

Domestic Market Performance

Indian market indices	13-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24719	-0.68	0.57	10.71	5.64
BSE Sensex	81119	-0.70	-0.04	10.14	5.61
BSE 100	25941	-0.65	0.99	11.36	4.62
BSE 200	11252	-0.61	1.45	11.41	3.46
BSE 500	35947	-0.57	2.28	12.18	3.05
BSE SmallCap	53370	-0.30	8.53	23.64	5.31
BSE MidCap	45681	-0.32	4.28	16.17	0.35
BSE LargeCap	9532	-0.67	1.02	9.79	3.49
Sectoral indices					
BSE IT	37839	-0.09	3.11	6.16	5.79
BSE Oil & Gas	27162	-0.57	2.16	-1.74	-7.81
BSE FMCG	20066	-0.94	-2.18	3.87	-2.95
BSE Auto	52324	-0.33	0.81	6.47	-9.18
BSE Bankex	62570	-1.01	-0.02	16.92	10.26
BSE Teck	18195	-0.08	2.32	12.93	9.10
BSE Capital Goods	69767	-0.01	5.78	14.48	-3.22
BSE Consumer Durable	57110	-0.49	-2.42	9.25	-2.67

Turnover (Rs Cr)	13-June	12-June
BSE Cash	6974	7005
NSE Cash	104982	117581
NSE F&O	9962246	56948672

Rs. Cr (Equity)	FII Inv 12-June	MF Inv 11-June	DII Inv 13-June
Buy	12,662	9,044	13,488
Sell	15,938	8,752	10,446
Net	-3,276	293	3,041
Net (MTD)	-398	19,380	44,151
Net (YTD)	-92,541	211,076	321,781

	13-June	1Day	Month ago	Year ago
USD	86.10	85.54	84.89	83.55
GBP	116.56	116.01	112.03	106.80
Euro	99.32	98.55	94.30	90.25
100 Yen	59.99	59.52	57.40	53.17

Indian markets

- Indian equity benchmark indices ended lower on Friday due to heightened geopolitical tensions in the Middle East and uncertainty over US tariffs.
- Adani Ports, ITC, SBI, IndusInd Bank and Hindalco were the top losers, falling 1.42-2.82%.
- The top gainers were Bharat Electronics, ONGC, Tech Mahindra, Tata Consultancy Services and Wipro, which rose 0.23-1.76%.

Indian debt

- The interbank call money rate ended flat at 5.0% on Friday.
- Government bond prices ended lower on Friday as sentiment remained soured after the spike in oil prices.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.29% on Friday compared to 6.28% on Thursday.

Indian Rupee

- The rupee ended lower against the US dollar on Friday following a spike in global crude oil prices due to escalating tensions in the Middle East.

Regulatory

- Sebi urged Chief Financial Officers (CFOs) to reduce the time lag between the announcement of financial results and the publication of full annual reports, which is aimed at enhancing investors' confidence.
- Sebi's whole-time member (WTM) Ananth Narayan raised concerns over certain asset valuation practices, and proposed that valuers should disclose key assumptions, sensitivity ranges, and track records of firms they are assessing just like credit ratings agencies.

Economy and Government

- India's forex reserves increased by \$5.17 billion to \$696.66 billion for the week ending June 6.
- Asian Development Bank has approved a \$109.97 million (about Rs 927 crore) results-based loan to support Gujarat in advancing its vision of becoming a global industrial hub through a stronger, future-ready workforce.
- Andhra Pradesh's NDA government has initiated the 'Talliki Vandanam' scheme, promising Rs 15,000 annually to mothers for each school-going child.
- The ministry of skill development and entrepreneurship (MSDE) has entered into a collaboration with Shell India to impart skills training in green skills and electric vehicles (EV), aimed at equipping students and faculty with future-ready capabilities in green energy and e-mobility.
- Mumbai state-run power utility MSEDCL has filed an application before the Maharashtra Electricity Regulatory Commission (MERC), seeking a parallel licence to distribute electricity across the financial capital.
- The Mumbai Metropolitan Region Development Authority (MMRDA) has secured around 430 acres of land in Mogarpada area of Thane district to build the city's largest integrated metro depot.

Domestic Debt Market Indicators

Instrument	13-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	5.00%	5.45%	5.87%	6.24%	6.24%
3-Month T-Bill	5.35%	5.37%	5.85%	6.46%	6.93%	6.82%
6-Month T-Bill	5.42%	5.43%	5.87%	6.59%	7.04%	6.96%
1-year T-Bill	5.50%	5.50%	5.86%	6.51%	7.07%	6.97%
3-Month CD	5.86%	5.80%	6.53%	7.54%	7.55%	7.08%
6-Month CD	6.15%	6.16%	6.73%	7.69%	7.37%	7.42%
1-year CD	6.34%	6.34%	6.75%	7.59%	7.62%	7.65%
3-Month CP	6.25%	6.22%	6.80%	7.86%	8.15%	7.80%
6-Month CP	6.58%	6.55%	7.04%	8.00%	7.71%	7.90%
1-year CP	6.77%	6.69%	7.10%	7.85%	8.10%	7.95%
1-year Gilt	5.60%	5.60%	5.90%	6.58%	7.14%	6.97%
3-year Gilt	5.84%	5.83%	5.99%	6.58%	7.16%	6.99%
5-year Gilt	5.99%	5.98%	6.02%	6.60%	7.05%	7.01%
1-year AAA	6.68%	6.65%	6.95%	7.57%	7.70%	7.69%
3-year AAA	6.80%	6.77%	6.98%	7.38%	7.70%	7.64%
5-year AAA	6.86%	6.83%	6.98%	7.34%	7.70%	7.57%
10-year G-sec	6.30%	6.29%	6.33%	6.70%	7.05%	6.99%
Net LAF (Rs Cr)	276093	257819	154326	-154917	-73145	-14822
Forex reserves (\$ bn)	696.66	691.49	686.06	638.70	642.49	651.51

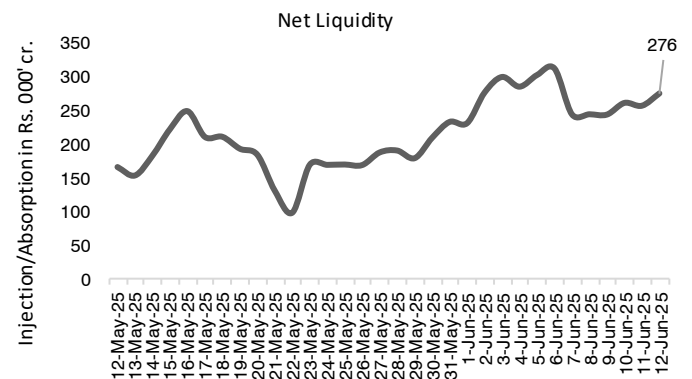
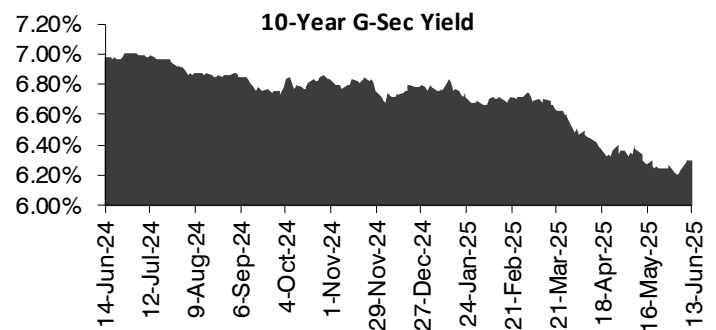
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.42	6.45	7.16	7.20	8.43	8.96
1 Year	5.60	6.68	7.39	7.43	8.66	9.19
3 Year	5.84	6.80	7.51	7.55	8.78	9.31
5 Year	5.99	6.86	7.67	7.70	8.94	9.47
10 Year	6.30	6.93	7.74	7.77	9.01	9.54

Rs. Cr (Debt)	FII Inv 12-June	MF Inv 11-June
Buy	559	16,775
Sell	517	20,292
Net	42	-3,517
Net (MTD)	-1,234	-13,733
Net (YTD)	231	-309,670

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

- SBI reduced its External Benchmark Lending Rate (EBLR) to 8.15% as against the old rate of 8.65%.
- National Bank for Agriculture and Rural Development (Nabard) obtained federal government approval to raise up to Rs 19,500 crore (\$2.3 billion) through deep-discount bonds.
- NTPC to raise Rs 4,000 crore through the issuance of non-convertible debentures (NCDs).
- Rayzon Solar to file draft papers for Rs 1,500-cr IPO
- ICRA to acquire risk solution firm Fintellix India for \$26 million



Global market indices	13-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42197.79	-1.79	0.14	6.00	9.19
Nikkei 225	37834.25	-0.89	-0.91	-5.81	-2.29
FTSE	8850.63	-0.39	2.88	11.29	8.41
Hang Seng	23892.56	-0.59	3.39	44.44	31.91
Taiwan	22072.95	-0.96	3.48	9.56	-1.07

Global debt	13-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.41	4.36	4.49	4.27	4.21	4.25
UK 10-Year (%)	4.56	4.47	4.67	4.68	3.98	4.17
German 10-Year (%)	2.54	2.48	2.68	2.85	2.29	2.49
Japan 10-Year (%)	1.40	1.45	1.45	1.52	0.71	0.96

Domestic	13-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99058	1.64	5.00	47.29	38.52
Silver (Rs / Kg)	106167	0.63	9.65	43.22	20.85
Aluminium (Rs / Kg)	242	-0.19	1.13	16.47	2.91
Copper (Rs / kg)	875	-0.27	1.04	15.28	1.46
Lead (Rs / kg)	186	1.50	1.03	2.66	-4.13
Zinc (Rs /Kg)	254	-0.86	-1.32	16.25	-3.76
Nickel (Rs / kg)	1318	-0.14	-2.19	-7.29	-12.27

Global	13-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3379.45	1.64	4.76	1.64	45.61
Silver (oz/\$)	3623.00	0.25	11.72	0.25	22.56
Brent (\$/bbl)	74.23	7.02	11.41	7.02	-10.30
NYMEX crude (\$/bbl)	72.98	7.26	14.62	7.26	-7.17

Global markets

- Wall Street stocks closed lower on Friday as escalating geopolitical tensions dampening investor confidence.
- 10-year US bond yield ended higher at 4.41% following Middle East tensions that drove up energy prices and led to concern that inflation may move higher.
- FTSE index closed lower on Friday as gains in energy sector were offset by rising Middle East tensions.
- Asian markets were trading mixed at 8.30 AM.
- US University of Michigan's consumer sentiment index rose to 60.5 in June 2025, up from a near-record low of 52.2 in both May and April.
- Eurozone industrial production rose by 0.8% year-on-year in April 2025, easing from an upwardly revised 3.7% gain in March.
- China Industrial Production rose by 5.8% on-year in May 2025, compared to 6.1% growth in April 2025.
- China Retail Sales increased by 6.4% in May 2025, compared to 5.1% in April 2025.
- China Unemployment Rate inched down to 5% in May 2025 compared to 5.1% in April 2025.
- Japan's industrial production increased 0.50% in April on year from 1.0% in March.
- Japan's capacity utilization increased by 1.3% from a month earlier April 2025, following a 2.4% decline in the previous period.

Commodity

- Crude oil prices rose \$4.94 to \$72.98 a barrel on the NYMEX as escalating geopolitical tensions raised concerns of supply disruptions.
- Domestic gold prices ended higher on safe haven demand following resurfacing global economic growth concerns amid escalating conflicts in Middle East.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
June 16	China House Price Index May	-4%
June 17	Japan BoJ Interest Rate Decision	0.5%
June 18	Japan Balance of Trade May	¥-115.8B
June 19	Eurozone Construction Output APR	-1.1%
June 20	Japan Inflation Rate MAY	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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