



Indian Equity Summary

- Indian equity benchmark indices closed Monday with a gain after the likelihood of a peace deal in West Asia eased geopolitical tensions and cooled crude oil prices, strengthening India's macro outlook.

Nifty Equity Benchmark Indices (Returns %)

Index	15 June	1 Day	1 Week	1 Month	1 Year
Mid Cap	61,550	1.29	2.74	1.62	5.71
Small Cap	18,400	1.11	3.58	2.89	0.14
Auto	26,978	2.60	5.05	3.48	15.65
Bank	57,199	0.68	5.80	6.49	3.01
Energy	39,494	0.64	-0.48	-0.81	10.50
FMCG	49,043	0.44	1.96	-3.93	-10.06
Infra	9,371	1.45	3.12	0.46	4.44
IT	28,068	0.98	-2.04	1.27	-27.04
Metal	13,084	1.78	1.32	-1.63	41.31
Pharma	24,220	-0.66	0.30	-1.68	10.17
Realty	800	3.96	6.79	5.78	-20.56

Domestic Equity Benchmark Indices (Returns %)

Index	15 June	1 Day	1 Week	1 Month	1 Year
Sensex	76,264	0.98	3.73	1.36	-5.98
Nifty 50	23,854	0.98	3.16	0.89	-3.50

FPI / DII Investment Data

(Rs Cr)	15 June	MTD	YTD
FPI*	-596.85	-41500.15	-286117.90
DII	3189.26	61136.78	437921.39

*Data as of 12 June

Nifty P/E, P/B, Dividend Yield*

P/E	P/B	Dividend Yield
20.57	3.14	1.21

* Data as of 15 June



Indian Debt Market Summary

- The interbank call-money rate ended higher at 5.35% on Monday compared to 5.20% on Friday.
- Government bond prices ended higher on Monday, driven by easing oil prices after a potential US-Iran peace deal.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.88% on Monday compared to 6.89% on Friday.

Debt watch

	15 June	Week Ago	Month Ago	Year Ago
Call Rate	5.35%	5.25%	5.23%	5.00%
Repo	5.25%	5.25%	5.25%	5.50%
91 Day T-Bill	5.26%	5.36%	5.42%	5.35%
10 Yr Gilt*	6.88%	6.96%	7.06%	6.30%

* Weighted average yields

Yields (%)	Gsec*	AAA	AA+	AA	AA-	A+
6 month	5.50	7.42	8.16	8.21	9.44	9.92
1 Year	5.90	7.40	8.14	8.19	9.42	9.90
3 Year	6.18	7.37	8.11	8.16	9.39	9.87
5 Year	6.46	7.43	8.27	8.32	9.55	10.03
10 Year	6.88	7.55	8.39	8.44	9.67	10.15

G-sec and corporate bonds data as of 15 June Weighted average yields for G-sec data 6 month G-sec: 182 day T-Bill rate; 1 year G-Sec: 05.63% GS 2026; 3 year G-Sec: 7.06% GS 2028; 5 year G-Sec: 06.75 GS 2029; 10 year G-Sec: 06.33 GS 2035

Economic indicators

	YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)		3.93% (May'26)	3.21% (Feb'26)	3.03% (May'25)
IIP		4.90% (Apr-26)	5.10% (Jan-26)	2.60% (Apr-25)
GDP		7.80% (Jan-Mar FY26)	8.00% (Oct-Dec FY26)	7.00% (Jan-Mar FY25)
Monthly Inflation (WPI)		9.68% (May'26)	2.18% (Feb'25)	-0.20% (May'25)



Economy, Regulatory & Government

- India wholesale prices advanced 9.68% year-on-year in May 2026, compared to a marginally revised 8.26% rise in April 2026.
- India unemployment rate rose to 5.5% in May 2026 compared to 5.2% in April 2026.
- India merchandise trade deficit stood at \$28.21 billion in May, with exports at \$45.2 billion and imports at \$73.41 billion.
- The Embassy of India in Abu Dhabi has announced a change in the outsourced service provider handling Indian passport, visa and consular services across the United Arab Emirates from July 1, 2026
- India and Slovakia have announced a comprehensive partnership, enhancing bilateral cooperation across key sectors.
- The Odisha government has announced a plan to invest more than Rs 5,000 crore to develop one of India's largest sports ecosystems.
- West Bengal Chief Minister Suvendu Adhikari said the Centre has allocated Rs 8,500 crore under the VB G-RAM G scheme.
- The RBI introduced a new framework allowing banks to offer differential interest rates on deposits based on Liquidity Coverage Ratio (LCR) runoffs, marking a structural shift in deposit pricing and potentially improving bank liquidity management and foreign inflow attractiveness.
- The Reserve Bank of India (RBI) clarified that payment of incentives by third parties to employees of regulated entities is prohibited, but banks and NBFCs are free to incentivise employees for sale of financial products.



International News

- US industrial production increased by 1.7% year-on-year in May 2026, compared with 1.4% growth in the previous month.
- US Manufacturing production rose by 1.4% year-on-year in May 2026, following revised growth of 1.2% in the previous month.
- Eurozone Industrial Production increased 0.3% in April 2026 compared to downwardly revised 2.8% decline in March 2026.
- Eurozone recorded a trade deficit of €1,004.50 million in April 2026, while its balance of trade averaged €5,909.07 million from 1999 to 2026, peaking at €35,483 million in March 2025.
- China industrial production edged up to 4.5% year-on-year in May 2026, accelerating compared to a 4.1% rise in April 2026.
- China retail sales fell 0.6% year-on-year in May 2026, compared to a 0.2% gain in April 2026.
- China urban unemployment rate edged lower to 5.1% in May 2026, compared with 5.2% in April 2026.
- China new home prices across 70 cities declined 3.5% year-on-year in May 2026, unchanged compare with April's pace.

Currencies Vs INR			
	15 June	12 June	31 Dec
USD	94.68	95.38	86.10
GBP	127.31	127.84	116.56
Euro	109.91	110.36	99.32
100 Yen	59.13	59.50	59.99

	15 June	Week Ago	Month Ago	Year Ago
US 10-yr yield (%)	4.47	4.56	4.59	4.41
UK 10-yr yield (%)	4.83	4.95	5.18	4.56
German 10-yr (%)	2.95	3.06	3.15	2.54
Japan 10-yr (%)	2.57	2.72	2.71	1.40
London Brent Crude Oil (\$/bbl)	83.17	94.25	109.26	74.23
Gold (Rs/10 gms)	150,646	151,489	158,210	99,058

	15 June	1 Day	1 Week	1 Mth	1 Year
DJIA	51671	0.92	1.74	4.33	22.45
Nasdaq	26684	3.07	2.91	1.75	37.50
FTSE	10431	-0.39	0.55	2.31	17.85
Nikkei	69318	4.99	8.27	12.88	83.21
Hang Seng	24843	0.50	0.75	-4.31	3.98
Strait Times	5077	1.02	2.29	1.77	29.81

Returns are in base currency

Source: Domestic Indices - NSE, BSE, FII / DII investment – NSE, Currency Movement - RBI, Reuters, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices - Reuters, IBSA, International Indices – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Financial websites **Abbreviations:** FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), MTD – Month to Date, YTD – Year to Date.



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