

Broad Indices	June 27	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84059	0.36	8.31	6.08	24.07
Nifty 50	25638	0.35	8.67	6.63	23.04
BSE Mid cap	46541	0.38	11.30	1.25	35.78
Nifty Midcap 100	59385	0.27	14.56	7.15	33.29

Sectoral Indices	June 27	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53759	0.30	11.48	-6.21
BSE Bankex	64556	0.39	8.81	7.11
BSE CD	59534	0.40	8.79	1.36
BSE CG	71549	0.83	13.90	-1.49
BSE FMCG	20293	0.14	5.05	-0.98
BSE Healthcare	44015	0.69	6.14	19.70
BSE IT	38060	-0.24	3.50	3.07
BSE Metal	31851	0.37	2.88	-2.96
BSE Oil & Gas	27920	1.21	11.44	-3.84
BSE Power	6929	1.14	4.15	-12.95
BSE Realty	7710	-1.57	15.11	-10.16

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Jio Financial	3.50	TATA Cons. Prod	-1.84
Asian Paints	3.01	Dr Reddys Labs	-1.55
Apollo Hospital	2.91	Trent	-1.43
IndusInd Bank	2.58	Wipro	-1.29
Adani Enterpris	2.32	Eternal	-1.25

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv June 26	MF Inv June 25	DII Inv June 27
Buy	29759	9187	40672
Sell	19096	7850	41438
Net	10663	1337	-766
Net (YTD)	-78224	243741	341209

Policy rates	June 27	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 27	1W Ago	M Ago	3M Ago
Call (%)	5.05	5.30	5.45	6.35
10 Yr Gilt(%)^	6.31	6.32	6.25	6.60
TREP (%)	5.50	5.30	5.00	6.50
Short-term debt	June 27	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.30	6.23	6.50	7.90
6-month CPs (%)	6.54	6.61	6.85	7.75
3-month CDs (%)	5.92	5.86	6.15	7.51
6-month CDs (%)	6.13	6.14	6.49	7.40
182-day T-bill (%)^	5.53	5.43	5.65	6.52
364-day T-bill (%)^	5.53	5.47	5.63	6.43
Long-term debt	June 27	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.93	5.86	5.76	6.48
5-Y G-sec (%)	6.03	6.02	5.85	6.49
10-Y G-sec (%)	6.31	6.32	6.25	6.60

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Friday, supported by easing geopolitical tensions in the Middle East and optimism around progress in trade talks between the US and India.
- The top gainers were Jio Financial, Asian Paints, Apollo Hospitals, IndusInd Bank and Adani Enterprises, up 2.32-3.50%.
- The top losers were TATA Consumer Products, Dr Reddy's Laboratories, Trent, Wipro and Eternal, down 1.25-1.84%.

Indian Debt

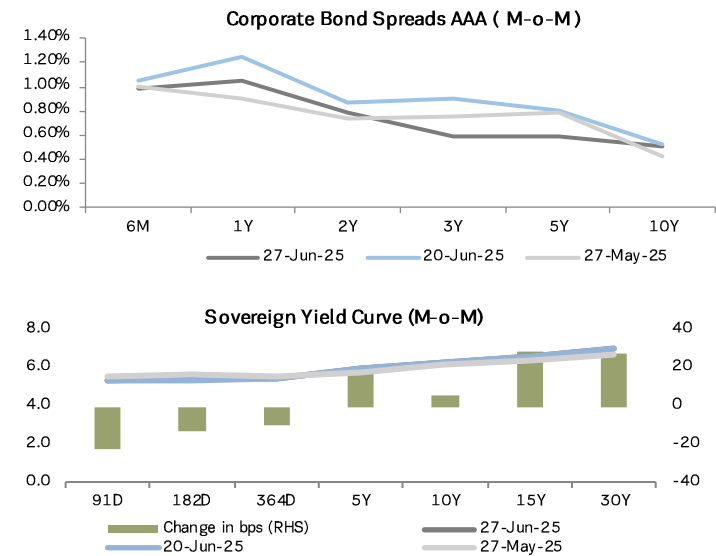
- The interbank call money rate ended lower at 5.05% on Friday compared to 5.30% on Thursday.
- Government bond prices ended marginally lower on Friday following lower-than-expected cut-off prices in weekly debt sale conducted by RBI.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.31% on Friday compared to 6.28% on Thursday.

Economy and Government

- India's current account balance recorded a surplus of \$13.5 billion or 1.3% of GDP in Q4 FY25 as against a deficit of \$11.3 billion or 1.1% of GDP in Q3FY25.
- India's forex reserves dropped by \$1.01 billion to \$697.93 billion for the week ended June 20.
- National Statistics Office (NSO) data showed that the Gross Value of Output (GVO) from the agriculture and allied sector increased 54.6 per cent during FY12 to FY24 to Rs 29.49 lakh crore at constant prices.
- RBI data showed India's external debt increased by 10% to \$736.3 billion at the end of March 2025 compared to \$668.8 billion in the year-ago period.
- Bihar government has launched the Bihar State Bridge Maintenance Policy 2025, a first-of-its-kind state-level framework for systematic bridge upkeep.
- The Employees' State Insurance Corporation approved the second phase of the scheme to promote registration of employers or employees (SPREE scheme) while giving its go ahead to the amnesty scheme 2025 allowing one-time dispute resolution.
- The Ministry of Power announced the launch of a task force to conceive the India Energy Stack (IES), an initiative aimed at creating a unified, secure, and interoperable digital public infrastructure (DPI) for the energy sector.
- The Reserve Bank of India (RBI) issued final guidelines for the due diligence of operators managing Aadhaar Enabled Payment System (AePS) touchpoints, aimed at streamlining their onboarding process and strengthening fraud risk management.
- The Securities and Exchange Board of India (Sebi) has revised the minimum information that companies must provide to their audit committees and shareholders for the approval of related party transactions (RPTs). The new standards will come into effect from September 1.
- The Department of Telecommunications (DoT) has proposed changes to the country's cybersecurity framework to reduce fraud involving the misuse of mobile phone numbers.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.62	6.58	7.29	7.33	8.56
3-Yr	5.92	6.60	7.31	7.35	8.58
5-Yr	6.03	6.72	7.53	7.56	8.80
10-Yr	6.31	6.92	7.73	7.76	9.00

* Weighted average yields



Global Indices	June 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	43819	1.00	3.59	11.89
Nasdaq	20273	0.52	13.87	13.52
FTSE 100	8799	0.72	1.53	7.57
DAX	24033	1.62	5.97	31.97
Nikkei 225	40151	1.43	6.22	2.06
Hang Seng	24284	-0.17	2.99	37.07
KOSPI	3056	-0.77	17.21	9.77

Global 10 yr Sov. Yields (%)	June 27	1D Ago	3M Ago	1Y Ago
US	4.29	4.26	4.38	4.29
UK	4.50	4.47	4.79	4.13
German	2.60	2.56	2.77	2.45
Japan	1.43	1.42	1.56	1.06

Commodity Prices	June 27	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	67.77	67.73	74.03	86.39
NYMEX Crude Oil (\$/bbl)	65.52	65.24	69.92	81.74
Gold (Rs / 10 gm)#	95784	97159	88417	71391

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Currencies Vs INR	June 27	1D Ago	M Ago	3M Ago
USD	85.56	85.75	85.32	85.76
GBP	117.55	117.51	115.74	110.86
Euro	100.20	100.14	97.13	92.45
100 Yen	59.30	59.33	59.59	57.01
Forex Reserve (\$ bn)*	697.94	698.95	685.73	654.27

* 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	2.70% (April -2025)
GDP Growth Rate	7.4% (Jan-Mar FY25)

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Capital Market

- Credila Financial Services has filed a UDRHP-I with SEBI to raise Rs 5,000 crore through an IPO.
- Meesho has received shareholders' approval to raise up to Rs 4,250 crore through an initial public offering.
- Rayzon Solar plans to raise Rs 1,500 crore through its maiden public issue comprising entire fresh issue and no offer for sale.
- Curefoods filed its draft red herring prospectus for an IPO, comprising a fresh issue of Rs 800 crore.
- Wakefit has filed the draft red herring prospectus (DRHP) for its initial public offering (IPO) to raise Rs 468 crore in fresh issue.
- Jio BlackRock Broking Pvt Ltd. has received approval from SEBI to commence operations as a brokerage firm in India.

Global Equity

- Wall Street stocks ended higher on Friday as upbeat earnings results of major tech companies renewed confidence around artificial intelligence and as latest PCE inflation data boosted Fed rate cut hopes.
- 10-year US bond yield ended higher at 4.29% following unexpected inflation uptick.
- FTSE index ended higher on Friday buoyed by gains in financial and healthcare sectors amid easing US-China trade tensions and worries around geopolitical tensions.
- Asian markets were trading higher at 8.30 AM.

International

- US headline annual PCE inflation accelerated to 2.3% in May 2025 from an upwardly revised 2.2% in April while core PCE inflation rose by 2.7% from 2.6%.
- Eurozone Economic Sentiment Indicator edged down to 94 in June 2025 compared to 94.8 in May 2025 while the Industrial Sentiment declined to -12 compared to -10.4 and the Services Sentiment rose to 2.9 from a revised 1.8.
- China official NBS Manufacturing PMI increased to 49.7 in June 2025 compared to 49.5 in May 2025 while the official NBS Non-Manufacturing PMI edged up to 50.5 from 50.3.
- Japan Industrial Production decreased 1.80% in May 2025 compared to a rise of 0.50% in April 2025.

Upcoming market indicators

- US Dallas Fed Manufacturing Index, June (June 30)
- China NBS Manufacturing/ non-manufacturing/ general PMI, June (June 30)
- Japan Industrial Production Prel, May (June 30)
- India Infrastructure Output, May (June 30)
- India Government Budget Value, May (June 30)
- 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)