



19 June 2025

INDIAN EQUITY MARKET

- Indian equity markets closed marginally lower, moving in a rangebound fashion with a negative bias as a cautious undertone prevailed among investors in response to hawkish commentary from the U.S. Federal Reserve and rising tensions in the Middle East. On June 18, 2025, the Federal Reserve kept its policy rate unchanged at 4.25%–4.50%, reiterating concerns over higher inflation and slower economic growth in the months ahead. It also warned of risks stemming from the trade war triggered by the U.S. President's tariff policies, further dampening investor confidence.
- Key benchmark indices BSE SENSEX and Nifty 50 lost 0.1% and 0.08% to close at 81,361.87 and 24,793.25 respectively.

CORPORATE NEWS

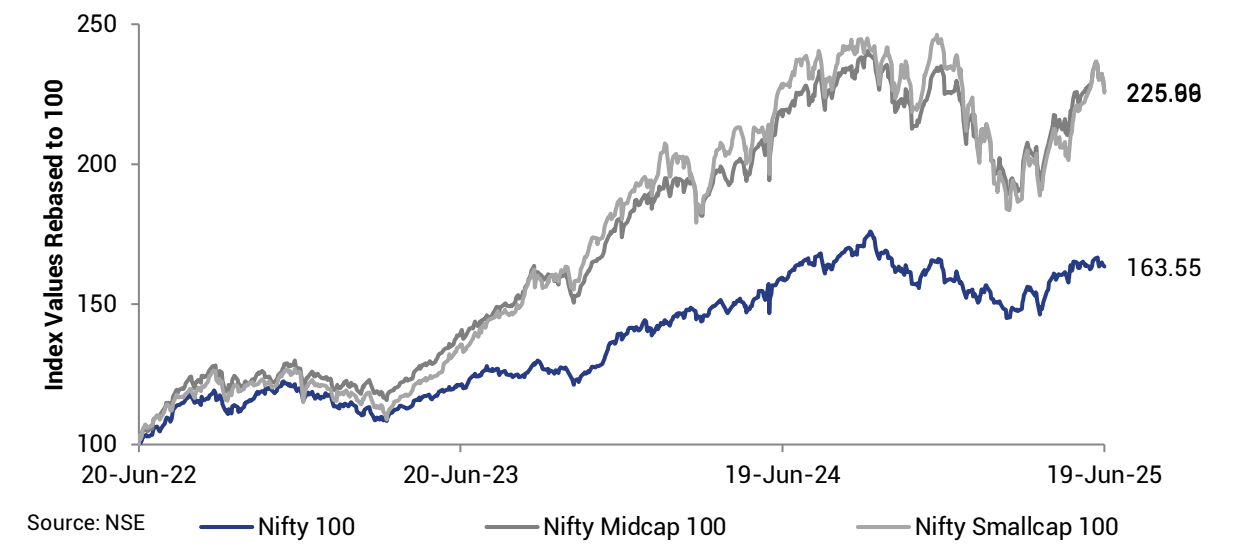
- Amazon plans to invest over Rs. 2,000 crore (approximately \$233 million) in India in 2025 to enhance its logistics and safety standards. This investment will be allocated towards the expansion and modernization of the company's infrastructure, initiatives focused on employee safety and wellness, as well as the development of technologies for its fulfillment network.
- Amazon plans to invest over Rs. 2,000 crore (approximately \$233 million) in India in 2025 to enhance its logistics and safety standards.
- The fast-moving consumer goods (FMCG) division of Reliance Retail Ventures, known as Reliance Consumer Products Ltd (RCPL), plans to invest between Rs. 6,000 and Rs. 8,000 crore in the upcoming 12 to 15 months to enhance its beverage manufacturing capabilities.

GLOBAL EQUITY MARKET

- U.S. equity markets remained closed due to a public holiday.
- European equity markets ended on a mixed note amid rising speculation over potential U.S. involvement in the Israel-Iran conflict.
- Asian equity markets declined following hawkish commentary from the U.S. Federal Reserve and amid ongoing geopolitical unrest in the Middle East. Today (as of June 20), Asian markets opened mostly higher as investors awaited key economic data from China and continued to monitor escalating tensions between Israel and Iran.

INDIAN DERIVATIVES MARKET

- Nifty Jun 2025 Futures stood at 24,803.10, a premium of 9.85 points above the spot closing of 24,793.25. The turnover on NSE's Futures and Options segment fell to Rs.5,786.79 crore on June 19, 2025, compared with Rs. 5,21,673.45 crore on June 18, 2025.
- The NSE Put-Call ratio stood at 0.94 compared with the previous session's close of 0.95.



EQUITY MARKET UPDATE

Indian Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty 50	24,793	-0.08	-0.61	5.43	4.86	26,277	21,744	22.29	21.87
Nifty 100	25,320	-0.31	-0.90	2.93	3.37	27,336	22,177	22.13	22.45
Nifty 500	22,764	-0.71	-0.45	2.42	1.73	24,573	19,520	24.42	23.72
Nifty Midcap 100	57,160	-1.63	0.10	4.02	-0.07	60,926	46,866	32.13	29.91
Nifty Smallcap 250	16,813	-1.93	1.79	-0.77	-5.29	18,688	13,315	31.98	25.33
Nifty SME Emerge	14,412	-1.01	2.02	3.13	-13.21	17,224	11,930	32.70	50.17

Source: MFI 360 Explorer

Sector Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Auto	23,435	0.52	-2.57	-7.67	2.63	27,696	19,317	24.51	30.02
Nifty Bank	55,577	-0.45	0.28	8.13	9.27	57,050	47,703	14.56	15.78
Nifty FMCG	54,284	-0.31	-4.69	-4.17	-4.43	66,439	50,199	41.18	43.75
Nifty IT	38,665	-0.94	3.17	10.70	-10.78	46,089	30,919	28.89	28.47
Nifty Media	1,669	-1.91	-0.16	-17.31	-8.19	2,182	1,344	555.45	757.16
Nifty Metal	9,040	-1.29	-1.85	-7.50	4.52	10,322	7,690	18.35	20.75
Nifty Pharma	21,442	-0.68	-1.37	9.15	-8.42	23,908	19,121	30.66	34.21
Nifty Realty	993	-1.60	6.38	-11.18	-5.66	1,148	766	49.36	50.56
Nifty Energy	35,274	-1.10	-1.17	-13.12	0.24	45,022	29,313	16.26	13.55

Source: MFI 360 Explorer

Thematic Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Financial Services	26,300	-0.38	-0.79	14.63	11.85	27,087	22,358	17.37	17.71
Nifty India Consumption	11,451	0.08	-1.67	2.99	0.77	13,058	10,091	40.31	42.88
Nifty Infrastructure	8,975	-0.22	-0.72	0.92	6.04	9,704	7,590	23.48	21.20
Nifty MNC	28,023	-0.87	-0.78	-7.19	0.33	32,841	23,981	33.93	44.35
Nifty Public Sector Enterprises	9,735	-1.15	-2.31	-8.83	2.13	11,815	7,956	12.49	10.01

Source: MFI 360 Explorer

Global Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nasdaq 100 ^[1]	21,720	0.00	1.27	9.10	3.37	22,223	16,542	33.25	28.19
Nasdaq Composite ^[1]	19,546	0.13	1.72	9.43	1.22	20,205	14,784	30.71	20.62
FTSE 100	8,792	-0.58	1.06	7.15	7.57	8,909	7,545	16.70	11.85
CAC 40	7,553	-1.34	-4.19	-0.22	2.34	8,258	6,764	16.71	12.95
DAX	23,057	-1.12	-3.67	27.62	15.81	24,479	17,025	18.33	23.27
Nikkei	38,488	-1.02	2.64	-0.21	-3.52	42,427	30,793	18.57	18.07
Hang Seng	23,238	-1.99	-0.41	26.08	15.84	24,874	16,441	10.71	9.91
SSE Composite Index	3,362	-0.79	-0.16	11.40	0.31	3,674	2,690	12.00	12.13

Source: MFI 360 Explorer; Returns are based in local currency

F&O Trends	Px Last	Previous	Change %
Near Futures	24,803.10	24,826.90	-0.10
Near Basis	9.85	14.85	-33.67
Mid Futures	24,915.50	24,941.60	-0.10
Mid Basis	122.25	129.55	-5.63
Near Open Interest (Cr.)	1.11	1.12	-0.95
Mid Open Interest (Cr.)	0.66	0.64	3.56
Rollover (%)	39.60	38.58	2.64

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	11,210	11,808	-598	-6,232	-98,722
Mutual Funds**	11,306	5,634	5,672	35,943	222,207

*As on 19th June 2025;**As on 16th June 2025; Source: SEBI, NSDL

^[1]Data as on 18 Jun, 2025

INDIAN ECONOMY

- According to media reports, the statistics ministry is planning to incorporate migration data into the Periodic Labour Force Survey (PLFS) from 2026 to gain deeper insights into labor market dynamics and strengthen policy-making. This initiative is expected to improve the targeting and efficiency of welfare programs such as the 'One Nation One Ration Card' scheme.
- The government has revised import norms to restrict colloidal precious metals, aiming to prevent illegal liquid gold inflows. The Directorate General of Foreign Trade now limits imports of gold-containing alloys of palladium, rhodium, and iridium.
- The Union Finance Minister has urged fintech companies to expand into rural markets and support MSMEs, emphasizing the need for innovative solutions to combat digital fraud and improve agricultural connectivity. She noted that India's fintech sector, projected to exceed \$400 billion by 2029, has the potential to benefit other economies.

INDIAN DEBT MARKET

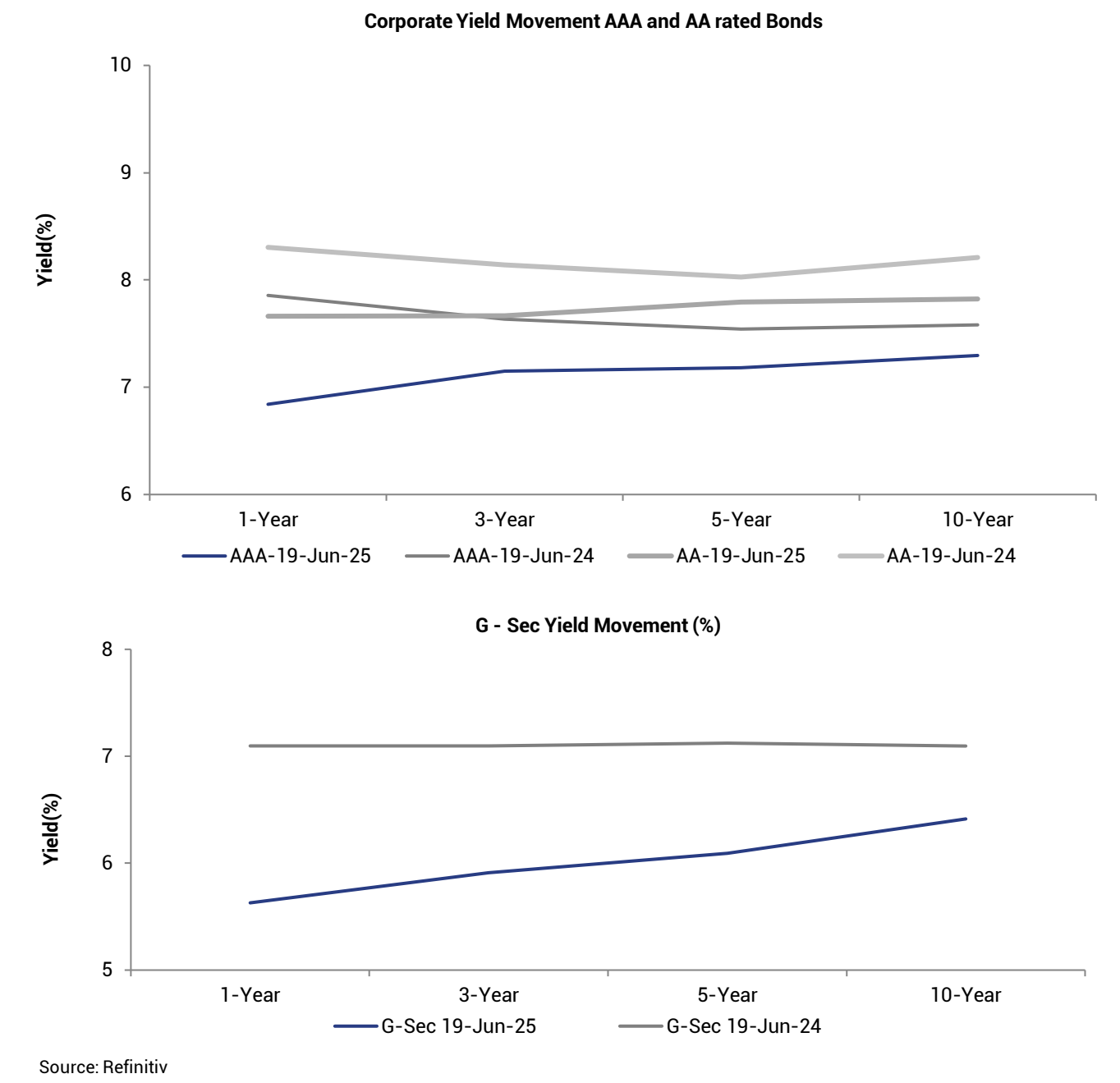
- Bond yields edged higher as investor sentiment was dampened by a surge in crude oil prices driven by escalating geopolitical tensions, while market participants trimmed positions ahead of Friday's debt auction.
- Yield on the 10-year benchmark paper (6.33% GS 2035) rose by 5 bps to close at 6.31% as compared to the previous close of 6.26%.
- According to media reports, IndiGrid Infrastructure Trust has accepted bids worth Rs. 2,650 crore for bonds maturing in four years, five years and ten years.

MONEY MARKET

- According to media reports, Rural Electrification Corporation Ltd. plans to raise Rs. 7,000 crore, through sale of bonds maturing in two years and in ten years.

SPREAD ANALYSIS

- Yields on gilt rose up to 10 bps across the maturities, barring 1 year paper that fell by 4 bps.
- Corporate bond yields increased between 2 to 9 bps across the curve, barring 1 year paper that was unchanged.
- Difference in spread between AAA corporate bond and gilt expanded up to 4 bps across the segments, barring 2 & 7 year papers that remained steady.



Key Indicators	Current	Previous
GDP (Q4 FY'25)	7.40%	6.40%
IIP (Apr'25)	2.70%	3.90%
Manufacturing PMI May'25	57.60	58.20
Credit Growth (May 30,2025)	9.00%	9.80%
Deposit Growth (May 30,2025)	9.90%	10.00%
WPI (May'25)	0.39%	0.85%
CPI (May'25)	2.82%	3.16%
Current Account Deficit (Q3 of FY25, in \$ Billion)	11.50	16.70
Fiscal Deficit (Apr to Apr 2025, as a % of Budget Estimates)	11.06	93.58
Trade Deficit (In \$ billion-May25)	21.88	26.42

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

Source: Refinitiv

DEBT MARKET UPDATE

Policy Rates (%)	19-Jun-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	5.50	5.50	6.00	6.50
CRR	4.00	4.00	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	19-Jun-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.30	5.34	5.86	6.74
CALL	5.26	5.29	5.79	6.65
T-Repo	5.18	5.20	5.64	6.50
OIS- 3 M	5.43	5.49	5.75	6.71
OIS- 6 M	5.47	5.53	5.68	6.74

Source: FBIL

Certificate of Deposit (%)	19-Jun-25	Week Ago	Month Ago	Year Ago
3-Month	5.92	5.82	6.43	7.10
6-Month	6.16	6.18	6.61	7.46
9-Month	6.23	6.29	6.55	7.53
12-Month	6.23	6.30	6.65	7.63

Source: Refinitiv

Commercial Paper (%)	19-Jun-25	Week Ago	Month Ago	Year Ago
3-Month	5.93	5.85	6.38	7.16
6-Month	6.25	6.28	6.59	7.46
12-Month	6.40	6.38	6.65	7.69

Source: Refinitiv

Maturity Buckets Yield	Yield (%)				Change in bps		
	Closing	Previous	1 Month	1 Year	1 Day	1 Month	1 Year
1 Yr GOI Bond	5.55	5.59	5.83	6.98	-4	-28	-143
3 Yr GOI Bond	5.83	5.82	5.87	6.98	1	-4	-115
5 Yr GOI Bond	6.00	5.94	5.95	7.00	6	6	-100
10 Yr GOI Bond	6.31	6.26	6.23	6.97	5	8	-66
15 Yr GOI Bond	6.66	6.61	6.41	7.01	5	25	-35
US 10 Yr Treasury ^[1]	4.40	4.39	4.48	4.22	0	-8	18

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	19-Jun-25	1 Month Avg.	1 Year Avg.	19-Jun-25	1 Month Avg.	1 Year Avg.
1 Yr	121	119	88	203	182	143
3 Yr	124	109	72	175	175	134
5 Yr	109	101	65	170	169	116
10 Yr	88	75	49	141	130	103

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	19-Jun-25	Week Ago	Month Ago	Year Ago
Govt Securities	66,724	69,405	59,371	65,129
Call Money	14,174	15,397	15,136	11,579
T-Repo	396,475	416,932	383,322	383,927
LAF	NA	NA	NA	NA
Treasury Bills	6,195	16,156	10,526	6,833
Interbank Liquidity	NA	NA	NA	NA

Source: Refinitiv

Transaction Trends (Debt)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	569	593	-24	-6,068	1,012
Mutual Funds**	14,641	16,692	-2,051	-13,964	-311,193

*As on 19th June 2025;**As on 16th June 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: June 16-20, 2025	27,000	0	0.00%
Month: Jun 2025	157,000	93,000	59.24%
H1: Apr 25-Sep 25	800,000	338,000	42.25%

Source: RBI

^[1]Data as on 18 Jun, 2025

GLOBAL ECONOMY

- The Bank of England decided to keep its key interest rates unchanged on 19th Jun 2025 due to the fact that inflation in the U.K. has consistently exceeded the target, coupled with escalating geopolitical tensions that have increased the risk of inflation. During the policy board meeting, six out of the nine members of the Monetary Policy Committee voted in favor of keeping the Bank Rate unchanged at 4.25%.

INTERNATIONAL MARKET UPDATE

- The eurozone's construction climbed 1.7% MoM in Apr 2025, reversing a 0.2% fall in Mar 2025, according to Eurostat .

COMMODITY MARKET

- Gold prices increased due to heightened concerns over the ongoing Middle East tensions.
- Brent crude oil prices (spot) rose amid growing speculation about potential U.S. involvement in the Israel-Iran conflict.

CURRENCY UPDATE

- The Indian rupee weakened in spot trading against the U.S. dollar, pressured by rising crude oil prices.
- The euro strengthened against the U.S. dollar despite hawkish remarks from the U.S. Federal Reserve during its monetary policy meeting on Jun 18, 2025.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,372	0.11	4.44	44.89	28.53	3,432	2,298
Silver (\$/oz)	36	-0.81	12.65	22.46	26.20	37	27
NYMEX Crude(\$/bbl) ^[1]	76	0.36	18.67	-8.33	4.63	85	58
Brent Crude(\$/bbl)	82	4.03	24.24	-5.40	7.24	90	62
Baltic Dry Index ^[1]	1,874	-4.00	39.12	-3.55	87.96	2,179	715
Core Commodity Index ^[1]	386	0.13	6.52	11.33	8.09	386	315
Industrial Metals Index	NA	NA	NA	NA	NA	NA	NA
Agriculture Index	NA	NA	NA	NA	NA	NA	NA
Energy Index	NA	NA	NA	NA	NA	NA	NA
Precious Metals Index	NA	NA	NA	NA	NA	NA	NA

Source: Refinitiv

Composite PMI Data	Latest Reported	1 Month Ago	3 Months Ago	6 Months Ago	1 Year Ago
U.S.	53.00	50.60	51.60	54.90	54.50
Euro Zone	50.20	50.40	50.20	48.30	52.20
Germany	48.50	50.10	50.40	47.20	52.40
France	49.30	47.80	45.10	45.90	48.90
U.K.	50.30	48.50	50.50	50.50	53.00
Japan	50.20	51.20	52.00	50.10	52.60
China	49.60	51.10	51.50	52.30	54.10

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	98,886	-0.05	6.03	38.25	30.26	98,931	67,884
Silver (1 kg)	107,235	-1.78	12.43	21.66	24.91	109,174	78,617
Crude Oil (1 bbl)	6,485	0.64	21.28	-4.77	6.89	7,249	1,277
Natural Gas (1 mmbtu)	344	3.83	20.68	41.80	2.35	392	138
Aluminium (1 kg)	246	-0.22	2.91	5.63	1.42	267	209
Copper (1 kg)	879	-0.78	2.18	3.26	10.10	934	772
Nickel (1 kg)	1,320	0.53	-1.42	-10.44	-1.35	1,783	1,276
Lead (1 kg)	186	0.00	0.30	-4.33	-1.17	201	179
Zinc (1 kg)	255	-0.08	-1.96	-3.26	-10.18	301	241
Mentha Oil (1 kg)	943	0.02	-4.53	-0.28	-5.16	1,023	916
Cotton (1 bales)	100	0.00	0.00	0.00	0.00	100	100

Source: MCX-SX

CURRENCY MARKET UPDATE

Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
USD/INR	86.72	0.28	1.55	3.92	1.29	87.95	83.34
EUR/INR	99.78	0.59	3.96	11.29	12.66	99.88	87.29
GBP/INR	116.90	0.81	2.51	10.14	9.22	117.10	104.67
YEN(100)/INR	59.67	0.21	1.25	13.05	9.65	60.83	51.52
SGD/INR	67.43	0.36	2.26	9.15	7.65	67.49	61.35

Source: Refinitiv

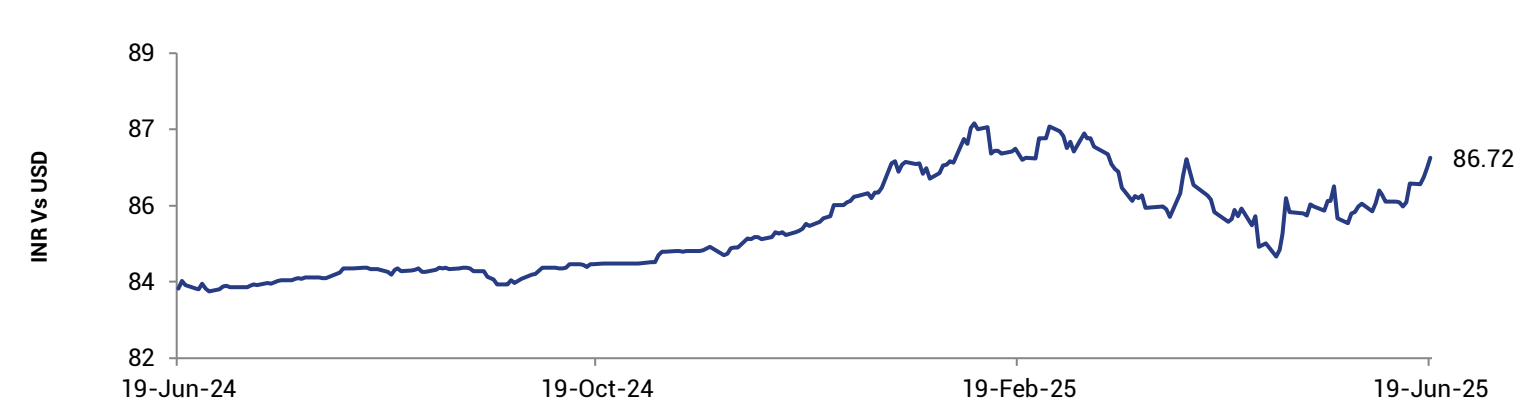
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.15	0.13	2.24	7.00	11.02	1.16	1.01
GBP/USD	1.35	0.36	0.82	5.89	7.63	1.36	1.21
USD/JPY	145.45	0.24	0.41	-7.99	-7.46	161.99	139.56
SGD/USD	0.78	-0.09	0.66	4.99	6.14	0.78	0.73
Dollar Index	98.91	0.00	-1.51	-6.03	-8.83	110.18	97.60

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	86.77	0.30	1.04	1.53	0.37
Future 3 Month	87.18	0.38	1.38	1.49	0.29
Future 6 Month	87.73	0.29	1.76	1.57	0.52
NDF 1 Month	86.76	0.25	1.04	1.47	0.12
NDF 3 Month	87.01	0.25	0.78	1.41	0.03
NDF 6 Month	87.55	0.36	0.80	1.52	0.20

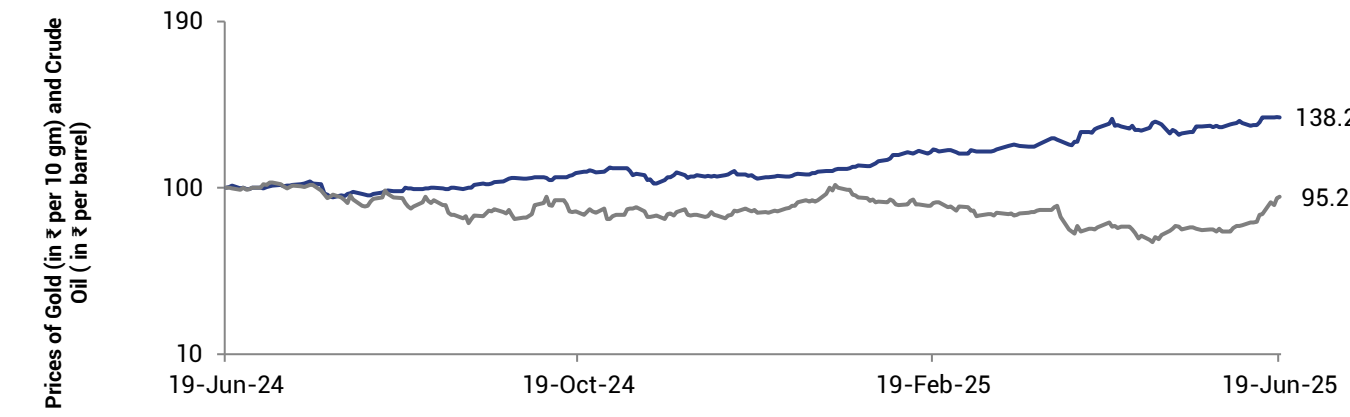
Source: Refinitiv

RUPEE VS. U.S. DOLLAR



Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



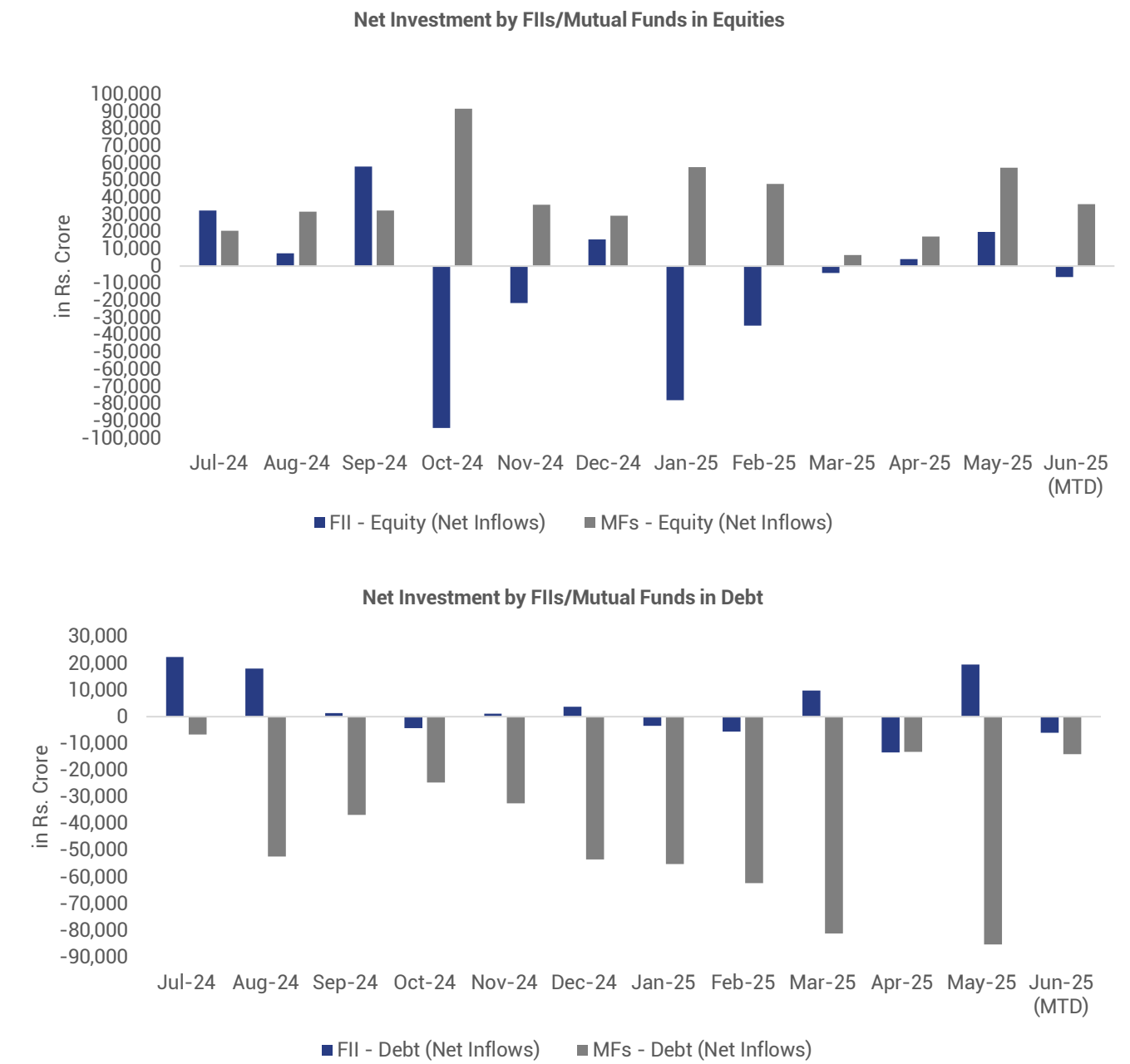
Source: MCX-SX

^[1]Data as on 18 Jun, 2025

MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 11,306.06 crore as against sale of Rs. 5,634.09 crore as on Jun 16, 2025. This led to a net purchase of Rs. 5,671.97 crore compared with a net purchase of Rs. 1,778.00 crore on Jun 13, 2025.
- Mutual funds bought debt worth Rs. 14,641.43 crore as against sale of Rs. 16,692.14 crore as on Jun 16, 2025. This led to a net sale of Rs. 2,050.71 crore compared with a net purchase of Rs. 26.38 crore on Jun 13, 2025.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Forex Reserves	20-Jun-25
Loans and Advances to Central Government	20-Jun-25
Loans and Advances to State Government	20-Jun-25
Reserve Money	25-Jun-25
Money Supply	25-Jun-25
Currency in Circulation	25-Jun-25

^[1]Data as on 18 Jun, 2025

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MF SCHEMES CATEGORY WISE PERFORMANCE

Category-Equity	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Large Cap Fund	-0.71	-0.48	0.57	3.56	19.66	20.06
Mid Cap Fund	-1.47	0.87	-3.99	2.16	26.75	28.47
Large & Mid Cap Fund	-1.25	0.29	-1.99	3.41	23.65	24.52
Small Cap Fund	-1.81	1.34	-7.28	1.44	26.11	32.80
Multi Cap Fund	-1.17	0.45	-3.08	2.37	24.70	26.07
Focused Fund	-1.00	-0.08	-1.23	3.44	20.94	21.23
Value Fund	-1.30	-0.29	-2.17	1.37	24.94	25.94
Contra Fund	-0.92	-0.17	-1.95	3.07	25.90	27.66
ELSS	-1.20	0.28	-2.08	2.45	22.42	24.46
Sectoral	-1.46	0.30	-0.59	5.56	24.77	25.20
Thematic	-1.03	0.08	-3.21	1.16	23.06	23.39
Dividend Yield Fund	-0.87	-0.16	-1.31	1.37	24.21	25.87

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Category-Debt	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Overnight Fund	5.05	5.38	6.06	6.33	6.33	5.06
Liquid Fund	5.38	6.47	7.04	7.12	6.86	5.43
Ultra Short Duration Fund	5.47	7.23	7.58	7.32	6.73	5.48
Low Duration Fund	5.58	7.26	8.55	8.02	7.10	6.12
Money Market Fund	5.80	8.12	8.38	7.87	7.17	5.73
Short Duration Fund	3.79	4.91	9.89	9.05	7.53	6.25
Medium Duration Fund	2.04	2.26	10.25	9.43	8.22	6.99
Medium to Long Duration Fund	-5.36	-7.08	8.89	8.33	7.68	5.62
Long Duration Fund	-29.64	-28.39	6.15	7.03	9.42	5.58
Corporate Bond Fund	2.60	3.62	10.22	9.37	7.70	6.21
Gilt Fund	-17.18	-20.92	7.39	7.59	7.67	5.43
Gilt Fund with 10 year constant duration	1.11	-3.79	11.79	10.47	9.22	5.71
Dynamic Bond	-8.92	-10.40	8.65	8.33	7.69	5.91
Banking and PSU Fund	1.56	3.58	9.88	9.03	7.52	6.07
Floater Fund	4.99	4.49	9.57	9.03	7.82	6.44
Credit Risk Fund	4.23	6.00	13.84	11.17	8.71	9.39

Less than 1 yr return are simple annualised and greater than 1 yr returns are CAGR

Category-Hybrid	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Arbitrage Fund	0.11	0.55	3.38	6.73	6.64	5.31
Balanced Advantage	-0.60	-0.09	0.75	4.49	14.39	13.42
Aggressive Hybrid Fund	-0.72	-0.01	0.25	4.89	18.35	19.20
Equity Savings	-0.20	0.15	2.27	6.43	11.35	11.30
Conservative Hybrid Fund	-0.21	-0.18	3.20	7.31	10.41	9.94
Multi Asset Allocation	-0.17	1.00	3.88	7.07	17.89	19.82

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Source: MFI 360 Explorer

Event	Date
Bank Credit to Commercial Sector	25-Jun-25
Credit Growth	27-Jun-25
Deposit Growth	27-Jun-25
Index of Industrial Production (May 2025)	28-Jun-25
Infrastructure Output	30-Jun-25
Fiscal deficit (as a % of budget estimates)	30-Jun-25