

Broad Indices	June 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81796	0.84	10.79	6.24	22.88
Nifty 50	24947	0.92	11.38	6.31	22.42
BSE Mid cap	46105	0.93	18.03	0.10	37.27
Nifty Midcap 100	58769	0.93	22.12	6.41	33.04

Sectoral Indices	June 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52378	0.10	13.26	-10.22
BSE Bankex	63031	0.74	13.95	10.84
BSE CD	57708	1.05	9.10	-3.00
BSE CG	70337	0.82	21.78	-3.98
BSE FMCG	20162	0.48	7.13	-2.67
BSE Healthcare	44177	0.41	12.42	18.42
BSE IT	38407	1.50	8.51	8.17
BSE Metal	31028	0.91	4.32	-7.64
BSE Oil & Gas	27493	1.22	16.23	-7.15
BSE Power	6764	0.58	10.00	-14.39
BSE Realty	7916	1.21	27.11	-10.26

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Bharat Electronics	2.45	Tata Motors	-3.57
SBI Life Insura	2.43	Dr Reddys Labs	-1.15
UltraTechCement	2.41	Adani Ports	-0.31
HDFC Life	2.35	Sun Pharma	-0.15
ONGC	2.10	NA	NA

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv June 13	MF Inv June 12	DII Inv June 16
Buy	15143	17454	13764
Sell	15516	9264	8156
Net	-374	8190	5608
Net (YTD)	-92915	220198	327389

Policy rates	June 16	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	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 16	1W Ago	M Ago	3M Ago
Call (%)	4.90	4.90	5.45	5.87
10 Yr Gilt(%)^	6.28	6.28	6.27	6.70
TREP (%)	5.15	5.14	5.50	6.20
Short-term debt	June 16	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.30	6.15	6.75	7.86
6-month CPs (%)	6.58	6.39	6.94	8.00
3-month CDs (%)	5.88	5.72	6.40	7.54
6-month CDs (%)	6.15	6.00	6.60	7.69
182-day T-bill (%)^	5.43	5.35	5.77	6.59
364-day T-bill (%)^	5.50	5.40	5.74	6.51
Long-term debt	June 16	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.83	5.70	5.88	6.58
5-Y G-sec (%)	5.97	5.88	5.95	6.60
10-Y G-sec (%)	6.28	6.28	6.27	6.70

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Monday due to buying at the lower level following easing inflation data. Markets rose further amid hopes of easing Middle East tensions following reports of US President Donald Trump mediating between Middle Eastern countries.
- The top gainers were Bharat Electronics, SBI Life Insurance, UltraTechCement, HDFC Life and ONGC, up 2.10-2.45%.
- The top losers were Tata Motors, Dr Reddys Labs, Adani Ports and Sun Pharma down 0.15-3.57%.

Indian Debt

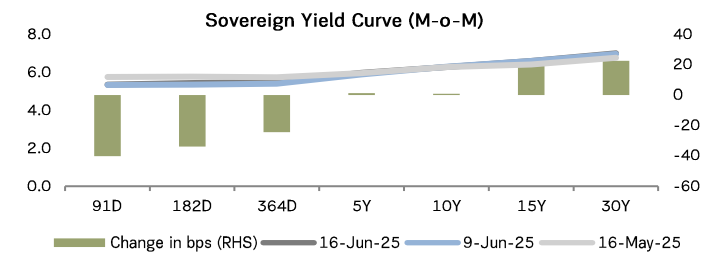
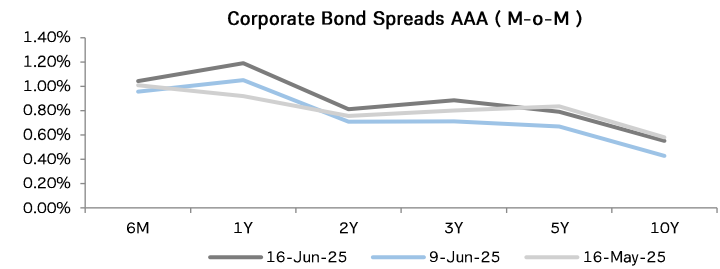
- The interbank call money rate ended lower at 4.90% on Monday compared to 5.0% on Friday.
- Government bond prices ended higher on Monday due to short covering at a lower level.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.27% on Monday compared to 6.29% on Friday.

Economy and Government

- India's wholesale prices-based inflation (WPI) eased further to a 14-month low of 0.39% in May on an annual basis as against 0.85% in April
- India's merchandise trade deficit in May stood at \$21.88 billion compared to \$26.42 billion in April. On a yearly basis, the trade deficit narrowed slightly compared to \$22.09 billion recorded in May 2024.
- India's unemployment rate rose to 5.6% in May 2025, up from 5.1% in April.
- The Gujarat government is accelerating the development of residential infrastructure in Dholera to support the upcoming Rs 91,000 crore semiconductor fabrication plant by the Tata Group
- The Reserve Bank of India issued draft regulations for Rupee Interest Rate Derivatives to align the extant regulatory framework with the market and other related developments.
- As per RBI data, Systemic credit growth has declined to the lowest in three years at 8.97% year-on-year (YoY) in the fortnight ended 30 May.
- In a government switch auction conducted on June 16, 2025 for a notified amount of Rs 25,000 crore, the Reserve Bank accepted about Rs 9,296 crore.
- The National Company Law Tribunal (NCLT) has approved Meesho's plan to relocate its headquarters from Delaware to India.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.56	6.68	7.39	7.43	8.66
3-Yr	5.83	6.80	7.51	7.55	8.78
5-Yr	5.97	6.86	7.67	7.70	8.94
10-Yr	6.28	6.93	7.74	7.77	9.01

* Weighted average yields



Global Indices	June 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	42515	0.75	2.48	10.17
Nasdaq	19701	1.52	10.97	11.38
FTSE 100	8875	0.28	2.81	8.94
DAX	23699	0.78	3.10	31.65
Nikkei 225	38311	1.26	3.40	-1.30
Hang Seng	24061	0.70	0.42	34.11
KOSPI	2947	1.80	14.82	6.82

Global 10 yr Sov. Yields (%)	June 16	1D Ago	3M Ago	1Y Ago
US	4.46	4.41	4.31	4.20
UK	4.543	4.56	4.67	4.08
German	2.5285	2.54	2.87	2.36
Japan	1.458	1.40	1.50	0.92

Commodity Prices	June 16	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	73.23	74.23	70.58	82.62
NYMEX Crude Oil (\$/bbl)	71.77	72.98	67.18	78.45
Gold (Rs / 10 gm)#	99373	99058	86843	71866

ibjarates spot prices

Currencies Vs INR	June 16	1D Ago	M Ago	3M Ago
USD	86.02	86.10	85.57	87.08
GBP	116.75	116.56	114.03	112.81
Euro	99.40	99.32	95.96	94.75
100 Yen	59.67	59.99	58.90	58.98
Forex Reserve (\$ bn)*	696.66	691.49	690.62	638.70

* Data pertains to June 6 and May 30 respectively Source: CRISIL

Key Macro Indicators	
CPI	2.82% (May-2025)
WPI	0.39% (May-2025)
IIP	2.70% (April -2025)
GDP Growth Rate	7.4% (Jan-Mar FY25)

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Capital Market

- State Bank of India (SBI) has reduced fixed deposit (FD) interest rates by 25 basis points (bps) across all regular FD scheme tenures and savings account interest rates by up to 50 bps.
- NTPC to raise up to Rs 18,000 crore via the issuance of non-convertible debentures, subject to shareholder approval.
- Zee Entertainment Enterprise Ltd (ZEEL) plans to raise Rs 2,237.44 crore from promoter group entities
- Waterways Leisure Tourism, operator of Cordelia Cruises, has filed its Draft Red Herring Prospectus (DRHP) with SEBI to raise Rs 727 crore through an initial public offering (IPO).
- Nissan plans to cut stake in Renault to 10%, looks to raise \$640 mn
- Reliance Industries sold 85 lakh shares of Asian Paints for Rs 1,876 crore through an open market transaction.

Global Equity

- Wall Street stocks ended higher on Monday due to fall in oil prices which eased concerns about the potential for higher energy prices to stoke inflation.
- 10-year US bond yield ended lower at 4.46% as Middle East tensions showed little sign of abating.
- FTSE index closed up on Monday on easing Middle East tensions following reports that Iran is seeking an end to hostilities with Israel
- Asian markets were trading mixed at 8.30 AM.

International

- US New York Empire State Manufacturing Index dropped to -16 in June 2025 from -9.2 in May.

Upcoming market indicators

- US Retail Sales May (June 17)
- US Industrial Production May (June 17)
- US Manufacturing Production May (June 17)
- US NAHB Housing Market Index June (June 17)
- US Fed Interest Rate Decision (June 18)
- US Building Permits Prel May (June 18)
- US Initial Jobless Claims June/14 (June 19)
- Eurozone Construction Output April (June 19)
- UK BoE Interest Rate Decision (June 19)
- US Philadelphia Fed Manufacturing Index June (June 20)
- US CB Leading Index May (June 20)