

Indian Indices	June 18	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81445	-0.17	8.16	5.36	22.82
Nifty 50	24812	-0.17	8.66	5.32	22.30
BSE Mid cap	45691	-0.34	13.69	-1.22	37.06
Nifty Midcap	58109	-0.46	17.35	4.72	32.66
Nifty Smallcap	18378	-0.23	19.54	0.77	32.27
BSE SmallCap	53034	-0.34	17.77	2.59	32.98

Source: BSE, NSE

Indian Indices	June 18	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52274	0.37	9.49	-10.36
BSE Bankex	62884	0.03	10.69	9.67
BSE CD	57774	0.75	6.13	-4.10
BSE CG	69847	-0.48	17.51	-5.34
BSE FMCG	20005	-0.47	5.01	-3.37
BSE Healthcare	43146	-0.52	6.60	16.20
BSE IT	38361	-0.76	6.78	7.43
BSE Metal	30431	-0.65	-0.52	-9.24
BSE Oil & Gas	27114	-0.47	13.52	-8.36
BSE Power	6701	-0.67	6.07	-15.79
BSE Realty	7829	-0.46	22.55	-13.08

Source: BSE, NSE

Global Indices	June 18	1D % Chg	3M % Chg	1Y % Chg
DJIA	42172	-0.10	1.42	8.59
Nasdaq	19546	0.13	11.67	8.78
FTSE 100	8843	0.11	1.59	7.96
Nikkei 225	38885	0.90	2.75	1.05
Hang Seng	23711	-1.12	-4.16	32.35

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 17	MF Inv June 16	DII Inv June 18
Buy	14984	11306	11093
Sell	12196	5634	10140
Net	2788	5672	953
Net (YTD)	-92774	227648	336138

Source: NSDL, NSE

Debt Market Indicators	June 18	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.10%	4.95%
10 Yr Gilt^	6.26%	6.26%
91-day T-bill^	5.35%	5.36%
182-day T Bill^	5.44%	5.43%
364-day T Bill^	5.49%	5.49%
3-mth CP rate	6.22%	6.24%
6-mth CP rate	6.61%	6.52%
1-yr CP rate	6.68%	6.70%
3-mth CD rate	5.90%	5.87%
6-mth CD rate	6.15%	6.15%
12-mth CD rate	6.32%	6.34%
5 yr Corp Bond	6.81%	6.81%
Net LAF o/s (Rs Cr)*	-299971	-277831
M3 supply (Rs lakh Cr)**	279.35	276.51
G-sec Volume (Rs Cr)	51665	66415
SDF*	299971	277831
1 Year OIS	5.47%	5.47%
US 10-year Treasury Yield	4.38%	4.39%

*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 Wednesday dragged down by IT and financial stocks amid rising turbulence in the Middle East and higher oil prices.
- The top losers were TCS, Adani Ports, HUL, JSW Steel and Adani Enterprises, down 1.18-1.82%.
- The top gainers were IndusInd Bank, Trent, Titan Company, Maruti Suzuki and Mahindra & Mahindra, up 1.13-5.11%.

Global Equity

- Wall Street stocks ended mixed on Wednesday with Nasdaq gaining after the Fed's decision to keep interest rates unchanged while Dow Jones declined amid escalating Middle East tensions.
- FTSE index closed higher on Wednesday driven by gains in banking stocks supported by final UK inflation data ahead of the central bank meetings.
- Strait Times Index closed lower on Wednesday as investors remained cautious ahead of the US Federal Reserve's policy decisions due this week.
- Nikkei Index closed higher on Wednesday, led by gains in the share of exporters following weakness in the yen.
- Hang Seng Index closed lower on Wednesday, pressured by rising geopolitical uncertainties in the Middle East, which fuelled investors' concerns over potential oil supply disruptions.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended higher at 5.10% on Wednesday compared to 4.95% on Tuesday.
- Government bond prices ended flat on Wednesday as investors remained on the sidelines amid uncertainty ahead of the US Fed Policy decision
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.26% on Wednesday.

Capital Market

- Sattva Group and Blackstone raised Rs 1,400 crore from investors ahead of its maiden REIT public issue.
- ESAF Small Finance Bank received board's approval to sell Rs 735.18 crore worth of NPAs and written-off loans to an Asset Reconstruction Company (ARC).
- Physis Capital raised over Rs 200 crore for its maiden fund.
- MakeMyTrip plans to raise over \$2.5 billion through the sale of ordinary shares and convertible bonds.

Regulatory

- RBI said supervisory Data Quality Index of commercial banks has improved to 89.3 in March 2025 compared to 88.6 in the year-ago period.
- The Securities and Exchange Board of India (Sebi) introduced special delisting route for PSUs with 90% or more government holding.
- Sebi approved changes to allow them to retain employee stock options (ESOPs) granted at least one year prior to filing a draft red herring prospectus (DRHP).
- SEBI approved the use of liquid mutual funds and overnight funds for compliance with deposit requirements mandated for investment advisors and research analyst.
- Sebi permitted co-investment opportunities in the unlisted securities under the AIF framework, as well as cleared the proposal to do away with prohibition on AIF investment managers from providing advisory services in listed securities.

Economy and Government

- Union Minister Jitendra Singh announced that central government employees under the Unified Pension Scheme (UPS) will now receive retirement and death gratuity benefits, aligning them with the Old Pension Scheme (OPS).
- Union Finance Minister Nirmala Sitharaman said India's financial future will be "phygital"—a blend of physical and digital services, emphasising the convergence of physical and digital financial experiences.

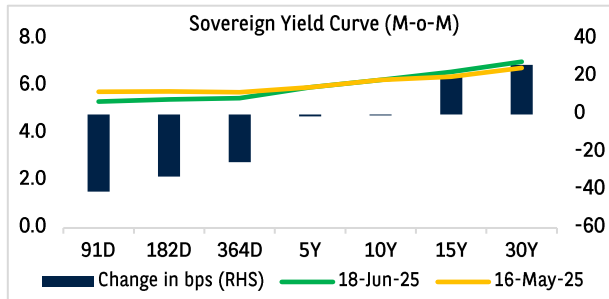
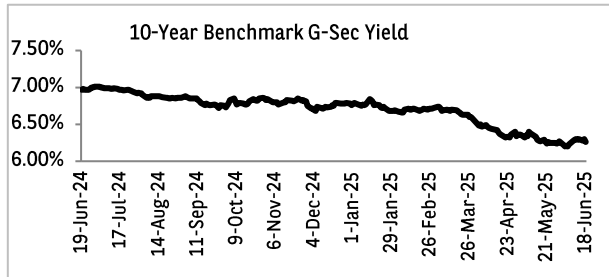
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,43,000	4,57,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.44	6.43	7.14	7.18	8.41	8.94
1-Yr	5.57	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 18**

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	June 18	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 18	June 17
Monthly Inflation (CPI)	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent	76.7	76.45	70.56	85.33	USD	86.30	86.10
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	Crude Oil (\$/bbl)	75.14	74.84	66.9	81.57	GBP	116.18	116.85
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	NYMEX Crude Oil (\$/bbl)	75.14	74.84	66.9	81.57	Euro	99.34	99.59
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	Gold (Rs / 10 gm)#	99454	99147	88354	71285	100 Yen	59.53	59.47
				# ibjbrates spot prices					Forex Reserve (\$ bn)*	696.66	691.49
				Source: Financial Websites, IBJA					Dollar Index	99.06	98.82

Source: CRISIL, Mospi, Financial Websites

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International

- The Federal Reserve left the federal funds rate unchanged at 4.25%–4.50% for a fourth consecutive meeting in June 2025, as policymakers take a cautious stance to fully evaluate the economic impact of President's policies, particularly those related to tariffs, immigration, and taxation.
- US Initial jobless claims inched lower by 5,000 from the previous week to 245,000 on the period ending June 14th.
- Eurozone annual inflation eased down to 1.9% in May 2025, compared to 2.2% in April 2025 while the annual core inflation rate fell to 2.3% from 2.7%.
- UK annual inflation rate edged down to 3.4% in May 2025 compared to 3.5% in April 2025 while the annual core inflation rate eased to 3.5% from 3.8%.
- UK Retail Price Index advanced by 4.3% in May 2025, compared to a 4.5% growth in April.

Commodities

- Crude oil prices rose 30 cents to \$75.14 a barrel on the NYMEX due to risks of supply disruptions from Middle East conflict.