

Indian Indices	June 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81796	0.84	10.79	6.24	22.88
Nifty 50	24947	0.92	11.38	6.31	22.42
BSE Mid cap	46105	0.93	18.03	0.10	37.27
Nifty Midcap	58769	0.93	22.12	6.41	33.04
Nifty Smallcap	18549	0.95	24.51	2.80	32.57
BSE SmallCap	53573	0.38	22.19	4.64	33.20

Source: BSE, NSE

Indian Indices	June 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52378	0.10	13.26	-10.22
BSE Bankex	63031	0.74	13.95	10.84
BSE CD	57708	1.05	9.10	-3.00
BSE CG	70337	0.82	21.78	-3.98
BSE FMCG	20162	0.48	7.13	-2.67
BSE Healthcare	44177	0.41	12.42	18.42
BSE IT	38407	1.50	8.51	8.17
BSE Metal	31028	0.91	4.32	-7.64
BSE Oil & Gas	27493	1.22	16.23	-7.15
BSE Power	6764	0.58	10.00	-14.39
BSE Realty	7916	1.21	27.11	-10.26

Source: BSE, NSE

Global Indices	June 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	42515	0.75	2.48	10.17
Nasdaq	19701	1.52	10.97	11.38
FTSE 100	8875	0.28	2.81	8.94
Nikkei 225	38311	1.26	3.40	-1.30
Hang Seng	24061	0.70	0.42	34.11

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 13	MF Inv June 12	DII Inv June 16
Buy	15143	17454	13764
Sell	15516	9264	8156
Net	-374	8190	5608
Net (YTD)	-92915	220198	327389

Source: NSDL, NSE

Debt Market Indicators	June 16	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.90%	5.00%
10 Yr Gilt^	6.28%	6.30%
91-day T-bill^	5.35%	5.35%
182-day T Bill^	5.43%	5.42%
364-day T Bill^	5.50%	5.50%
3-mth CP rate	6.30%	6.25%
6-mth CP rate	6.58%	6.58%
1-yr CP rate	6.67%	6.77%
3-mth CD rate	5.88%	5.86%
6-mth CD rate	6.15%	6.15%
12-mth CD rate	6.34%	6.34%
5 yr Corp Bond	6.86%	6.86%
Net LAF o/s (Rs Cr)*	-290584	-289611
M3 supply (Rs lakh Cr)**	279.35	276.51
G-sec Volume (Rs Cr)	58955	57490
SDF*	290584	289611
1 Year OIS	5.52%	5.53%
US 10-year Treasury Yield	4.46%	4.41%

*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 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%.

Global Equity

- 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.
- FTSE index closed up on Monday on easing Middle East tensions following reports that Iran is seeking an end to hostilities with Israel.
- Strait Times Index closed marginally lower on Monday due to escalating geopolitical tensions in the Middle East.
- Nikkei Index closed higher on Monday due to weakness in the yen and intermittent fall in global crude prices.
- Hang Seng Index closed higher on Monday, as mixed economic data from China boosted hopes for a stronger policy stimulus.
- At 8.30 AM, Asian Markets were trading mixed.

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.

Capital Market

- 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).

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.

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.

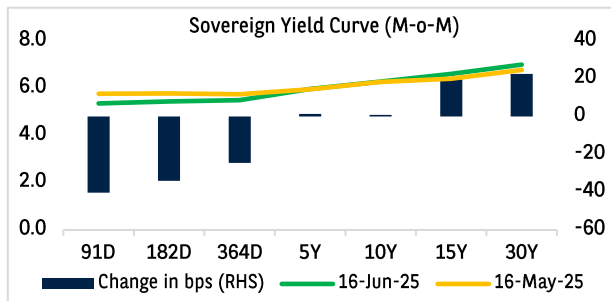
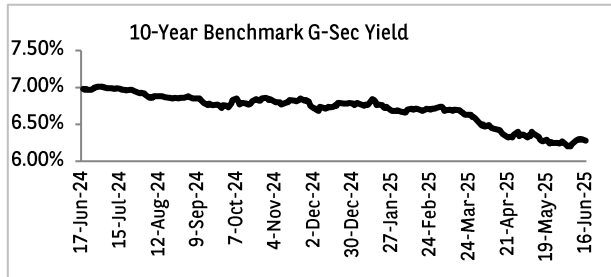
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,43,000	4,57,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.43	6.45	7.16	7.20	8.43	8.96
1-Yr	5.56	6.68	7.39	7.43	8.66	9.19
3-Yr	5.83	6.80	7.51	7.55	8.78	9.31
5-Yr	5.97	6.86	7.67	7.70	8.94	9.47
10-Yr	6.28	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 16	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 16	June 13
Monthly Inflation (CPI)	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent Crude Oil (\$/bbl)	73.23	74.23	70.58	82.62	USD	86.02	86.10
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	NYMEX Crude Oil (\$/bbl)	71.77	72.98	67.18	78.45	GBP	116.75	116.56
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	Gold (Rs / 10 gm)#	99373	99058	86843	71866	Euro	99.40	99.32
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	# ibjbrates spot prices					100 Yen	59.67	59.99
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	696.66	691.49
									Dollar Index	98.24	98.14

Source: CRISIL, Mospi, Financial Websites

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