

Domestic Market Performance

Indian market indices	12-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24888	-1.01	-0.15	11.47	6.71
BSE Sensex	81692	-1.00	-0.90	10.92	6.64
BSE 100	26109	-1.14	0.51	12.09	5.76
BSE 200	11321	-1.20	1.07	12.09	4.59
BSE 500	36154	-1.24	2.09	12.83	4.18
BSE SmallCap	53531	-1.38	9.93	24.01	6.57
BSE MidCap	45827	-1.52	4.79	16.54	1.47
BSE LargeCap	9596	-1.16	0.54	10.53	4.59
Sectoral indices					
BSE IT	37873	-1.04	0.92	6.25	7.03
BSE Oil & Gas	27317	-2.10	1.77	-1.19	-6.80
BSE FMCG	20256	-1.24	-2.30	4.85	-2.49
BSE Auto	52496	-1.71	0.16	6.82	-8.08
BSE Bankex	63210	-0.82	0.12	18.12	11.27
BSE Teck	18209	-0.97	-0.05	13.02	9.67
BSE Capital Goods	69775	-1.95	6.89	14.49	-1.22
BSE Consumer Durable	57394	-2.02	-1.80	9.79	-0.22

Turnover (Rs Cr)	12-June	11-June
BSE Cash	7005	8712
NSE Cash	117581	124232
NSE F&O	56948672	18783332

Rs. Cr (Equity)	FII Inv 11-June	MF Inv 10-June	DII Inv 12-June
Buy	15,628	10,101	21,386
Sell	15,759	9,500	11,992
Net	-131	601	9,394
Net (MTD)	2,878	19,705	41,109
Net (YTD)	-89,265	211,400	318,740

	12-June	1Day	Month ago	Year ago
USD	85.54	85.45	85.64	83.54
GBP	116.01	115.23	113.40	106.57
Euro	98.55	97.56	96.29	89.84
100 Yen	59.52	58.89	58.92	53.11

Indian markets

- Indian equity benchmarks ended lower on Thursday, dragged down by IT stocks due to global uncertainties, including a rise in Middle East tensions.
- The top losers were Tata Motors, Shriram Finance, Trent, Titan Company and Coal India, down 2.34-2.86%.
- The top gainers were Apollo Hospital, Dr Reddy's Labs, Bajaj Finserv, Asian Paints and Tech Mahindra, up 0.42-1.00%.

Indian debt

- The interbank call money rate ended flat at 5.0% on Thursday.
- Government bond prices ended higher on Thursday as investors covered short positions at lower level.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.28% on Thursday compared to 6.31% on Wednesday.

Indian Rupee

- The rupee ended lower against the US dollar on Thursday, owing to foreign institutional outflow from domestic equities and rise in crude oil prices.

Regulatory

- RBI allowed a special trading facility for state government securities, expanding a framework already available for central government bonds
- Reserve Bank of India (RBI) has directed banks and NBFCs to allow all transactions from so called low risk customers even if their KYC is pending. These customers have time till June 30, 2026 to update their KYC but transactions on their accounts will not be halted.
- Reserve Bank of India (RBI) data showed after surging past \$11 billion in March 2025, the proposals by Indian firms to raise funds through external commercial borrowings (ECBs) dropped to \$2.91 billion in April 2025.
- SEBI plans to launch validated UPI handles and a new verification tool called SEBI Check to protect investors and prevent financial fraud on October 1, 2025.
- Sebi mandates minimum two yearly PAC meetings for commodity exchanges

Economy and Government

- India consumer price inflation eased to 2.82% in May 2025 compared to 3.16% in April 2025.
- Union Home Minister Amit Shah said that the government has democratized technology, empowering the business sector and transforming India into a leading digital economy over the past 11 years.
- Commerce and Industry Minister Piyush Goyal said India's goods and services exports during 2025-26 are expected to cross \$900 billion despite the global economic uncertainties.
- Andhra Pradesh plans to disburse Rs 8,745 crore under a direct benefit scheme for mothers of school students.

Domestic Debt Market Indicators

Instrument	12-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.00%	5.85%	6.25%	6.24%	6.24%
3-Month T-Bill	5.37%	5.36%	5.89%	6.50%	6.93%	6.83%
6-Month T-Bill	5.43%	5.41%	5.90%	6.58%	7.04%	6.96%
1-year T-Bill	5.50%	5.51%	5.86%	6.52%	7.07%	6.99%
3-Month CD	5.80%	5.77%	6.64%	7.54%	7.55%	7.07%
6-Month CD	6.16%	6.17%	6.80%	7.68%	7.37%	7.42%
1-year CD	6.34%	6.30%	6.85%	7.59%	7.62%	7.65%
3-Month CP	6.22%	6.21%	6.90%	7.85%	8.15%	7.80%
6-Month CP	6.55%	6.55%	7.16%	7.93%	7.71%	7.90%
1-year CP	6.69%	6.69%	7.20%	7.85%	8.10%	7.95%
1-year Gilt	5.60%	5.60%	6.06%	6.59%	7.14%	6.99%
3-year Gilt	5.83%	5.79%	6.04%	6.57%	7.16%	7.01%
5-year Gilt	5.98%	5.98%	6.08%	6.60%	7.05%	7.03%
1-year AAA	6.65%	6.55%	7.10%	7.57%	7.70%	7.70%
3-year AAA	6.77%	6.69%	7.10%	7.38%	7.70%	7.65%
5-year AAA	6.83%	6.83%	7.10%	7.34%	7.70%	7.58%
10-year G-sec	6.29%	6.30%	6.38%	6.68%	7.05%	7.01%
Net LAF (Rs Cr)	257819	261993	166884	-138153	-73145	-7766
Forex reserves (\$ bn)	691.49	692.72	686.06	638.70	642.49	651.51

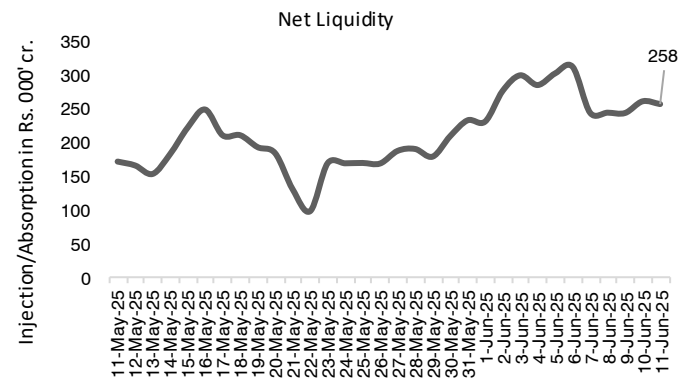
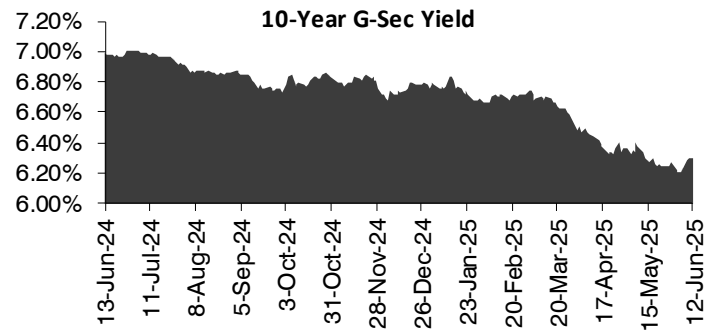
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.43	6.39	7.10	7.14	8.37	8.90
1 Year	5.60	6.65	7.36	7.40	8.63	9.16
3 Year	5.83	6.77	7.48	7.52	8.75	9.28
5 Year	5.98	6.83	7.64	7.67	8.91	9.44
10 Year	6.29	6.90	7.71	7.74	8.98	9.51

Rs. Cr (Debt)	FII Inv 11-June	MF Inv 10-June
Buy	416	21,688
Sell	2,945	21,147
Net	-2,529	541
Net (MTD)	-1,276	-7,540
Net (YTD)	188	-303,478

Economic Indicators	Latest	Quarter	Year Ago
CPI	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-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

- Canara Bank's Board of Directors approved a capital raising plan for the financial year 2025–26, amounting to up to Rs 9,500 crore.
- Oswal Pumps raises Rs 416 crore from anchor investors ahead of IPO
- Kisah Apparels raised Rs 13 crore in its latest funding round, led by Sagar Daryani of Wow Momo.
- Integrum Energy Infrastructure and Connplex Cinemas received regulatory approvals to move ahead with their respective initial public offerings (IPOs).
- Micron Technology is planning to expand its US investments in domestic memory manufacturing to about \$150 billion and in R&D to \$50 billion.



Global market indices	12-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42967.62	0.24	1.31	7.94	10.99
Nikkei 225	38173.09	-0.65	1.40	-4.97	-1.81
FTSE	8884.92	0.23	3.25	11.72	8.15
Hang Seng	24035.38	-1.36	2.06	45.30	33.99
Taiwan	22287.82	-0.81	5.48	10.63	1.08

Global debt	12-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.36	4.41	4.45	4.32	4.21	4.31
UK 10-Year (%)	4.47	4.55	4.64	4.72	3.98	4.15
German 10-Year (%)	2.48	2.54	2.64	2.89	2.29	2.53
Japan 10-Year (%)	1.45	1.46	1.47	1.51	0.71	0.97

Domestic	12-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	97455	1.27	4.70	44.91	36.15
Silver (Rs / Kg)	105498	0.00	10.94	42.32	19.62
Aluminium (Rs / Kg)	243	0.04	2.84	16.68	3.06
Copper (Rs / kg)	877	0.21	2.57	15.59	2.41
Lead (Rs / kg)	183	-1.03	0.11	1.13	-5.41
Zinc (Rs /Kg)	256	-0.20	-0.52	17.26	-0.85
Nickel (Rs / kg)	1320	-1.01	-3.01	-7.17	-12.39

Global	12-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3324.80	0.07	-0.05	0.07	43.61
Silver (oz/\$)	3614.00	-1.07	10.42	-1.07	23.39
Brent (\$/bbl)	69.36	-0.59	6.77	-0.59	-16.03
NYMEX crude (\$/bbl)	68.04	-0.16	9.83	-0.16	-13.32

Global markets

- Wall Street stocks ended higher on Thursday buoyed by strong outlook from Oracle which fueled optimism around artificial intelligence.
- 10-year US bond yield ended lower at 4.36% as demand for safe haven bonds increased amid resurfacing geopolitical tensions in Middle East.
- FTSE index ended higher on Thursday as intermittent rally in fuel prices supported gains in energy stocks.
- Asian markets were trading higher at 8.30 AM.
- US producer price inflation edged up to 2.6% year-over-year in May 2025 from an upwardly revised 2.5% in April
- UK construction output rose by 3.3% year-on-year in April 2025, compared to 1.4% in the previous two months.
- The UK trade deficit widened sharply to £7.03 billion in April 2025 from £3.70 billion in March 2025.
- The British economy expanded 0.9% in April 2025 compared to a 1.1% rise in March 2025.
- UK Industrial production fell by 0.3% on-year in April 2025, compared to a 0.7% decline in March 2025.

Commodity

- Crude oil prices fell \$1.63 to \$60.42 a barrel on the NYMEX amid concerns over rising OPEC+ supply and the potential economic impact of US tariffs.
- Domestic gold prices ended higher on safe haven demand.

Forthcoming results

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Upcoming market indicators

Date	Indicator	Previous
June 13	Eurozone Industrial Production APR	3.6%
June 14	China Industrial Production MAY	6.1%
June 14	India WPI Inflation MAY	0.85%
June 15	Japan BoJ Interest Rate Decision	0.5%
June 15	US Industrial Production MoM MAY	0%

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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