

Indian Indices	June 17	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81583	-0.26	10.00	5.96	22.82
Nifty 50	24853	-0.37	10.42	5.91	22.34
BSE Mid cap	45846	-0.56	16.47	-0.46	37.06
Nifty Midcap	58379	-0.66	20.46	5.71	32.82
Nifty Smallcap	18420	-0.69	23.06	2.09	32.34
BSE SmallCap	53213	-0.67	21.40	3.93	32.98

Source: BSE, NSE

Indian Indices	June 17	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52082	-0.56	11.72	-10.72
BSE Bankex	62867	-0.26	12.85	10.56
BSE CD	57346	-0.63	8.05	-3.61
BSE CG	70181	-0.22	20.96	-4.20
BSE FMCG	20099	-0.31	7.02	-2.97
BSE Healthcare	43374	-1.82	9.16	16.27
BSE IT	38654	0.64	9.10	8.87
BSE Metal	30629	-1.29	2.04	-8.83
BSE Oil & Gas	27241	-0.92	15.05	-8.00
BSE Power	6747	-0.26	9.20	-14.61
BSE Realty	7865	-0.64	26.75	-10.83

Source: BSE, NSE

Global Indices	June 17	1D % Chg	3M % Chg	1Y % Chg
DJIA	42216	-0.70	0.89	8.87
Nasdaq	19521	-0.91	9.62	9.32
FTSE 100	8834	-0.46	1.77	8.50
Nikkei 225	38537	0.59	3.05	1.14
Hang Seng	23980	-0.34	-0.68	33.70

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 16	MF Inv June 13	DII Inv June 17
Buy	10315	10107	18733
Sell	12962	8329	10936
Net	-2647	1778	7797
Net (YTD)	-95562	221976	335186

Source: NSDL, NSE

Debt Market Indicators	June 17	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.95%	4.90%
10 Yr Gilt^	6.26%	6.28%
91-day T-bill^	5.36%	5.35%
182-day T Bill^	5.43%	5.43%
364-day T Bill^	5.49%	5.50%
3-mth CP rate	6.24%	6.30%
6-mth CP rate	6.52%	6.58%
1-yr CP rate	6.70%	6.67%
3-mth CD rate	5.87%	5.88%
6-mth CD rate	6.15%	6.15%
12-mth CD rate	6.34%	6.34%
5 yr Corp Bond	6.81%	6.86%
Net LAF o/s (Rs Cr)*	-277831	-290584
M3 supply (Rs lakh Cr)**	279.35	276.51
G-sec Volume (Rs Cr)	66415	58955
SDF*	277831	290584
1 Year OIS	5.47%	5.52%
US 10-year Treasury Yield	4.39%	4.46%

*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 lower on Tuesday due to rising concerns over geopolitical uncertainties in the Middle East after the US President called for the immediate evacuation of Tehran. Pharma stocks declined the most on tariff threats from the US.
- The top losers were Adani Enterprises, Dr. Reddys Labs, Sun Pharma, Eternal and ONGC, down 1.74%-2.18%.
- The top gainers were Tech Mahindra, Infosys, Asian Paints, TCS and Maruti Suzuki, up 0.52-1.46%.

Global Equity

- Wall Street stocks closed lower on Tuesday as investors were cautious due to escalating geopolitical tensions.
- FTSE index closed lower on Tuesday amid rising geopolitical tensions ahead of key central bank rate decisions.
- Strait Times Index closed higher on Tuesday, tracking the rally in US stocks, as investors looked past a sharp fall in domestic exports.
- Nikkei Index closed higher on Tuesday, tracking overnight Wall Street gains, following signs of a potential easing of geopolitical uncertainties in the Middle East.
- Hang Seng Index closed lower on Tuesday, due to global inflation risk following geopolitical uncertainties in the Middle East.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended higher at 4.95% on Tuesday compared to 4.90% on Monday.
- Government bond prices were little changed as traders awaited key developments this week, including commentary from Indian and U.S. central banks.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.26% on Tuesday compared to 6.27% on Monday.

Capital Market

- Sebi gave approval to three companies -- Vipul Shah-backed Sunshine Pictures, Gujarat-based M&B Engineering, and power infrastructure firm Lumino Industries -- to raise funds via initial public offerings (IPOs).
- The National Stock Exchange (NSE) has received Sebi's approval to shift its expiry day to Tuesday for equity derivatives contracts, while the BSE has been assigned Thursday as its expiry day.
- MakeMyTrip is planning to raise \$3 billion through equity and debt sale
- Saswat Finance has raised \$2.6 million in a funding round led by early-stage investor Ankur Capital, with existing backer Incubate Fund Asia participating.

Regulatory

- The Reserve Bank of India released draft guidelines to govern rupee interest rate derivatives (IRD) transactions in India, with an aim to reduce compliance burden.
- RBI Governor Sanjay Malhotra said the central bank may have room for further interest rate cuts if inflation turns out to be lower than expected
- SEBI directed portfolio managers to immediately take down any promotional material that violates its code of conduct.

Economy and Government

- Karnataka govt launches AI workforce impact study to guide new IT policy 2025.
- The Bihar Cabinet has approved a memorandum of understanding (MoU) between the Airports Authority of India (AAI) and the state government for the development of six small airports under the 'Ude Desh ka Aam Nagrik' (UDAN) scheme.

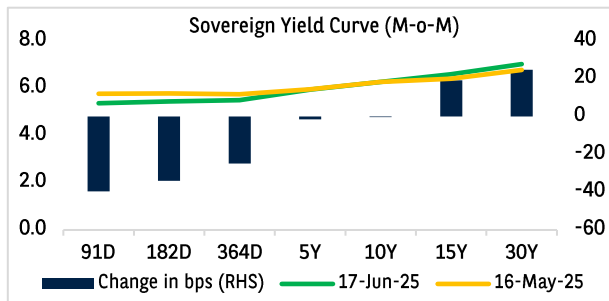
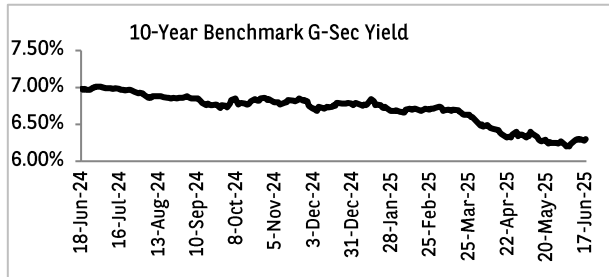
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,43,000	4,57,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.43	6.48	7.19	7.23	8.46	8.99
1-Yr	5.56	6.63	7.34	7.38	8.61	9.14
3-Yr	5.82	6.75	7.46	7.50	8.73	9.26
5-Yr	5.94	6.81	7.62	7.65	8.89	9.42
10-Yr	6.26	6.90	7.71	7.74	8.98	9.51

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 17	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 17	June 16
Monthly Inflation (CPI)	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent Crude Oil (\$/bbl)	76.45	73.23	71.07	84.25	USD	86.10	86.02
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	NYMEX Crude Oil (\$/bbl)	74.84	71.77	67.58	80.33	GBP	116.85	116.75
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	Gold (Rs / 10 gm)#	99147	99373	88101	71866	Euro	99.59	99.40
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	# ibjbrates spot prices					100 Yen	59.47	59.67
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	696.66	691.49
									Dollar Index	98.73	98.00

Source: CRISIL, Mospi, Financial Websites

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International

- US Industrial Production increased 0.6% on year in May, the smallest gain so far this year, following a downwardly revised 1.4% rise in April.
- US Manufacturing Production increased 0.5% on year in May, following a downwardly revised 1.1% rise in April.
- US export prices rose 1.7% on year in May, the least in six months, easing from a downwardly revised 1.9% advance in April while import prices rose 0.2% on year vs 0.1%.
- US retail trade growth slowed to 3.3% on year in May from a downwardly revised 5.0% in the previous month.
- The Bank of Japan kept its key short-term interest rate unchanged at 0.5% during its June meeting.
- Japan Trade Deficit decreased significantly to JPY 637.61 billion in May 2025 from JPY 1,225.17 billion in the same month last year.
- Japan Machinery Orders fell 9.1% to ¥919 billion in April 2025 compared to 13% surge in March 2025.

Commodities

- Crude oil prices rose \$3.07 to \$74.84 a barrel on the NYMEX as rising Israel-Iran tensions escalated supply concerns.