Daily Market Monitor

June 30, 2025

TATA mutual fund

Domestic Market Performance

Indian market indices	27-June	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25638	0.35	3.27	14.83	6.63
BSE Sensex	84059	0.36	3.07	14.13	6.08
BSE 100	26841	0.42	3.15	15.23	5.67
BSE 200	11614	0.44	3.02	15.00	4.60
BSE 500	37061	0.45	3.31	15.66	4.10
BSE SmallCap	54249	0.54	4.60	25.68	4.64
BSE MidCap	46541	0.38	2.99	18.36	1.25
BSE LargeCap	9865	0.44	3.12	13.63	4.69
Sectoral indices					
BSE IT	38060	-0.24	2.79	6.78	3.07
BSE Oil & Gas	27920	1.21	2.42	1.00	-3.84
BSE FMCG	20293	0.14	-1.91	5.05	-0.98
BSE Auto	53759	0.30	1.55	9.39	-6.21
BSE Bankex	64556	0.39	2.87	20.63	7.11
BSE Teck	18751	-0.02	4.58	16.39	8.78
BSE Capital Goods	71549	0.83	1.97	17.40	-1.49
BSE Consumer Durable	59534	0.40	1.33	13.88	1.36

Turnover (Rs Cr)	27-June	26-June
BSE Cash	7248	6822
NSE Cash	153035	118580
NSE F&O	9526159	68851376

Rs. Cr (Equity)	FII Inv 26-June	MF Inv 25-June	DII Inv 27-June
Buy	29,759	9,187	40,672
Sell	19,096	7,850	41,438
Net	10,663	1,337	-766
Net (MTD)	13,919	52,046	63,578
Net (YTD)	-78,224	243,741	341,209

	27-June	1Day	Month ago	Year ago
USD	85.56	85.75	85.32	83.46
GBP	117.55	117.51	115.74	105.56
Euro	100.20	100.14	97.13	89.28
100 Yen	59.30	59.33	59.59	52.00

Indian markets

- Indian equity benchmarks ended higher on Friday, supported by easing geopolitical tensions in the Middle East and optimism around progress in trade talks between the US and India.
- The top gainers were Jio Financial, Asian Paints, Apollo Hospitals, IndusInd Bank and Adani Enterprises, up 2.32-3.50%.
- The top losers were TATA Consumer Products, Dr Reddy's Laboratories, Trent, Wipro and Eternal, down 1.25-1.84%.

Indian debt

- The interbank call money rate ended lower at 5.05% on Friday compared to 5.30% on Thursday.
- Government bond prices ended marginally lower on Friday following lower-than-expected cut-off prices in weekly debt sale conducted by RBI.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.31% on Friday compared to 6.28% on Thursday.

Indian Rupee

- The rupee ended higher against the US dollar on Friday owing to weakness in the dollar index and easing global crude oil prices.

Regulatory

- The Reserve Bank of India (RBI) issued final guidelines for the due diligence of operators managing Aadhaar Enabled Payment System (AePS) touchpoints, aimed at streamlining their onboarding process and strengthening fraud risk management.
- The Securities and Exchange Board of India (Sebi) has revised the minimum information that companies must provide to their audit committees and shareholders for the approval of related party transactions (RPTs). The new standards will come into effect from September 1.

Economy and Government

- India's current account balance recorded a surplus of $13.5 billion or 1.3% of GDP in Q4 FY25 as against a deficit of $11.3 billion or 1.1% of GDP in Q3FY25.
- National Statistics Office (NSO) data showed that the Gross Value of Output (GVO) from the agriculture and allied sector increased 54.6 per cent during FY12 to FY24 to Rs 29.49 lakh crore at constant prices.
- RBI data showed India's external debt increased by 10% to $736.3 billion at the end of March 2025 compared to $668.8 billion in the year-ago period.
- Bihar government has launched the Bihar State Bridge Maintenance Policy 2025, a first-of-its-kind state-level framework for systematic bridge upkeep.
- The Employees' State Insurance Corporation approved the second phase of the scheme to promote registration of employers or employees (SPREE scheme) while giving its go ahead to the amnesty scheme 2025 allowing one-time dispute resolution.
- The Ministry of Power announced the launch of a task force to conceive the India Energy Stack (IES), an initiative aimed at creating a unified, secure, and interoperable digital public infrastructure (DPI) for the energy sector.

Domestic Debt Market Indicators

Instrument	27-June	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.05%	5.30%	5.45%	6.35%	6.24%	5.75%
3-Month T-Bill	5.40%	5.39%	5.63%	6.53%	6.93%	6.83%
6-Month T-Bill	5.53%	5.52%	5.65%	6.52%	7.04%	6.91%
1-year T-Bill	5.53%	5.53%	5.63%	6.43%	7.07%	6.95%
3-Month CD	5.92%	5.88%	6.15%	7.51%	7.55%	7.20%
6-Month CD	6.13%	6.13%	6.49%	7.40%	7.37%	7.50%
1-year CD	6.33%	6.35%	6.51%	7.30%	7.62%	7.64%
3-Month CP	6.30%	6.25%	6.50%	7.90%	8.15%	7.80%
6-Month CP	6.54%	6.54%	6.85%	7.75%	7.71%	7.90%
1-year CP	6.78%	6.78%	6.87%	7.60%	8.10%	7.95%
1-year Gilt	5.62%	5.62%	5.70%	6.48%	7.14%	6.96%
3-year Gilt	5.93%	5.91%	5.76%	6.48%	7.16%	6.97%
5-year Gilt	6.03%	6.03%	5.85%	6.49%	7.05%	7.02%
1-year AAA	6.58%	6.58%	6.56%	7.32%	7.70%	7.68%
3-year AAA	6.60%	6.60%	6.60%	7.14%	7.70%	7.62%
5-year AAA	6.72%	6.72%	6.72%	7.14%	7.70%	7.55%
10-year G-sec	6.31%	6.27%	6.25%	6.60%	7.05%	7.00%
Net LAF (Rs Cr)	271041	247550	188510	-13030	-73145	-92651
Forex reserves ($ bn)	697.94	698.95	685.73	654.27	642.49	652.90

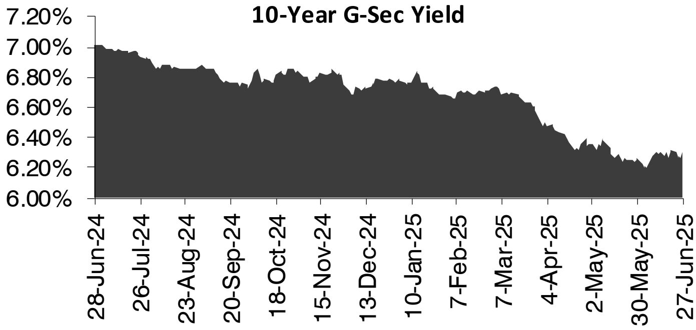
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.53	6.45	7.16	7.20	8.43	8.96
1 Year	5.62	6.58	7.29	7.33	8.56	9.09
3 Year	5.92	6.60	7.31	7.35	8.58	9.11
5 Year	6.03	6.72	7.53	7.56	8.80	9.33
10 Year	6.31	6.92	7.73	7.76	9.00	9.53

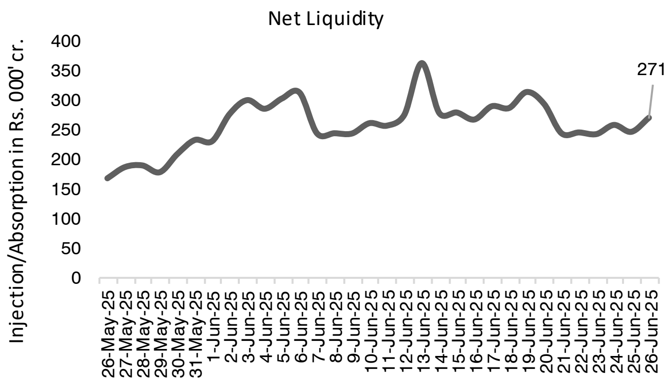
Rs. Cr (Debt)	FII Inv 26-June	MF Inv 25-June
Buy	1,857	10,383
Sell	1,242	9,797
Net	614	587
Net (MTD)	183	-26,698
Net (YTD)	1,647	-322,636

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*	58.4 (Jun-25)	58.1 (Mar-25)	58.3 (Jun-24)
India Service PMI*	60.7 (Jun-25)	58.5 (Mar-25)	60.5 (Jun-24)

Capital markets

- Credila Financial Services has filed a UDRHP-I with SEBI to raise Rs 5,000 crore through an IPO.
- Meesho has received shareholders' approval to raise up to Rs 4,250 crore through an initial public offering.
- Rayzon Solar plans to raise Rs 1,500 crore through its maiden public issue comprising entire fresh issue and no offer for sale.
- Curefoods filed its draft red herring prospectus for an IPO, comprising a fresh issue of Rs 800 crore.
- Wakefit has filed the draft red herring prospectus (DRHP) for its initial public offering (IPO) to raise Rs 468 crore in fresh issue.
- Jio BlackRock Broking Pvt Ltd. has received approval from SEBI to commence operations as a brokerage firm in India.





Global market indices	27-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	43819.27	1.00	3.48	10.08	11.89
Nikkei 225	40150.79	1.43	6.43	-0.04	2.06
FTSE	8798.91	0.72	0.24	10.64	7.57
Hang Seng	24284.15	-0.17	3.86	46.81	37.07
Taiwan	22580.08	0.39	5.83	12.08	-1.42

Global debt	27-June	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.29	4.26	4.43	4.38	4.21	4.29
UK 10-Year (%)	4.50	4.47	4.67	4.79	3.98	4.13
German 10-Year (%)	2.60	2.56	2.53	2.77	2.29	2.45
Japan 10-Year (%)	1.43	1.42	1.48	1.56	0.71	1.06

Domestic	27-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	95784	-1.42	0.66	42.43	34.17
Silver (Rs / Kg)	105193	-1.83	8.98	41.91	20.85
Aluminium (Rs / Kg)	248	-0.34	4.49	19.21	7.24
Copper (Rs / kg)	895	0.24	3.51	17.85	6.56
Lead (Rs / kg)	186	0.65	2.62	3.04	-5.65
Zinc (Rs /Kg)	262	0.34	0.92	20.06	-2.71
Nickel (Rs / kg)	1328	-0.49	-0.46	-6.60	-8.43

Global	27-June	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/$)	3333.51	0.07	-0.22	0.07	45.04
Silver (oz/$)	3670.00	1.35	9.72	1.35	27.79
Brent ($/bbl)	67.77	0.06	5.74	0.06	-21.55
NYMEX crude ($/bbl)	65.52	0.43	7.60	0.43	-19.84

Upcoming market indicators

Date	Indicator	Previous
June 30	US Dallas Fed Manufacturing Index, June	-15.3
June 30	India Government Budget Value, May	INR-1863.3B
July 1	US JOLTs Job Openings, May	7.391M
July 1	US Dallas Fed Services Index, June	-10.1
July 2	US ADP Employment Change, June	37K

Global markets

- Wall Street stocks ended higher on Friday as upbeat earnings results of major tech companies renewed confidence around artificial intelligence and as latest PCE inflation data boosted Fed rate cut hopes.
- 10-year US bond yield ended higher at 4.29% following unexpected inflation uptick.
- FTSE index ended higher on Friday buoyed by gains in financial and healthcare sectors amid easing US-China trade tensions and worries around geopolitical tensions.
- Asian markets were trading higher at 8.30 AM.
- US headline annual PCE inflation accelerated to 2.3% in May 2025 from an upwardly revised 2.2% in April while core PCE inflation rose by 2.7% from 2.6%.
- Eurozone Consumer Confidence indicator edged down by 0.2 points to -15.3 in June 2025 compared to -15.1 in May 2025.
- Eurozone Consumer inflation expectations decreased to 21.2 in June 2025 compared to 23.6 in May 2025.
- China official NBS Manufacturing PMI increased to 49.7 in June 2025 compared to 49.5 in May 2025 while the official NBS Non-Manufacturing PMI edged up to 50.5 from 50.3.
- China NBS Composite PMI Output Index inched up to 50.7 in June 2025 compared to 50.4 in May 2025.
- Japan Industrial Production decreased 1.80% in May 2025 compared to a rise of 0.50% in April 2025.

Commodity

- Crude oil prices rose 28 cents to $65.52 a barrel on the NYMEX on demand hopes after the US confirm readiness to sign trade deals with China.
- Domestic gold prices ended lower due to profit booking at the higher level amid easing geopolitical tensions.

Forthcoming results

NA	NA

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
Debt Indicators	Repo rate	6.00%	6.00%	6.25%	6.25%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
Debt Indicators	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%
Debt Indicators	Call rate	5.75%	6.00%	7.00%	6.50%	6.65%	6.00%	6.70%	5.75%	6.24%	6.50%
Debt Indicators	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%
Sector update	Auto – Two-wheelers	NA	-16.7%	11.4%	-9.0%	2.1%	-8.8%	-1.1%	14.2%	15.8%	9.6%
Sector update	Auto – Commercial vehicles	NA	-2.1%	-1.0%	-3.3%	0.6%	3.4%	-5.3%	0.8%	-22.02%	-11.63%
Sector update	Auto – Tractors	NA	7.7%	25.4%	13.6%	11.4%	14.0%	-1.3%	22.4%	3.7%	-5.8%
Sector update	Banks – Deposit growth	10.00%	10.20%	10.60%	10.60%	10.8%	11.50%	11.20%	11.80%	11.60%	10.90%
Sector update	Banks – Credit growth	9.80%	10.30%	11.80%	11.30%	11.5%	11.28%	11.20%	11.70%	13.00%	13.50%
Sector update	Infra – Coal	NA	3.5%	1.6%	1.7%	4.6%	5.3%	7.50%	7.80%	2.60%	-8.10%
Sector update	Infra – Electricity	NA	1.0%	6.2%	3.6%	2.4%	6.2%	4.40%	2.00%	-0.50%	-3.70%
Sector update	Infra – Steel	NA	3.0%	7.1%	6.9%	4.7%	7.3%	10.5%	5.70%	1.80%	4.10%
Sector update	Infra – Cement	NA	6.7%	11.6%	10.8%	14.6%	10.3%	13.10%	3.10%	7.20%	-2.50%