)	240	-0.35	1.85	15.31	-0.27
Copper (Rs / kg)	883	0.64	2.93	16.34	1.56
Lead (Rs / kg)	183	-0.14	0.97	1.13	-7.00
Zinc (Rs /Kg)	256	-0.39	0.37	17.24	-3.03
Nickel (Rs / kg)	1344	0.17	0.04	-5.51	-13.34

Global	9-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3312.20	-1.25	0.25	-1.25	39.34
Silver (oz/\$)	3598.00	0.90	10.84	0.90	14.81
Brent (\$/bbl)	67.04	0.86	4.90	0.86	-16.22
NYMEX crude (\$/bbl)	65.29	1.10	7.00	1.10	-13.56

## Global markets

- Wall Street stocks ended mixed on Monday with Nasdaq closing higher supported by gains in Amazon and Alphabet while Dow Jones ended flat as investors awaited progress in US-China trade talks.
- 10-year US bond yield ended lower at 4.49% as investors remained on the edges with focus on US-China trade talks.
- FTSE index closed flat on Monday as investors were cautious ahead of US-China trade talks in London.
- Asian markets were trading higher at 8.30 AM.
- US Consumer Inflation Expectations declined to 3.2% in May 2025 compared to 3.6% in April 2025.
- US wholesale inventories increased by 0.2% to \$908.7 billion in April 2025, compared to a downward revision to 0.3% in March 2025.
- China's trade surplus widened sharply to \$103.22 billion in May 2025, up from \$81.74 billion in the same period a year earlier.
- Japan Economy Watchers Survey Index rose to 44.4 in May 2025, compared to 42.6 in April 2025 while the Economy Watchers Survey Outlook increased to 44.80 from 42.70.

## Commodity

- Crude oil prices rose 71 cents to \$65.29 a barrel on the NYMEX due to awaited trade talks from US-China raising hopes of easing tensions.
- Domestic gold prices ended lower due to easing global trade war concerns.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
June 10	UK Unemployment Rate APR	4.5%
June 11	US Inflation Rate MAY	0.2%
June 11	UK Industrial Production APR	-0.7%
June 12	India Inflation Rate MAY	0.31%
June 13	Eurozone Industrial Production APR	3.6%

**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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