

Broad Indices	June 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81442	0.55	10.46	9.49	22.78
Nifty 50	24751	0.53	10.81	9.42	22.25
BSE Mid cap	45680	0.39	14.91	7.27	36.92
Nifty Midcap 100	58303	0.65	18.58	13.72	32.79

Sectoral Indices	June 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52308	-0.05	12.21	-4.90
BSE Bankex	62774	0.11	13.31	12.44
BSE CD	57651	0.09	5.81	3.88
BSE CG	71008	0.42	22.09	8.17
BSE FMCG	20437	0.26	9.70	-1.02
BSE Healthcare	43050	0.88	9.69	21.00
BSE IT	36687	0.35	-1.86	8.64
BSE Metal	30788	0.42	4.98	-4.15
BSE Oil & Gas	26875	-0.02	15.51	-1.78
BSE Power	6768	0.31	10.86	-7.40
BSE Realty	7704	1.79	20.24	-1.59

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Eternal	4.43	IndusInd Bank	-1.37
Dr Reddys Labs	3.09	TATA Cons. Prod	-1.11
Trent	3.02	Axis Bank	-1.02
Power Grid Corp	1.98	Bajaj Finserv	-0.62
ICICI Bank	1.66	Bajaj Finance	-0.59

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv June 4	MF Inv June 3	DII Inv June 5
Buy	17867	11895	13191
Sell	16262	7617	10809
Net	1605	4278	2382
Net (YTD)	-95938	199703	293802

Policy rates	June 5	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 5	1W Ago	M Ago	3M Ago
Call (%)	5.55	5.80	5.75	5.95
10 Yr Gilt(%)^	6.20	6.25	6.32	6.72
TREP (%)	5.67	5.75	5.89	6.00
Short-term debt	June 5	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.36	6.47	6.74	7.80
6-month CPs (%)	6.65	6.86	7.03	7.88
3-month CDs (%)	6.07	6.10	6.52	7.58
6-month CDs (%)	6.29	6.48	6.62	7.69
182-day T-bill (%)^	5.55	5.60	5.90	6.59
364-day T-bill (%)^	5.56	5.61	5.89	6.57
Long-term debt	June 5	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.71	5.72	6.02	6.58
5-Y G-sec (%)	5.84	5.84	6.07	6.63
10-Y G-sec (%)	6.20	6.25	6.32	6.72

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Thursday, led by gains in the pharmaceutical and realty stocks, supported by falling US yields, easing oil prices and foreign fund inflows.
- The top gainers were Eternal, Dr Reddy's Labs, Trent, Power Grid Corporation and ICICI Bank, which were up 1.66-4.43%.
- The top losers were IndusInd Bank, Tata Consumer Products, Axis Bank, Bajaj Finserv and Bajaj Finance, which were down 0.59-1.37%.

Indian Debt

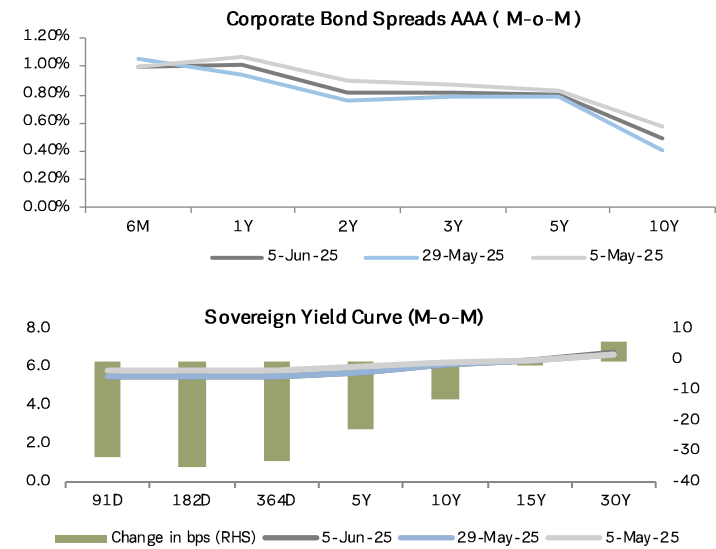
- The interbank call money rate ended higher at 5.55% on Thursday compared to 5.45% on Wednesday.
- Government bond prices were little changed on Thursday ahead of the RBI's monetary policy decision due on Friday.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.25% on Thursday compared to 6.26% on Wednesday.
- Meanwhile, the yield of the new 10-year benchmark 06.33% GS 2035 paper ended at 6.20% on Thursday compared to 6.21% on Wednesday.

Economy and Government

- Commerce and Industry Minister Piyush Goyal proposed to develop an industrial conclave for Italian businesses in India to promote investments.
- Finance Minister Nirmala Sitharaman and Kyrgyz Foreign Affairs Minister Zheenbek Kulubaev Moldokanovich signed a protocol for enforcement of a bilateral investment treaty to foster bilateral economic relations and encourage cross-border investments between the two nations.
- V Anantha Nageswaran, India's chief economic advisor said alternative data sources arising as the byproduct of everyday digital interactions can help policymakers in providing proactive intervention for economic growth
- The Centre has increased central deputation allowance for certain categories of officers.
- The Northern Railway said the Vande Bharat train service between Katra and Srinagar in Jammu and Kashmir will start commercial operations from June 7.
- The Khadi and Village Industries Commission (KVIC), under the Ministry of Micro, Small and Medium Enterprises (MSME) disbursed Rs 300 crore in margin money subsidy to 8,794 beneficiaries under the Prime Minister's Employment Generation Programme (PMEGP).
- RBI data showed private-sector banks had a sharper drop in loan growth in FY25 when overall growth moderated to 11.1%, from 15.3% the year before.
- SEBI came out with an operational framework for issuance of social bonds, sustainability bonds and sustainability-linked bonds, which together will be known as Environment, Social and Governance (ESG) debt securities.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.60	6.58	7.29	7.33	8.56
3-Yr	5.71	6.62	7.33	7.37	8.60
5-Yr	5.84	6.73	7.54	7.57	8.81
10-Yr	6.20	6.78	7.59	7.63	8.86

* Weighted average yields



Global Indices	June 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	42320	-0.25	-1.60	9.05
Nasdaq	19298	-0.83	4.02	12.28
FTSE 100	8811	0.11	0.63	6.84
DAX	24324	0.19	5.38	30.94
Nikkei 225	37554	-0.51	0.36	-2.43
Hang Seng	23907	1.07	1.33	29.75
KOSPI	2812	1.49	9.93	4.56

Global 10 yr Sov. Yields (%)	June 5	1D Ago	3M Ago	1Y Ago
US	4.4	4.37	4.28	4.29
UK	4.594	4.59	4.67	4.22
German	2.5865	2.52	2.78	2.50
Japan	1.469	1.51	1.43	0.99

Commodity Prices	June 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.34	64.86	69.3	78.41
NYMEX Crude Oil (\$/bbl)	63.37	62.85	66.31	74.07
Gold (Rs / 10 gm)#	98163	96474	86300	71986

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Currencies Vs INR	June 5	1D Ago	M Ago	3M Ago
USD	85.77	85.96	84.24	87.09
GBP	116.27	116.14	111.93	111.45
Euro	97.89	97.71	95.40	92.63
100 Yen	59.93	59.66	58.36	58.19
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)

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Capital Market

- Cleantech asset financier StrideGreen raised \$3.5 million from Micelio Tech Fund, Incubate Fund Asia.
- HealthKois plans to roll out a \$400-million fund to invest in India's healthcare sector.
- Anduril Industries raised \$2.5 billion.
- Newgen Software secured a \$2.5 million, five-year international order for its Enterprise Workflow and Content Management System.
- Bharat Electronics Ltd (BEL), a Navratna Defence Public Sector Undertaking (PSU) secured orders worth Rs 2,323 crore from two major Indian shipbuilders.
- KEC International secured fresh orders worth Rs 2,211 crore across multiple segments, including Transmission & Distribution, Oil & Gas Pipelines, and Cables.

Global Equity

- Wall Street stocks ended lower on Thursday led by sharp fall in Tesla shares.
- 10-year US bond yield ended higher at 4.40% as investors awaited the upcoming nonfarm payrolls report for more clarity on the state of the US economy.
- FTSE index ended higher on Thursday buoyed by gains in mining stocks tracking higher metal prices.
- Asian markets were trading mixed at 8.30 AM.

International

- US initial jobless claims rose by 8,000 to 247,000 in the week ending May 31, up from the previous week's revised figure of 239,000.
- The US trade gap narrowed sharply to \$61.6 billion in April 2025, the lowest since September 2023, compared to a \$138.3 billion gap in March.
- The ECB cut key interest rates by 25 bps to 2.15% from 2.4%, deposit Facility Rate to 2.0% and the marginal lending rate to 2.4% at its June meeting, based on updated inflation and economic forecasts.
- Eurozone HCOB Construction PMI fell to 45.6 in May 2025 compared to 46 in April 2025.
- Eurozone Producer Prices Index eased down 0.7% in April 2025 compared to 1.9% in March 2025.

Upcoming market indicators

- US Balance of Trade, March (June 6)
- Eurozone HCOB Composite PMI Final/ Services PMI Final, April(June 6)
- Eurozone PPI, March (June 6)
- US Consumer Inflation Expectations May (June 9)
- China Inflation Rate May (June 9)
- China PPI May (June 9)
- China trade balance, May (June 9)
- UK Unemployment Rate April (June 10)
- US Inflation Rate May (June 11)
- Japan PPI May (June 11)
- US PPI May (June 12)
- US Initial Jobless Claims June 07 (June 12)
- UK GDP April (June 12)