

Broad Indices	June 2	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81374	-0.09	11.17	10.02	22.76
Nifty 50	24717	-0.14	11.71	9.70	22.29
BSE Mid cap	45396	0.58	17.63	5.94	36.69
Nifty Midcap 100	57776	0.62	20.58	11.74	33.05

Sectoral Indices	June 2	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52319	0.00	14.08	-1.33
BSE Bankex	63283	0.20	15.37	13.47
BSE CD	57712	-0.40	8.96	5.09
BSE CG	71211	0.17	28.91	1.65
BSE FMCG	20439	0.65	11.19	4.66
BSE Healthcare	42649	0.10	11.61	22.24
BSE IT	36682	-0.57	0.01	10.49
BSE Metal	30582	-0.58	9.20	-6.51
BSE Oil & Gas	26994	-0.13	19.58	-5.75
BSE Power	6829	0.35	18.49	-11.31
BSE Realty	7535	2.38	21.70	-5.58

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Ports	2.46	Hero Motocorp	-1.79
M&M	1.65	Tech Mahindra	-1.58
TATA Cons. Prod	1.27	JSW Steel	-1.48
Eternal	1.21	HDFC Life	-1.31
Power Grid Corp	1.14	Tata Steel	-1.23

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv May 30	MF Inv May 29	DII Inv June 2
Buy	51943	20545	14470
Sell	56947	18879	9156
Net	-5004	1667	5314
Net (YTD)	-92143	184501	282945

Policy rates	June 2	1W Ago	M Ago	3M Ago
Repo (%)	6.00	6.00	6.00	6.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	June 2	1W Ago	M Ago	3M Ago
Call (%)	5.45	5.85	5.85	6.50
10 Yr Gilt(%)^	6.22	6.25	6.36	6.72
TREP (%)	5.45	5.75	6.00	6.80
Short-term debt	June 2	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.43	6.49	6.80	7.73
6-month CPs (%)	6.86	6.92	6.99	7.88
3-month CDs (%)	6.08	6.15	6.52	7.48
6-month CDs (%)	6.39	6.52	6.66	7.60
182-day T-bill (%)^	5.62	5.66	5.93	6.54
364-day T-bill (%)^	5.61	5.67	5.89	6.53
Long-term debt	June 2	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.73	5.75	6.04	6.59
5-Y G-sec (%)	5.85	5.84	6.09	6.68
10-Y G-sec (%)	6.22	6.25	6.36	6.72

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended slightly lower on Monday, owing to losses in the IT and metal sectors, triggered by US tariff concerns, which more than offset strong domestic growth data.
- The top losers were Hero MotoCorp, Tech Mahindra, JSW Steel, HDFC Life and Tata Steel, down 1.23-1.79%.
- The top gainers were Adani Ports, Mahindra & Mahindra, Tata Consumer Products, Eternal and Power Grid Corporation, up 1.14-2.46%.

Indian Debt

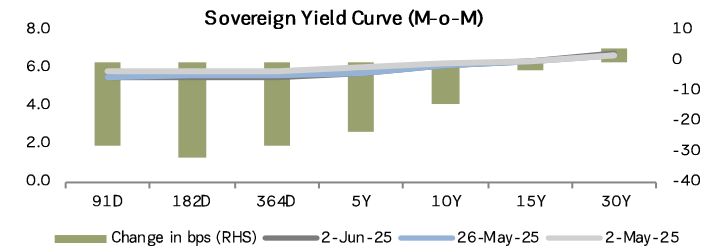
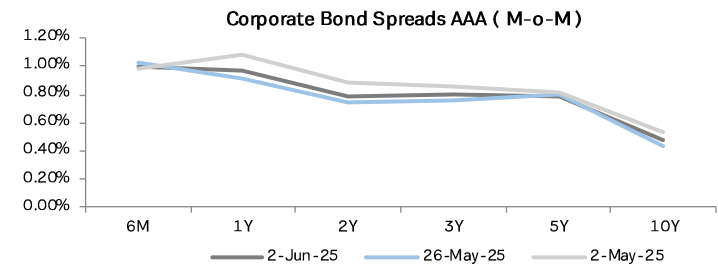
- The interbank call money rate ended lower at 5.45% on Monday compared to 5.75% on Friday.
- Government bond prices ended higher on Monday as investors are waiting for RBI's monetary policy decision due later this week.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.27% on Monday compared to 6.29% on Friday.
- Meanwhile, the yield of the 10-year benchmark of new 06.33% GS 2035 paper ended at 6.21% on Monday.

Economy and Government

- India HSBC Manufacturing PMI edged down to 57.6 in May 2025 compared to 58.2 in April 2025.
- India and Paraguay on Monday signed a Memorandum of Understanding (MoU) to establish a Joint Commission Mechanism (JCM).
- Karnataka inaugurated a solar-integrated EV charging station near Kempegowda International Airport, powered by second-life batteries for round-the-clock operation.
- Sebi tweaked the investor charter for investment advisers and research analysts to enhance financial inclusion and financial literacy.
- The IBBI notified amendments to the regulations governing corporate insolvency, aiming to streamline procedures, protect creditor interests, and encourage greater investor participation in resolution processes.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.65	6.58	7.31	7.34	8.58
3-Yr	5.73	6.62	7.35	7.38	8.62
5-Yr	5.85	6.73	7.56	7.59	8.84
10-Yr	6.22	6.80	7.63	7.66	8.91

* Weighted average yields



Global Indices	June 2	1D % Chg	3M % Chg	1Y % Chg
DJIA	42305	0.08	-3.50	9.36
Nasdaq	19243	0.67	2.10	14.98
FTSE 100	8774	0.02	-0.40	6.03
DAX	23931	-0.28	6.12	29.37
Nikkei 225	37471	-1.30	0.85	-2.64
Hang Seng	23158	-0.57	0.94	28.09
KOSPI	2699	0.05	6.56	2.37

Global 10 yr Sov. Yields (%)	June 2	1D Ago	3M Ago	1Y Ago
US	4.46	4.41	4.24	4.51
UK	4.66	4.64	4.48	4.37
German	2.52	2.51	2.39	2.66
Japan	1.51	1.50	1.36	1.05

Commodity Prices	June 2	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	64.63	62.78	72.81	81.93
NYMEX Crude Oil (\$/bbl)	62.52	60.79	69.76	76.99
Gold (Rs / 10 gm)#	96680	95355	85056	72356

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Currencies Vs INR	June 2	1D Ago	M Ago	3M Ago
USD	85.44	85.48	83.86	87.40
GBP	115.60	115.14	111.61	109.98
Euro	97.42	96.94	94.95	90.78
100 Yen	59.66	59.36	57.74	58.30
Forex Reserve (\$ bn)*	692.72	685.73	688.13	640.48

* Data pertains to May 9 and May 2 respectively Source: CRISIL

Key Macro Indicators	
CPI	3.16% (April-2025)
WPI	0.85% (April-2025)
IIP	2.70% (April -2025)
GDP Growth Rate	7.4% (Jan-Mar FY25)

Capital Market

- Udaan raised \$114 million in fresh equity funding as part of its Series G round.
- Sports tech startup KhiladiPro raised \$1 million in round led by Shastra VC, MGA Ventures.
- Godrej Properties Ltd acquired a 14-acre land in Pune to develop a housing project with a revenue potential of Rs 4,200 crore as part of its expansion plan.
- Realty firm Signature Global plans to invest around Rs 4,000 crore this fiscal to acquire land parcels and carry out construction activities in its housing projects at Gurugram.
- Emaar India plans to invest Rs 400 crore to develop a housing project in Lucknow as part of its expansion plan.
- Pepperfry secured Rs 43.3 crore in funding from existing investors like Norwest Venture Partners and Goldman Sachs.

Global Equity

- Wall Street stocks closed higher on Monday, as optimism over trade talks outweighed concerns from US President’s plan to double tariffs on imported steel and aluminum.
- 10-year US bond yield ended higher at 4.46% due to escalated trade tariff tensions.
- FTSE index ended flat on Monday, as losses in consumer staples and healthcare stocks offset gains in energy stocks due to escalating trade tensions.
- Asian markets were trading higher at 8.30 AM.

International

- US S&P Global US Manufacturing PMI increased to 52 in May 2025 compared to 50.2 in April 2025.
- US ISM Manufacturing PMI fell to 48.5 in May 2025 compared to 48.7 in April 2025.
- Eurozone HCOB Manufacturing PMI increased to 49.4 in May 2025, compared to 49.0 in April 2025.
- UK S&P Global Manufacturing PMI edged up to 46.4 in May 2025 compared to 45.4 in April 2025.
- UK Nationwide House Price Index rose by 3.5% in May 2025, compared to a 3.4% increase in April 2025.
- China Caixin General Manufacturing PMI declined to 48.3 in May 2025 compared to 50.4 April 2025.

Upcoming market indicators

- US JOLTs Job Openings April (June 3)
- US Factory Orders, April (June 3)
- Eurozone Inflation Rate Flash, May (June 3)
- US ADP Employment Change May (June 4)
- US S&P Global Composite/Services PMI Final May (June 4)
- US trade balance, April (June 5)
- US Initial Jobless Claims May /31 (June 5)
- Eurozone interest rate decision (June 5)
- US Balance of Trade, March (June 6)
- Eurozone HCOB Composite PMI Final/ Services PMI Final, April (June 6)
- Eurozone PPI, March (June 6)

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