

Broad Indices	June 30	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83606	-0.54	8.00	5.79	23.94
Nifty 50	25517	-0.47	8.49	6.27	22.97
BSE Mid cap	46854	0.67	12.82	1.51	36.02
Nifty Midcap 100	59741	0.60	15.62	7.18	33.66

Sectoral Indices	June 30	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53495	-0.49	12.14	-6.63
BSE Bankex	64178	-0.59	7.78	7.61
BSE CD	59784	0.42	9.93	1.63
BSE CG	72333	1.10	15.32	0.01
BSE FMCG	20241	-0.26	4.08	-1.50
BSE Healthcare	44259	0.56	6.85	19.26
BSE IT	38122	0.16	5.53	3.17
BSE Metal	31696	-0.49	2.83	-4.10
BSE Oil & Gas	27867	-0.19	10.88	-5.45
BSE Power	6938	0.12	5.30	-12.78
BSE Realty	7642	-0.87	15.76	-11.49

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Trent	3.29	TATA Cons. Prod	-2.26
SBI	1.86	Axis Bank	-2.11
Bharat Electronics	1.69	Kotak Mahindra	-2.01
IndusInd Bank	1.68	Hero Motocorp	-1.93
Jio Financial	1.02	Maruti Suzuki	-1.91

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv June 27	MF Inv June 26	DII Inv June 30
Buy	24067	19594	15733
Sell	18393	27918	12350
Net	5675	-8325	3383
Net (YTD)	-72549	235416	344592

Policy rates	June 30	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 30	1W Ago	M Ago	3M Ago
Call (%)	5.25	5.25	5.75	7.00
10 Yr Gilt(%)^	6.32	6.31	6.27	6.58
TREP (%)	5.24	5.10	5.80	5.70
Short-term debt	June 30	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.20	6.23	6.43	7.25
6-month CPs (%)	6.50	6.55	6.90	7.75
3-month CDs (%)	5.82	5.85	6.10	7.00
6-month CDs (%)	6.10	6.11	6.45	7.40
182-day T-bill (%)^	5.50	5.43	5.60	6.47
364-day T-bill (%)^	5.53	5.47	5.61	6.40
Long-term debt	June 30	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.88	5.86	5.74	6.44
5-Y G-sec (%)	6.01	6.03	5.86	6.45
10-Y G-sec (%)	6.32	6.31	6.27	6.58

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Monday, impacted by a fall in financial and auto stocks. Reports of US President's denial to extend the self-imposed deadline of July 9, 2025, for countries to reach new trade agreements also led to the fall.
- The top losers were Tata Consumer Products, Axis Bank, Kotak Mahindra, Hero MotoCorp and Maruti Suzuki, which were down 1.91-2.26%.
- The top gainers were Trent, SBI, Bharat Electronics, IndusInd Bank and Jio Financial, which were up 1.02-3.29%.

Indian Debt

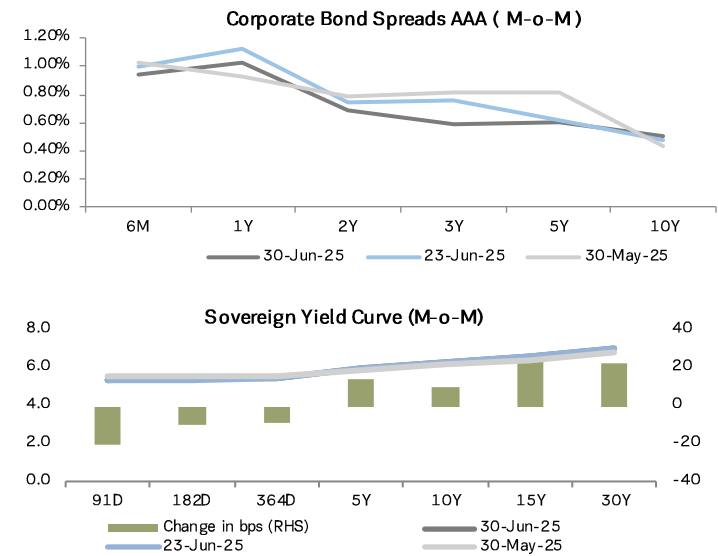
- The interbank call money rate ended higher at 5.25% on Monday compared to 5.05% on Friday.
- Government bond prices ended lower on Monday after weekly debt auction results released by RBI on Friday reported subdued demand
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.32% on Monday compared to 6.31% on Friday.

Economy and Government

- India Industrial Production expanded by 1.2% in May 2025 compared to downwardly revised 2.6% increase in April 2025.
- The Union government reported fiscal deficit of Rs 13,163 crore for April-May, amounting to 0.8% of the target for the whole of 2025-26.
- Union Finance Minister Nirmala Sitharaman said India's sovereign rating does not fully reflect its macroeconomic stability, even with a sustained high growth trajectory and sound fiscal management, while stressing the need for international credit rating methodologies to evolve.
- The Ministry of Railways has announced that reservation charts for long-distance trains will now be prepared eight hours before departure, instead of the current four hours.
- The Union government has approved the annual plan of Rs 3,667 crore for the construction and up-gradation of roads, bridges and related infrastructure in Himachal Pradesh for the financial year 2024-25.
- The Reserve Bank said Bank credit to industry expanded to 4.9% in the fortnight ended May 30, against 8.9% growth in the corresponding period of the previous year.
- the Reserve Bank of India has decreased its short dollar positions in the derivatives market for the third consecutive month, reaching \$65.2 billion in May.
- RBI's bi-annual Financial Stability Report (FSR) has projected that gross non-performing assets (NPAs) of banks will worsen to 2.5% in March 2027 from 2.3% in March 2025.
- Sebi said that registered intermediaries are allowed to use 'e-KYC Setu System' of National Payments Corporation of India (NPCI) to perform digital KYC.
- Sebi extended the deadline by two months till August for regulated entities to adopt and implement the cybersecurity and cyber resilience framework.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.60	6.55	7.26	7.30	8.53
3-Yr	5.88	6.58	7.29	7.33	8.56
5-Yr	6.01	6.72	7.53	7.56	8.80
10-Yr	6.32	6.92	7.73	7.76	9.00

* Weighted average yields



Global Indices	June 30	1D % Chg	3M % Chg	1Y % Chg
DJIA	44095	0.63	6.04	12.72
Nasdaq	20370	0.47	17.59	14.87
FTSE 100	8761	-0.43	1.18	7.31
DAX	23910	-0.51	6.45	31.12
Nikkei 225	40487	0.84	9.07	2.28
Hang Seng	24072	-0.87	2.76	35.86
KOSPI	3072	0.52	20.08	9.79

Global 10 yr Sov. Yields (%)	June 30	1D Ago	3M Ago	1Y Ago
US	4.24	4.29	4.27	4.36
UK	4.48	4.50	4.70	4.18
German	2.60	2.60	2.73	2.49
Japan	1.43	1.43	1.53	1.03

Commodity Prices	June 30	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.74	67.77	73.63	86.33
NYMEX Crude Oil (\$/bbl)	65.11	65.52	69.36	81.54
Gold (Rs / 10 gm)#	95886	95784	89164	71835

ibjirates spot prices

Currencies Vs INR	June 30	1D Ago	M Ago	3M Ago
USD	85.54	85.56	85.48	85.58
GBP	117.47	117.55	115.14	110.74
Euro	100.45	100.20	96.94	92.32
100 Yen	59.43	59.30	59.36	56.75
Forex Reserve (\$ bn)*	697.94	698.95	590.29	658.80

* Data pertains to June 20 and June 13 respectively Source: CRISIL

Key Macro Indicators	
CPI	2.82% (May-2025)
WPI	0.39% (May-2025)
IIP	1.2% (May -2025)
GDP Growth Rate	7.4% (Jan-Mar FY25)

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Capital Market

- Tenneco Clean Air India Ltd filed preliminary papers with Sebi for a Rs 3,000-crore initial public offering (IPO).
- REIT raised Rs 1,550 crore through NCDs and term loans to refinance existing debt, projecting annual interest savings of 113 bps.
- Jumbotail raised \$120 million in a funding round led by SC Ventures.
- Curefoods India has filed its Draft Red Herring Prospectus (DRHP) with SEBI worth Rs 800 crore.
- AppsForBharat raised Rs 175 crore in a Series C funding round led by Susquehanna Asia Venture Capital, with participation from existing investors.
- Godrej Properties acquired a 40-acre land parcel in Haryana, for approximately Rs 600 crore, marking its eleventh new project announcement in FY25.
- Silverton Industries filed draft papers with markets regulator Sebi through an initial public offering (IPO) worth Rs 300 crore.

Global Equity

- Wall Street stocks ended higher on Monday over optimism around trade deals and potential rate cuts.
- 10-year US bond yield ended lower at 4.24% following concerns over US fiscal outlook and lingering worries over trade tariff deals.
- FTSE index closed lower on Monday as investors were cautious ahead of the July 9 deadline for potential US reciprocal tariffs.
- Asian markets were trading higher at 8.30 AM.

International

- US Chicago PMI slipped to 40.4 in June 2025 compared to 40.5 in May 2025.
- US Dallas Fed Manufacturing Index rose to -12.7 in June 2025 compared to -15.3 in May 2025.
- The British economy expanded 1.3% year-on-year in the first quarter of 2025, compared to 1.5% in Q4 of 2024.
- China Caixin General Manufacturing PMI unexpectedly rose to 50.4 in June 2025, compared to 48.3 in May 2025.
- Japan Construction Orders in Japan increased 14% in May 2025 compared to 52.7% in April 2025.
- Japan housing starts plunged 34.4% year-over-year in May 2025 compared to a 26.6% decline in April 2025.
- Japan Jibun Bank Manufacturing PMI rose to 50.1 in June 2025, compared to 49.4 in May 2025.

Upcoming market indicators

- US S&P Global Manufacturing PMI Final, Jun (July 1)
- US JOLTs Job Openings, May (July 1)
- US ISM Manufacturing PMI, June (July 1)
- US Dallas Fed Services Index, June (July 1)
- Eurozone HCOB Manufacturing PMI Final, Jun (July 1)
- US ADP Employment Change, June (July 2)
- US Non-Farm Payrolls, Jun (July 3)
- US S&P Global Composite/Services PMI Final, Jun (July 3)
- US ISM Services PMI, Jun (July 3)
- Eurozone HCOB Composite/Services PMI Final, Jun (July 3)