

Domestic Market Performance

Indian market indices	10-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25104	0.00	4.57	12.44	7.93
BSE Sensex	82392	-0.06	3.70	11.87	7.72
BSE 100	26394	0.02	5.52	13.31	7.31
BSE 200	11455	0.02	6.22	13.42	6.42
BSE 500	36609	0.03	7.34	14.25	6.22
BSE SmallCap	54251	0.33	16.06	25.68	10.18
BSE MidCap	46589	0.04	10.63	18.48	5.03
BSE LargeCap	9702	0.01	5.55	11.76	6.07
Sectoral indices					
BSE IT	37799	1.58	7.52	6.04	6.86
BSE Oil & Gas	27401	0.07	5.01	-0.88	-3.98
BSE FMCG	20627	0.33	2.21	6.77	-1.37
BSE Auto	53308	-0.08	5.15	8.48	-5.82
BSE Bankex	63910	-0.13	4.60	19.42	12.50
BSE Teck	18204	0.87	5.13	12.99	9.92
BSE Capital Goods	71464	0.21	13.70	17.26	3.79
BSE Consumer Durable	58688	0.44	3.25	12.27	2.24

Turnover (Rs Cr)	10-June	9-June
BSE Cash	9435	8177
NSE Cash	115863	117746
NSE F&O	9390823	7768008

Rs. Cr (Equity)	FII Inv 9-June	MF Inv 5-June	DII Inv 10-June
Buy	13,312	9,859	13,788
Sell	10,900	8,515	12,675
Net	2,412	1,344	1,113
Net (MTD)	-69	10,876	30,131
Net (YTD)	-92,212	202,571	307,761

	10-June	1Day	Month ago	Year ago
USD	85.59	85.50	85.64	83.51
GBP	115.62	115.93	113.40	106.04
Euro	97.61	97.66	96.29	89.72
100 Yen	59.24	59.24	58.92	53.25

Indian markets

- Indian equity benchmarks ended flat on Tuesday as profit-booking in financial stocks offset gains from the Reserve Bank of India's policy support and progress in the US-China trade talks.
- The top losers were Trent, Asian Paints, Bajaj Finance, Tata Steel and Bajaj Finserv, down 0.96-1.68%.
- The top gainers were Grasim, Dr Reddys Labs, Tata Motors. Tech Mahindra and Infosys, up 1.47-3.81%.

Indian debt

- The interbank call money rate ended higher at 5.25% on Tuesday compared to 4.90% on Monday.
- Government bond prices ended marginally lower on Tuesday due to a weak demand for state debt at an auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.29% on Tuesday compared to 6.28% on Monday.

Indian Rupee

- The rupee ended lower against the United States (US) dollar on Tuesday, with investors focusing on trade talks between the US and China and its impact on the dollar index. Another factor was the rise in crude oil prices.

Economy and Government

- The World Bank lowered India's economic growth projection to 6.3% for 2025-26, citing pressure on exports due to global uncertainties.
- Commerce and Industry Minister Piyush Goyal said the government is considering formulating a scheme to fund exporters, especially MSMEs, in registering new products in new markets with an aim to boost the country's outbound shipments.
- Union Minister for Road Transport and Highways Nitin Gadkari outlined a series of futuristic transport projects, including aerial pods and flash-charging electric buses, aimed at easing traffic congestion and modernising India's public transport infrastructure.
- The Department of Posts unveiled a new digital addressing system called Digipin, in partnership with IIT Hyderabad and ISRO's National Remote Sensing Centre.
- The Delhi cabinet has approved an ordinance to regulate fees charged by schools.
- Finance Minister Nirmala Sitharaman asked regulators and departments to expedite the refund of unclaimed deposits to rightful owners and streamline the KYC process.
- Uttar Pradesh plans to establish a research centre for premium 'Kalanamak rice' in partnership with the International Rice Research Institute (IRRI) to boost production and exports of the aromatic grain.
- The Telangana government has secured a significant investment of Rs 2,150 crores in the biotech, technology, and fintech sectors.

## Domestic Debt Market Indicators

Instrument	10-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.25%	4.90%	5.85%	6.25%	6.24%	6.40%
3-Month T-Bill	5.36%	5.33%	5.89%	6.48%	6.93%	6.84%
6-Month T-Bill	5.41%	5.35%	5.90%	6.57%	7.04%	6.99%
1-year T-Bill	5.42%	5.40%	5.86%	6.55%	7.07%	7.01%
3-Month CD	5.73%	5.72%	6.64%	7.57%	7.55%	7.08%
6-Month CD	6.06%	6.00%	6.80%	7.65%	7.37%	7.45%
1-year CD	6.24%	6.15%	6.85%	7.59%	7.62%	7.65%
3-Month CP	6.15%	6.15%	6.90%	7.84%	8.15%	7.80%
6-Month CP	6.39%	6.39%	7.16%	7.91%	7.71%	7.90%
1-year CP	6.60%	6.52%	7.20%	7.93%	8.10%	8.00%
1-year Gilt	5.54%	5.49%	6.06%	6.59%	7.14%	7.00%
3-year Gilt	5.76%	5.70%	6.04%	6.58%	7.16%	7.03%
5-year Gilt	5.95%	5.88%	6.08%	6.61%	7.05%	7.03%
1-year AAA	6.52%	6.43%	7.10%	7.57%	7.70%	7.70%
3-year AAA	6.66%	6.50%	7.10%	7.38%	7.70%	7.65%
5-year AAA	6.80%	6.64%	7.10%	7.34%	7.70%	7.62%
10-year G-sec	6.29%	6.28%	6.38%	6.70%	7.05%	7.03%
Net LAF (Rs Cr)	244699	245148	170742	-144866	-73145	-23007
Forex reserves (\$ bn)	691.49	692.72	686.06	638.70	642.49	651.51

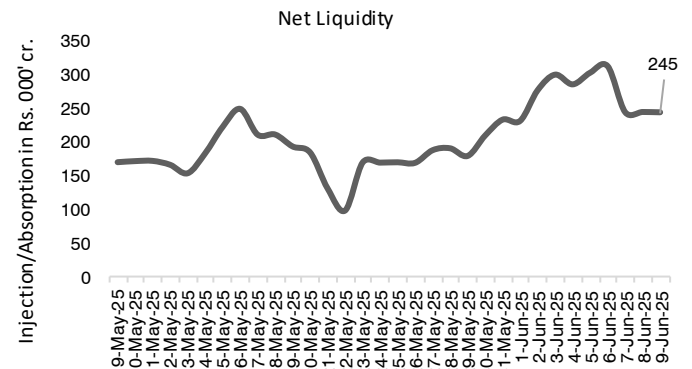
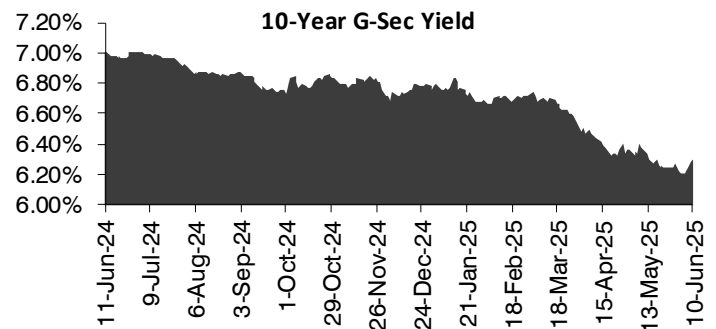
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.41	6.30	7.01	7.05	8.28	8.81
1 Year	5.54	6.52	7.23	7.27	8.50	9.03
3 Year	5.76	6.66	7.37	7.41	8.64	9.17
5 Year	5.95	6.80	7.61	7.64	8.88	9.41
10 Year	6.29	6.87	7.68	7.71	8.95	9.48

Rs. Cr (Debt)	FII Inv 9-June	MF Inv 5-June
Buy	56	16,299
Sell	282	19,345
Net	-227	-3,047
Net (MTD)	-111	-8,634
Net (YTD)	1,354	-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

- Karamtara Engineering has received final observations from the Securities and Exchange Board of India (Sebi) for its initial public offering (IPO).
- CreditAccess Grameen has raised \$100 million in external commercial borrowing from banks in South Asia and the Far East.
- IFL Enterprises board has approved to raise up to Rs 49.14 crore through a rights issue of equity shares.
- FlexiLoans.com (Flexiloans) raised Rs 375 crore in its Series C funding round.



Global market indices	10-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42866.87	0.25	3.92	7.69	10.29
Nikkei 225	38211.51	0.32	1.89	-4.87	-2.12
FTSE	8853.08	0.24	3.49	11.32	7.59
Hang Seng	24162.87	-0.08	5.66	46.07	31.56
Taiwan	22242.14	2.07	6.35	10.40	1.76

Global debt	10-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.47	4.49	4.37	4.22	4.21	4.47
UK 10-Year (%)	4.55	4.62	4.56	4.65	3.98	4.37
German 10-Year (%)	2.53	2.57	2.55	2.83	2.29	2.67
Japan 10-Year (%)	1.48	1.46	1.37	1.52	0.71	1.03

Domestic	10-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	96359	0.52	-0.06	43.28	35.38
Silver (Rs / Kg)	107000	1.36	11.78	44.35	20.32
Aluminium (Rs / Kg)	241	0.46	2.31	15.84	1.45
Copper (Rs / kg)	893	1.12	4.08	17.64	3.64
Lead (Rs / kg)	183	0.14	1.10	1.27	-2.45
Zinc (Rs /Kg)	255	-0.14	0.24	17.08	-1.77
Nickel (Rs / kg)	1339	-0.32	-0.28	-5.81	-12.32

Global	10-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3333.56	0.64	0.89	0.64	45.48
Silver (oz/\$)	3666.00	1.89	12.94	1.89	25.81
Brent (\$/bbl)	66.87	-0.25	4.63	-0.25	-18.08
NYMEX crude (\$/bbl)	64.98	-0.47	6.49	-0.47	-16.41

## Global markets

- Wall Street stocks ended higher on Tuesday driven by Tesla gains and optimism around ongoing US-China trade talks.
- 10-year US bond yield ended lower at 4.47% with investors focusing on trade talks between US and China which enters second day.
- FTSE index closed higher on Tuesday as weak domestic labour data boosted hopes of more rate cuts amid US-China trade talks
- Asian markets were trading higher at 8.30 AM.
- US NFIB Small Business Optimism Index increased to 98.8 in May 2025 compared to 95.8 in April 2025.
- UK unemployment rate edged up to 4.6% in the three months to April 2025 from 4.5% in the previous period.
- Japan Producer prices rose 3.2% in May 2025 compared to a marginally revised 4.1% growth in April 2025.

## Commodity

- Crude oil prices fell 31 cents to \$64.98 a barrel on the NYMEX due to weak China demand and increasing OPEC+ production.
- Domestic gold prices ended higher due to weakness in the dollar index.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
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%
June 14	China Industrial Production, May	6.1%

**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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