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# Weekly Market Update

## Jun 01, 2026 -Jun 05, 2026

AMFI Registered Mutual Fund Distributor

# DOMESTIC MARKETS

# EQUITY MARKET INDICES

| | BSE Sensex | Nifty 50 | BSE 150 Midcap | BSE 250 Smallcap |
|---|---|---|---|---|
| Jun 05, 2026 | 74243 | 23366 | 16282 | 6784 |
| May 29, 2026 | 74775 | 23547 | 16487 | 6770 |
| 1 Week change (%) | -0.71 | -0.77 | -1.24 | 0.21 |
| 1 Month change (%) | -4.77 | -3.96 | 0.43 | 0.57 |
| YTD Change (%) | -12.85 | -10.63 | -0.90 | 1.76 |

# SECTORAL INDICES

| | BSE Bankex | BSE Healthcare | BSE IT | BSE Auto | BSE FMCG | BSE Metal |
|---|---|---|---|---|---|---|
| Jun 05, 2026 | 61478 | 46908 | 28221 | 57632 | 17926 | 43212 |
| May 29, 2026 | 61131 | 46806 | 28165 | 57983 | 18264 | 43765 |
| 1 Week change (%) | 0.57 | 0.22 | 0.20 | -0.61 | -1.85 | -1.26 |
| 1 Month change (%) | -2.50 | 1.47 | -0.65 | -2.42 | -5.97 | 0.68 |
| YTD Change (%) | -8.12 | 7.26 | -23.62 | -8.74 | -9.19 | 16.43 |

# MARKET FUNDAMENTALS

| Ratios | BSE Sensex | Nifty 50 | Nifty Midcap 150 | Nifty Smallcap 250 |
|---|---|---|---|---|
| P/E | 20.09 | 20.17 | 28.48 | 33.77 |
| P/B | 3.98 | 3.09 | 4.71 | 3.62 |
| Dividend yield | 1.12 | 1.24 | 0.70 | 0.69 |

# FII AND DII NET BUYING (CASH)

| | FII (in Crores) | DII (in Crores) |
|---|---|---|
| | | |
| Jun 05, 2026 | -8776.25 | 9133.57 |
| | | |
| MTD-Jun 2026 | -31114.47 | 33933.05 |
| | | |
| YTD (2026) | -327829.67 | 418270.07 |

# KEY DEBT MARKET INDICATORS

| Debt indicators (%) | Jun 04, 2026 |
|---|---|
| Repo rate | 5.25% |
| Reverse repo rate | 3.35% |
| MSF rate | 5.50% |
| TREP | 5.04% |
| 10 Year Gilt | 6.99% |

| Debt indicators (%) | Jun 04, 2026 |
|---|---|
| 3 Month CD rate | 7.25% |
| 1 year CD rate | 7.76% |
| 3 Month CP rate | 7.30% |
| 5 Year Corp bond | 7.57% |

# KEY MACRO INDICATORS

| Key Macro indicators | |
|---|---|
| | |
| CPI | 3.48% (Apr-2026) |
| | |
| WPI | 8.30% (Apr-2026) |
| | |
| GDP growth rate | 7.80% (Oct-Dec 2025) |
| | |
| IIP | 4.90% (Apr-2026) |

# GLOBAL MARKETS

# GLOBAL EQUITY INDICES

| | Dow Jones (USA) | FTSE 100 (UK) | Nikkei (Japan) | Hang seng (HK) |
|---|---|---|---|---|
| Jun 05, 2026 | 50866 | 10368 | 66588 | 24961 |
| May 29, 2026 | 51032 | 10409 | 66329 | 25182 |
| 1 Week change (%) | -0.33 | -0.39 | 0.39 | -0.88 |
| 1 Month change (%) | 2.56 | 0.89 | 6.18 | -6.25 |
| YTD Change (%) | 5.13 | 4.19 | 28.47 | -5.23 |

# COMMODITIES

| Commodities | Brent Crude ($/BBL) | Gold (INR/10 GM) | Silver (INR/1 KG) |
|---|---|---|---|
| Jun 05, 2026 | 92.87 | 153959 | 257129 |
| May 29, 2026 | 91.12 | 155964 | 263371 |
| 1 Week Change (%) | 1.92 | -1.29 | -2.37 |
| 1 Month Change (%) | -15.85 | 4.72 | 6.95 |
| YTD Change (%) | 52.70 | 16.07 | 12.06 |

# MOVEMENT OF RUPEE VS OTHER CURRENCIES

| | US Dollar | British Pound | EURO | 100 Yen |
|---|---|---|---|---|
| Jun 05, 2026 | 95.00 | 126.74 | 109.46 | 59.29 |
| May 29, 2026 | 94.93 | 127.73 | 110.67 | 59.59 |
| 1 Week Change (%) | 0.07 | -0.78 | -1.09 | -0.50 |
| 1 Month Change (%) | -0.27 | -1.68 | -1.72 | -2.16 |
| YTD Change (%) | 5.72 | 4.78 | 3.78 | 3.33 |

# NEWS SUMMARY

# NEWS SUMMARY

- Indian equity markets closed the week lower on mixed global cues, and after the RBI MPC's announcement, on the back of downward revision in growth forecasts and hiked inflation projections. This overpowered the government's introduction of a retrospective tax exemption for Foreign Institutional Investors (FIIs) earning income from government securities. Key benchmark indices BSE Sensex and Nifty 50 lost 0.71% and 0.77% respectively. Broader markets indices, the BSE 150 Midcap lost 1.24% and BSE 250 Smallcap rose 0.21% respectively. On the BSE sectoral front, it was mixed. BSE Bankex was the major gainer, up 0.57% followed by Healthcare, up 0.22% and IT, up 0.20%. Fast Moving Consumer Goods was the major loser, down 1.85% followed by Metal, down 1.26%.

- Looking ahead, Domestic markets are expected to remain range-bound in the coming week as investors navigate a complex mix of domestic policy support and challenging global cues. While the RBI's latest measures to attract foreign capital and the government's tax relief for foreign investors in government securities have improved sentiment, concerns around elevated crude oil prices, the ongoing West Asia conflict, foreign institutional investor (FII) flows and the progress of the monsoon continue to keep market participants cautious.

- The RBI's Monetary Policy Committee (MPC) unanimously decided to hold the key policy repo rate at 5.25% with a neutral stance.

- The MPC lowered its FY27 real GDP projection to 6.6%, from 6.9% set in April. The central bank cut its quarterly path across the board, projecting Q1 growth at 6.6% (from 6.8%), Q2 at 6.3% (from 6.7%) and Q3 at 6.5% (from 7%), while pegging Q4 at 6.8%. Its FY26 growth estimate was retained at 7.6%.

# NEWS SUMMARY

- The CPI inflation for FY27 is now projected at 5.1%, which is a 50 bps jump from the central bank's previous forecast. MPC's inflation forecast has an upside bias. The risks of inflation are amplified, according to RBI Governor.

- Government data showed that India's fiscal deficit for the period from Apr to Mar of FY26 stood at Rs. 15.19 lakh crore or 97.5% of the Revised Estimates (RE) of the current fiscal. India's fiscal deficit was at 100.3% of the RE in the corresponding period of the previous fiscal year. Total expenditure stood at Rs. 49.05 lakh crore or 98.8% of the RE as compared to 98.7% of the RE in the corresponding period of the previous fiscal year

- The Index of Industrial Production (IIP) expanded by 4.9% YoY in Apr 2026, up from a revised 3.2% in Mar 2026, under the revised IIP series with 2022– 23 as the base year. Growth was led by the manufacturing sector, which recorded a 6.2% increase compared with a year earlier.

- The Manufacturing Purchasing Managers' Index (PMI) rose to 55.0 in May 2026 from 54.7 in Apr 2026. Growth was driven by faster gains in new orders, output, and purchasing activity, led by domestic demand as exports softened. Sales were supported by intermediate and capital goods, amid infrastructure spending and new business wins.

- Total gross Goods and Services Tax (GST) collections moderated to Rs 1.94 lakh crore in May 2026, although revenues remained 3.2% higher than the Rs 1.88 lakh crore collected in the same month last year.

# NEWS SUMMARY

- Bond yields declined after the central government announcement of tax relief on government securities to foreign investors. Yield on the 10-year benchmark paper (6.48% GS 2035) fell by 3 bps to close at 6.97% as compared to the previous week's close of 7.00%.

- India's Services Purchasing Managers' Index (PMI) hit a six-month high of 59.8 in May 2026, up from 58.8 in Apr 2026, driven by a surge in domestic demand, particularly in e-commerce, entertainment, and information technology.

- US equity market's remarkable nine-week winning streak ended abruptly after a stronger-than-expected US jobs report reignited concerns that the Federal Reserve could keep interest rates elevated for longer, even as geopolitical tensions in the Middle East and rising oil prices added to market uncertainty. For the week, the S&P 500 declined more than 2.6%, its first negative weekly performance in 10 weeks. The Nasdaq tumbled 4.5%, while the Dow posted a modest weekly loss.

- Asian equity markets mostly declined as investors pulled back from technology and semiconductor shares following a weak forecast from U.S. chipmaker Broadcom. Meanwhile, ongoing tensions between Washington and Tehran kept oil prices elevated, raising concerns about inflation and interest rates.

- European equity markets closed lower as fading hopes of a U.S.-Iran ceasefire weighed on investor sentiment. Rising oil prices and renewed geopolitical tensions pressured risk appetite.

- China's Services Purchasing Managers' Index rose to 54.4 in May 2026 from 52.6 in the previous month, according to survey data from S&P Global.

# NEWS SUMMARY

- The U.S. manufacturing PMI rose to 54.0 in May 2026 from 52.7 in Apr 2026, according to the Institute for Supply Management
- The Indian rupee weakened against the U.S. dollar as heightened geopolitical tensions between the U.S. and Iran drove energy market volatility and increased safe-haven demand.
- Gold prices declined as expectations of sustained higher interest rates, driven by inflation concerns, outweighed investor focus on Middle East developments and upcoming economic data.
- Brent crude oil prices (spot) rose as the U.S. and Iran launched fresh strikes and Israel ordered troops to push deeper into Lebanon.

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