

Indian Indices	June 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81119	-0.70	9.87	5.61	22.69
Nifty 50	24719	-0.68	10.36	5.64	22.22
BSE Mid cap	45681	-0.32	16.94	0.35	36.92
Nifty Midcap	58227	-0.37	20.99	6.54	32.73
Nifty Smallcap	18375	-0.49	23.34	2.61	32.26
BSE SmallCap	53370	-0.30	21.72	5.31	33.08

Source: BSE, NSE

Indian Indices	June 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52324	-0.33	13.14	-9.18
BSE Bankex	62570	-1.01	13.12	10.26
BSE CD	57110	-0.49	7.97	-2.67
BSE CG	69767	-0.01	20.80	-3.22
BSE FMCG	20066	-0.94	6.62	-2.95
BSE Healthcare	43995	0.08	11.96	18.83
BSE IT	37839	-0.09	6.90	5.79
BSE Metal	30747	-0.81	3.37	-8.01
BSE Oil & Gas	27162	-0.57	14.83	-7.81
BSE Power	6725	-0.75	9.36	-14.14
BSE Realty	7821	0.13	25.59	-10.50

Source: BSE, NSE

Global Indices	June 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	42198	-1.79	3.39	9.19
Nasdaq	19407	-1.30	12.16	9.84
FTSE 100	8851	-0.39	3.61	8.41
Nikkei 225	37834	-0.89	2.84	-2.29
Hang Seng	23893	-0.59	1.83	31.91

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 12	MF Inv June 11	DII Inv June 13
Buy	12662	9044	13488
Sell	15938	8752	10446
Net	-3276	293	3041
Net (YTD)	-92541	211076	321781

Source: NSDL, NSE

Debt Market Indicators	June 13	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.00%
10 Yr Gilt^	6.30%	6.29%
91-day T-bill^	5.35%	5.37%
182-day T Bill^	5.42%	5.43%
364-day T Bill^	5.50%	5.50%
3-mth CP rate	6.25%	6.22%
6-mth CP rate	6.58%	6.55%
1-yr CP rate	6.77%	6.69%
3-mth CD rate	5.86%	5.80%
6-mth CD rate	6.15%	6.16%
12-mth CD rate	6.34%	6.34%
5 yr Corp Bond	6.86%	6.83%
Net LAF o/s (Rs Cr)*	-285659	-267414
M3 supply (Rs lakh Cr)**	276.51	277.66
G-sec Volume (Rs Cr)	57490	69390
SDF*	285659	267414
1 Year OIS	5.53%	5.53%
US 10-year Treasury Yield	4.41%	4.36%

\*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

\*\* May 30 and May 16 respectively

## Indian Equity

- 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%.

## Global Equity

- Wall Street stocks closed lower on Friday as escalating geopolitical tensions dampening investor confidence.
- FTSE index closed lower on Friday as gains in energy sector were offset by rising Middle East tensions.
- Strait Times Index closed marginally lower on Friday, tracking a sell-off in the global equity market due to escalating tensions in the Middle East.
- Nikkei Index closed lower on Friday as tensions in the Middle East escalated.
- Hang Seng Index closed lower on Friday on account of rising geopolitical tensions in the Middle East.
- At 8.30 AM in the morning, Asian Markets were trading mixed.

## 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.

## Capital Market

- 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).

## 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.

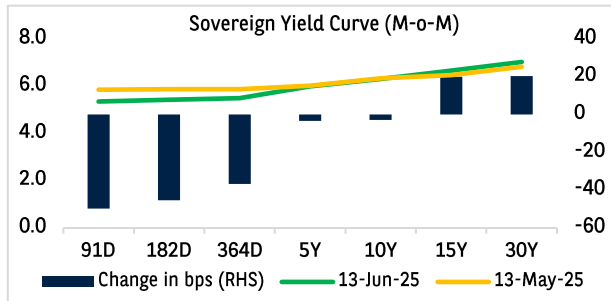
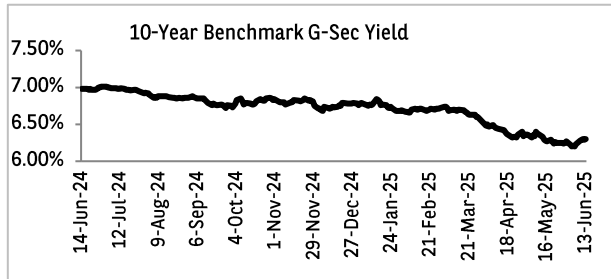
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,43,000	4,57,000

Source: RBI

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

G-sec and corporate bonds data as of **June 13**

\* Weighted average yields; Source: CRISIL



## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	June 13	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 13	June 12
Monthly Inflation (CPI)	2.82% (Apr-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent Crude Oil (\$/bbl)	74.23	69.36	69.88	82.75	USD	86.10	85.54
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	NYMEX Crude Oil (\$/bbl)	72.98	68.04	66.55	78.62	GBP	116.56	116.01
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	Gold (Rs / 10 gm)#	99058	97455	86843	71513	Euro	99.32	98.55
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	# ibjbrates spot prices					100 Yen	59.99	59.52
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	696.66	691.49
									Dollar Index	98.14	97.92

Source: CRISIL, Mospi, Financial Websites

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## International

- 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.

## Commodities

- Crude oil prices rose \$4.94 to \$72.98 a barrel on the NYMEX as escalating geopolitical tensions raised concerns of supply disruptions.