

Indian Indices	June 19	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81362	-0.10	7.84	5.20	22.75
Nifty 50	24793	-0.08	8.23	5.43	22.29
BSE Mid cap	44941	-1.64	9.33	-1.95	34.46
Nifty Midcap	57160	-1.63	12.48	4.02	32.13
Nifty Smallcap	18013	-1.99	14.39	-0.78	31.63
BSE SmallCap	52094	-1.77	13.22	1.36	30.39

Source: BSE, NSE

Indian Indices	June 19	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52494	0.42	9.55	-8.80
BSE Bankex	62690	-0.31	9.71	7.22
BSE CD	57164	-1.06	3.57	-2.76
BSE CG	69447	-0.57	14.28	-3.82
BSE FMCG	19920	-0.42	5.02	-2.96
BSE Healthcare	42750	-0.92	4.31	16.06
BSE IT	37923	-1.14	6.44	5.80
BSE Metal	30072	-1.18	-3.06	-9.18
BSE Oil & Gas	26891	-0.82	11.28	-7.29
BSE Power	6618	-1.24	2.40	-15.25
BSE Realty	7701	-1.63	17.32	-11.87

Source: BSE, NSE

Global Indices	June 19	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	8792	-0.58	0.98	7.15
Nikkei 225	38488	-1.02	1.95	-0.21
Hang Seng	23238	-1.99	-6.19	26.08

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 18	MF Inv June 16	DII Inv June 19
Buy	11210	11306	10710
Sell	11808	5634	10345
Net	-598	5672	366
Net (YTD)	-93371	227648	336504

Source: NSDL, NSE

Debt Market Indicators	June 19	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.90%	5.10%
10 Yr Gilt^	6.31%	6.26%
91-day T-bill^	5.34%	5.35%
182-day T Bill^	5.44%	5.44%
364-day T Bill^	5.46%	5.49%
3-mth CP rate	6.25%	6.22%
6-mth CP rate	6.61%	6.61%
1-yr CP rate	6.68%	6.68%
3-mth CD rate	5.90%	5.90%
6-mth CD rate	6.15%	6.15%
12-mth CD rate	6.33%	6.32%
5 yr Corp Bond	6.84%	6.81%
Net LAF o/s (Rs Cr)*	-296073	-299971
M3 supply (Rs lakh Cr)**	279.35	276.51
G-sec Volume (Rs Cr)	61455	51665
SDF*	296073	299971
1 Year OIS	5.52%	5.47%
US 10-year Treasury Yield	NA	4.38%

\*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 closed marginally lower on Thursday as the Fed's hawkish remarks dampened investor sentiment and due to geopolitical uncertainties.
- The top losers were Adani Ports, Bajaj Finance, Adani Enterprises, Tech Mahindra and Coal India, which were down 1.56-2.52%.
- The top gainers were Tata Consumer Products, Eicher Motors, Mahindra & Mahindra, Wipro and Apollo Hospital, which were up 1.10-2.17%.

## Global Equity

- FTSE index closed lower on Thursday as the Bank of England held rates steady and ongoing Middle East tensions.
- Strait Times Index closed lower on Thursday after the Fed raised concerns over inflation.
- Nikkei Index closed lower on Thursday amid caution over geopolitical uncertainties.
- Hang Seng Index closed lower on Thursday due to concerns over global growth amid rising oil prices and the Fed flagging an inflation risk, driven by the US tariffs.
- At 8.30 AM in the morning, Asian Markets were trading mixed.

## Indian Debt

- The interbank call money rate ended lower at 4.90% on Thursday compared to 5.10% on Wednesday.
- Government bond prices ended lower on Thursday due to surging crude oil prices and caution ahead of the scheduled debt auction.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.31% on Thursday compared to 6.26% on Wednesday.

## Capital Market

- Dhunseri to invest Rs 2,240 crore to expand plastic film capacity by 2029.
- Amazon plans to invest more than Rs 2000 cr (\$233 million) in India in 2025 to expand and update its operations infrastructure, develop new technology for its fulfilment network and improve delivery safety.
- Puravankara bagged a Rs 272 crore contract for a residential project.
- Uno Minda will invest about Rs 210 crore to set up a manufacturing facility of its casting division at Aurangabad in Maharashtra.
- Aavas Financiers board approved raising Rs 200 crore via NCDs.
- Capillary Technologies India files DRHP with SEBI aims to raise Rs 430 crore.

## Regulatory

- The Reserve Bank (RBI) issued RBI (Project Finance) Directions 2025 asking Regulated Entities (REs) to maintain general provision of 1.25% for under construction Commercial Real Estate (CRE) loans and 1% for infrastructure projects under construction.
- SEBI has put on hold its earlier proposal to require structural independence of clearing corporations from stock exchanges, citing feasibility issues.

## Economy and Government

- The Ministry of Civil Aviation has released new draft rules to tighten control over structures that pose a risk to aircraft safety.
- The government has imposed import curbs on certain colloidal precious metals, with an aim to check the illegal inflow of gold into India in liquid form.
- The Central government launched the Gender Budgeting Knowledge Hub, a dedicated digital platform aimed at strengthening gender-responsive planning across India.
- Commerce and Industry Minister Piyush Goyal stated India is prioritizing strong trade agreements with developed nations, citing deals with the UK, Australia, UAE, and EFTA.

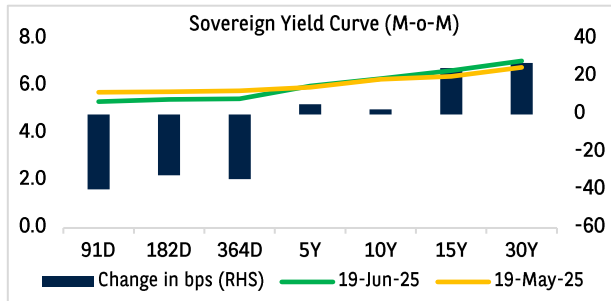
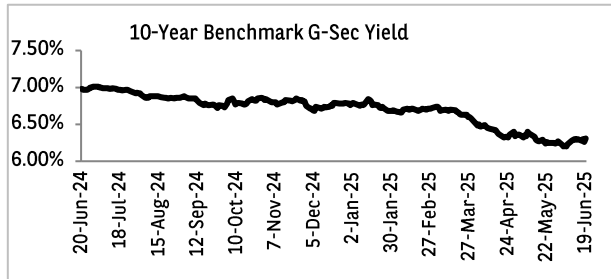
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,43,000	4,57,000

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	5.58	6.66	7.37	7.41	8.64	9.17
3-Yr	5.85	6.78	7.49	7.53	8.76	9.29
5-Yr	6.00	6.84	7.65	7.68	8.92	9.45
10-Yr	6.31	6.93	7.74	7.77	9.01	9.54

G-sec and corporate bonds data as of **June 19**

\* Weighted average yields; Source: CRISIL



## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	June 19	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 19	June 18
Monthly Inflation (CPI)	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent Crude Oil (\$/bbl)	78.85	76.7	70.78	85.07	USD	86.70	86.30
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	NYMEX Crude Oil (\$/bbl)	Closed	75.14	67.16	81.57	GBP	116.16	116.18
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	Gold (Rs / 10 gm)#	99261	99454	88649	71704	Euro	99.34	99.34
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	# ibjbrates spot prices					100 Yen	59.69	59.53
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	696.66	691.49
									Dollar Index	98.67	98.91

Source: CRISIL, Mospi, Financial Websites

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