

Indian Indices	June 20	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82408	1.29	7.94	6.36	23.05
Nifty 50	25112	1.29	8.29	6.56	22.57
BSE Mid cap	45480	1.20	9.96	-1.32	34.88
Nifty Midcap	57996	1.46	13.40	4.55	32.59
Nifty Smallcap	18194	1.01	14.73	-0.40	31.94
BSE SmallCap	52379	0.55	13.02	0.91	30.56

Source: BSE, NSE

Indian Indices	June 20	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52934	0.84	8.95	-7.37
BSE Bankex	63412	1.15	10.27	7.80
BSE CD	57642	0.84	3.36	-1.70
BSE CG	70243	1.15	14.61	-3.08
BSE FMCG	20023	0.52	4.39	-2.55
BSE Healthcare	43082	0.78	3.87	17.03
BSE IT	38172	0.65	5.79	6.31
BSE Metal	30402	1.10	-2.91	-9.87
BSE Oil & Gas	27054	0.61	10.23	-7.47
BSE Power	6712	1.43	3.64	-14.03
BSE Realty	7872	2.22	18.61	-11.66

Source: BSE, NSE

Global Indices	June 20	1D % Chg	3M % Chg	1Y % Chg
DJIA	42207	0.08	0.60	7.85
Nasdaq	19447	-0.51	9.92	9.74
FTSE 100	8775	-0.20	0.83	6.07
Nikkei 225	38403	-0.22	1.73	-0.59
Hang Seng	23530	1.26	-2.85	28.33

Source: Financial websites

Rs. Cr (Equity)	FII Inv June 19	MF Inv June 18	DII Inv June 20
Buy	13557	8215	22652
Sell	11517	8121	26310
Net	2040	95	-3658
Net (YTD)	-91331	234115	332846

Source: NSDL, NSE

Debt Market Indicators	June 20	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.30%	4.90%
10 Yr Gilt^	6.32%	6.31%
91-day T-bill^	5.34%	5.34%
182-day T Bill^	5.43%	5.44%
364-day T Bill^	5.47%	5.46%
3-mth CP rate	6.23%	6.25%
6-mth CP rate	6.61%	6.61%
1-yr CP rate	6.76%	6.68%
3-mth CD rate	5.86%	5.90%
6-mth CD rate	6.14%	6.15%
12-mth CD rate	6.33%	6.33%
5 yr Corp Bond	6.88%	6.84%
Net LAF o/s (Rs Cr)*	-322568	-296073
M3 supply (Rs lakh Cr)**	279.35	279.35
G-sec Volume (Rs Cr)	56310	61455
SDF*	322568	296073
1 Year OIS	5.52%	5.52%
US 10-year Treasury Yield	4.38%	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 ended higher on Friday, buoyed by the Reserve Bank of India's decision to relax provisioning norms for project financing. However, increasing uncertainties in the Middle East limited the gains.
- The top gainers were Jio Financial, Bharti Airtel, Trent, Mahindra & Mahindra and Bharat Electronics, up 2.43-3.57%.
- The top losers were Bajaj Auto, Hero Motocorp, Maruti Suzuki, and Dr Reddys Labs, down 0.06-1.47%.

Global Equity

- Wall Street stocks ended mixed on Friday with Dow Jones rose due to sector specific gains while Nasdaq declined amid rising Middle East tensions.
- FTSE index closed lower on Friday as global risk aversion spiked due to Middle East tensions and global rate decisions.
- Strait Times Index closed lower on Friday, weighed down by worries over the US's involvement in the uncertainties in the Middle East.
- Nikkei Index closed lower on Friday, as geopolitical uncertainties weighed on investors sentiments.
- Hang Seng Index closed higher on Friday after China's central bank kept policy rates unchanged, boosting hopes for an economic recovery.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended higher at 5.30% on Friday compared to 4.90% on Thursday.
- Government bond prices ended flat on Friday as rising oil prices outweighed RBI's dovish cues with focus on the Iran-Israel conflict.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.31% on Friday.

Capital Market

- Bharti Enterprises plans to invest €31.4 million in Eutelsat as part of a €1.35 billion capital raising plan to reduce debt and invest in satellite constellations.
- Nuvoco Vistas completes Rs 1800 cr Vadraj cement acquisition.
- MakeMyTrip raised \$3.1 billion to slash Chinese firm Trip.com's stake to 20%.
- Samvardhana Motherson International Ltd (SAMIL) plans to raise up to Rs 2,500 crore through non-convertible debentures (NCDs) for financing capital expenditure (capex), acquisition-related requirements and refinance existing debt.

Regulatory

- The Reserve Bank of India reduced the mandated portion of lending that small finance banks have to extend to priority sectors such as agriculture and small businesses, lowering it by 15 percentage points.
- SEBI released a consultation paper proposing a 5-point regulatory framework for the responsible use of AI and ML in India's securities markets.

Economy and Government

- India core sector output increased 0.70% in May of 2025 compared to 0.50% in April 2025.
- RBI's policy minutes showed India's monetary policymakers used a benign inflation outlook to frontload rate cuts and send a 'clear signal' to productive sectors to boost growth.
- Prime Minister Narendra Modi launched 28 development projects worth more than Rs 5,900 crore in Bihar's Siwan district.
- The Central Board of Direct Taxes (CBDT) has exempted payments made by finance companies, fund management entities, recognised clearing corporations and stock exchanges to International Financial Services Centre units from deducting tax at source (TDS), effective July 1.
- India's gross direct tax collection for the financial year 2025-26 rose by 4.86% to Rs 5.45 lakh crore as of June 19.

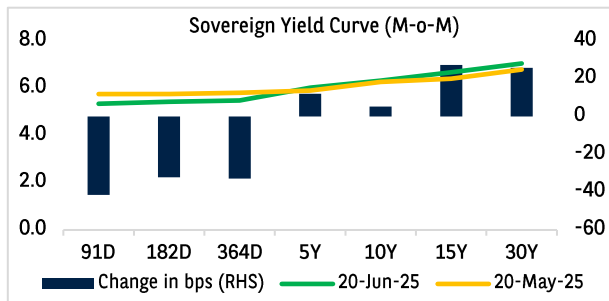
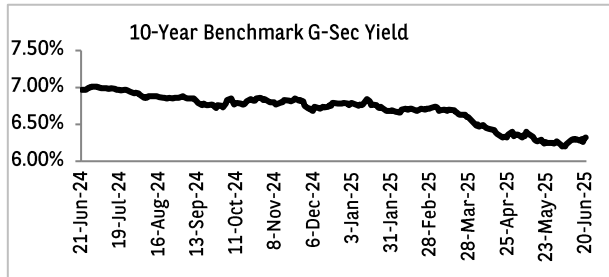
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	3,70,000	4,30,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.43	6.43	7.14	7.18	8.41	8.94
1-Yr	5.55	6.70	7.41	7.45	8.68	9.21
3-Yr	5.86	6.82	7.53	7.57	8.80	9.33
5-Yr	6.02	6.88	7.69	7.72	8.96	9.49
10-Yr	6.32	6.93	7.74	7.77	9.01	9.54

G-sec and corporate bonds data as of **June 20**

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	June 20	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	June 20	June 19
Monthly Inflation (CPI)	2.82% (May-25)	3.61% (Feb-25)	4.80% (May-24)	London Brent Crude Oil (\$/bbl)	77.01	78.85	72	85.71	USD	86.61	86.70
IIP	2.7% (Apr-25)	5.0% (Jan-25)	5.0% (Apr-24)	NYMEX Crude Oil (\$/bbl)	73.84	75.14	68.07	82.17	GBP	116.68	116.16
GDP	7.4% (Jan-Mar FY25)	6.4% (Oct-Dec FY25)	9.5% (Jan-Mar FY24)	Gold (Rs / 10 gm)#	98691	99261	88506	72162	Euro	99.76	99.34
GST Collection (in Rs cr)	201,050 (May-25)	183,646 (Feb-25)	172,739 (May-24)	# ibjbrates spot prices					100 Yen	59.58	59.69
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	698.95	696.66
									Dollar Index	98.77	98.67

Source: CRISIL, Mospi, Financial Websites

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International

- US Philadelphia Fed Manufacturing Index held steady at -4.0 in June 2025, matching the previous month's reading.
- UK Retail sales dropped by 1.3% in May 2025 compared to a 5% rise in April 2025.
- Japan Jibun Bank Flash Manufacturing PMI increased to 50.4 in June 2025 compared to 49.4 in May 2025 while the Jibun Bank Flash Services PMI rose to 51.5 from a final 51.0 and the Jibun Bank Flash Composite PMI edged up to 51.4 from a final 50.2.

Commodities

- Crude oil prices fell \$1.30 to \$73.84 a barrel on the NYMEX as new US sanctions on Iran eased fears of conflict escalation.