

Daily Market Monitor

June 17, 2025

Domestic Market Performance

Indian market indices	16-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24947	0.92	-0.29	11.73	6.31
BSE Sensex	81796	0.84	-0.65	11.06	6.24
BSE 100	26167	0.87	-0.02	12.34	5.01
BSE 200	11350	0.87	0.23	12.38	3.75
BSE 500	36241	0.82	0.79	13.10	3.25
BSE SmallCap	53573	0.38	4.95	24.11	4.64
BSE MidCap	46105	0.93	2.44	17.25	0.10
BSE LargeCap	9613	0.85	-0.10	10.73	3.94
Sectoral indices					
BSE IT	38407	1.50	2.70	7.75	8.17
BSE Oil & Gas	27493	1.22	0.31	-0.55	-7.15
BSE FMCG	20162	0.48	-3.10	4.37	-2.67
BSE Auto	52378	0.10	-2.39	6.58	-10.22
BSE Bankex	63031	0.74	0.10	17.78	10.84
BSE Teck	18441	1.35	2.42	14.46	11.09
BSE Capital Goods	70337	0.82	2.07	15.41	-3.98
BSE Consumer Durable	57708	1.05	-3.13	10.39	-3.00

Turnover (Rs Cr)	16-June	13-June
BSE Cash	6742	6974
NSE Cash	91121	104982
NSE F&O	11816923	9962246

Rs. Cr (Equity)	FII Inv 13-June	MF Inv 12-June	DII Inv 16-June
Buy	15,143	17,454	13,764
Sell	15,516	9,264	8,156
Net	-374	8,190	5,608
Net (MTD)	-772	28,503	49,758
Net (YTD)	-92,915	220,198	327,389

	16-June	1Day	Month ago	Year ago
USD	86.02	86.10	85.57	83.56
GBP	116.75	116.56	114.03	106.18
Euro	99.40	99.32	95.96	89.30
100 Yen	59.67	59.99	58.90	53.19

Indian markets

- Indian equity benchmarks ended higher on Monday due to buying at the lower level following easing inflation data. Markets rose further amid hopes of easing Middle East tensions following reports of US President Donald Trump mediating between Middle Eastern countries.
- The top gainers were Bharat Electronics, SBI Life Insurance, UltraTechCement, HDFC Life and ONGC, up 2.10-2.45%.
- The top losers were Tata Motors, Dr Reddys Labs, Adani Ports and Sun Pharma down 0.15-3.57%.

Indian debt

- The interbank call money rate ended lower at 4.90% on Monday compared to 5.0% on Friday.
- Government bond prices ended higher on Monday due to short covering at a lower level.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.27% on Monday compared to 6.29% on Friday.

Indian Rupee

- The rupee ended higher against the United States (US) dollar on Monday, tracking positive trends in the domestic equity market, weakness in the dollar index and easing global crude prices.

Regulatory

- The Reserve Bank of India issued draft regulations for Rupee Interest Rate Derivatives to align the extant regulatory framework with the market and other related developments.
- As per RBI data, Systemic credit growth has declined to the lowest in three years at 8.97% year-on-year (YoY) in the fortnight ended 30 May.
- In a government switch auction conducted on June 16, 2025 for a notified amount of Rs 25,000 crore, the Reserve Bank accepted about Rs 9,296 crore.
- The National Company Law Tribunal (NCLT) has approved Meesho's plan to relocate its headquarters from Delaware to India.

Economy and Government

- India's wholesale prices-based inflation (WPI) eased further to a 14-month low of 0.39% in May on an annual basis as against 0.85% in April
- India's merchandise trade deficit in May stood at \$21.88 billion compared to \$26.42 billion in April. On a yearly basis, the trade deficit narrowed slightly compared to \$22.09 billion recorded in May 2024.
- India's unemployment rate rose to 5.6% in May 2025, up from 5.1% in April.
- The Gujarat government is accelerating the development of residential infrastructure in Dholera to support the upcoming Rs 91,000 crore semiconductor fabrication plant by the Tata Group.

Domestic Debt Market Indicators

Instrument	16-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.90%	5.00%	5.45%	5.87%	6.24%	6.75%
3-Month T-Bill	5.35%	5.35%	5.76%	6.46%	6.93%	6.84%
6-Month T-Bill	5.43%	5.42%	5.77%	6.59%	7.04%	6.97%
1-year T-Bill	5.50%	5.50%	5.74%	6.51%	7.07%	6.98%
3-Month CD	5.88%	5.86%	6.40%	7.54%	7.55%	7.10%
6-Month CD	6.15%	6.15%	6.60%	7.69%	7.37%	7.42%
1-year CD	6.34%	6.34%	6.60%	7.59%	7.62%	7.65%
3-Month CP	6.30%	6.25%	6.75%	7.86%	8.15%	7.77%
6-Month CP	6.58%	6.58%	6.94%	8.00%	7.71%	7.90%
1-year CP	6.67%	6.77%	7.02%	7.85%	8.10%	7.95%
1-year Gilt	5.56%	5.60%	5.81%	6.58%	7.14%	7.00%
3-year Gilt	5.83%	5.84%	5.88%	6.58%	7.16%	6.99%
5-year Gilt	5.97%	5.99%	5.95%	6.60%	7.05%	7.00%
1-year AAA	6.68%	6.68%	6.68%	7.57%	7.70%	7.68%
3-year AAA	6.80%	6.80%	6.75%	7.38%	7.70%	7.63%
5-year AAA	6.86%	6.86%	6.87%	7.34%	7.70%	7.56%
10-year G-sec	6.28%	6.30%	6.27%	6.70%	7.05%	6.98%
Net LAF (Rs Cr)	279831	278898	249809	-154917	-73145	-55327
Forex reserves (\$ bn)	696.66	691.49	690.62	638.70	642.49	655.82

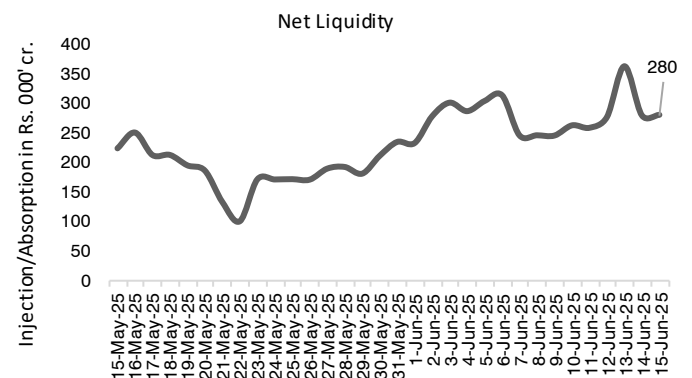
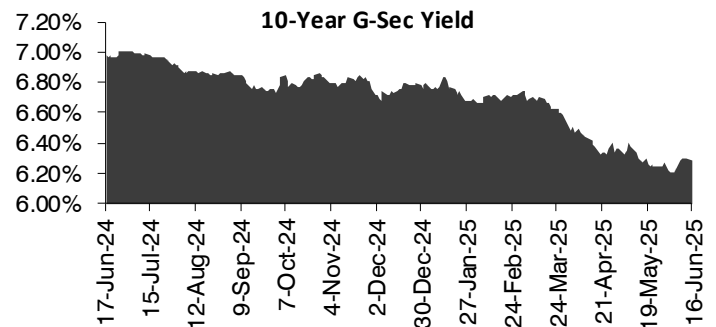
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.43	6.45	7.16	7.20	8.43	8.96
1 Year	5.56	6.68	7.39	7.43	8.66	9.19
3 Year	5.83	6.80	7.51	7.55	8.78	9.31
5 Year	5.97	6.86	7.67	7.70	8.94	9.47
10 Year	6.28	6.93	7.74	7.77	9.01	9.54

Rs. Cr (Debt)	FII Inv 13-June	MF Inv 12-June
Buy	568	15,000
Sell	295	13,916
Net	273	1,084
Net (MTD)	-961	-12,107
Net (YTD)	504	-308,044

Economic Indicators	Latest	Quarter	Year Ago
CPI	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)
WPI	0.39% (May-25)	2.45% (Feb-25)	2.74% (May-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

- Reliance Industries sold 85 lakh shares of Asian Paints for Rs 1,876 crore through an open market transaction.
- TC's announced the completion of its acquisition of Sresta Natural Bioproducts Private Ltd (SNBPL) for a total consideration of up to Rs 472.5 crore.
- Omaxe to invest over Rs 1,000 crore in developing a new integrated township in Amritsar, Punjab.
- State Bank of India (SBI) has reduced fixed deposit (FD) interest rates by 25 basis points (bps) across all regular FD scheme tenures and savings account interest rates by up to 50 bps.
- NTPC to raise up to Rs 18,000 crore via the issuance of non-convertible debentures, subject to shareholder approval.
- Zee Entertainment Enterprise Ltd (ZEEL) plans to raise Rs 2,237.44 crore from promoter group entities
- Waterways Leisure Tourism, operator of Cordelia Cruises, has filed its Draft Red Herring Prospectus (DRHP) with SEBI to raise Rs 727 crore through an initial public offering (IPO).
- Nissan plans to cut stake in Renault to 10%, looks to raise \$640 mn



Global market indices	16-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	42515.09	0.75	-0.33	6.80	10.17
Nikkei 225	38311.33	1.26	1.48	-4.62	-1.30
FTSE	8875.22	0.28	2.20	11.60	8.94
Hang Seng	24060.99	0.70	3.07	45.46	34.11
Taiwan	22049.9	-0.10	0.94	9.45	-2.02

Global debt	16-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.46	4.41	4.43	4.31	4.21	4.20
UK 10-Year (%)	4.54	4.56	4.64	4.67	3.98	4.08
German 10-Year (%)	2.53	2.54	2.59	2.87	2.29	2.36
Japan 10-Year (%)	1.46	1.40	1.45	1.50	0.71	0.92

Domestic	16-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	99373	0.32	7.66	47.76	38.28
Silver (Rs / Kg)	106700	0.50	12.78	43.94	21.48
Aluminium (Rs / Kg)	244	0.58	1.63	17.14	3.75
Copper (Rs / kg)	883	0.86	2.96	16.27	4.04
Lead (Rs / kg)	183	-1.54	0.33	1.08	-4.50
Zinc (Rs /Kg)	255	0.55	-2.45	16.89	-2.54
Nickel (Rs / kg)	1328	0.77	-1.67	-6.58	-10.01

Global	16-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	3433.47	1.60	6.48	1.60	47.22
Silver (oz/\$)	3632.00	0.25	11.69	0.25	22.91
Brent (\$/bbl)	73.23	-1.35	11.96	-1.35	-11.37
NYMEX crude (\$/bbl)	71.77	-1.66	14.85	-1.66	-8.51

Global markets

- Wall Street stocks ended higher on Monday due to fall in oil prices which eased concerns about the potential for higher energy prices to stoke inflation.
- 10-year US bond yield ended lower at 4.46% as Middle East tensions showed little sign of abating.
- FTSE index closed up on Monday on easing Middle East tensions following reports that Iran is seeking an end to hostilities with Israel.
- Asian markets were trading mixed at 8.30 AM.
- US New York Empire State Manufacturing Index dropped to -16 in June 2025 from -9.2 in May.

Commodity

- Crude oil prices fell \$1.21 to \$71.77 a barrel on the NYMEX on reports of Iran seeks truce with Isarel.
- OPEC said it expected the global economy to remain resilient in the second half of this year despite concerns about trade conflicts and trimmed its forecast for growth in oil supply from producers outside the wider OPEC+ group in 2026.
- Domestic gold prices ended higher on safe haven demand following Middle East tensions.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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%
June 21	US Fed Balance Sheet Jun/18	\$6.68T

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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