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Weekly Market Update

Jun 15, 2026 -Jun 19, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Jun 19, 2026	76802	24013	16753	7047
Jun 12, 2026	75527	23622	16226	6798
1 Week change (%)	1.69	1.66	3.25	3.66
1 Month change (%)	2.15	1.52	3.14	6.01
YTD Change (%)	-9.84	-8.16	1.97	5.69

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Jun 19, 2026	65072	47844	26829	58670	18414	42051
Jun 12, 2026	63987	47388	27167	57912	18139	42004
1 Week change (%)	1.70	0.96	-1.24	1.31	1.52	0.11
1 Month change (%)	8.10	-0.03	-4.71	2.53	-0.77	-2.36
YTD Change (%)	-2.75	9.40	-27.38	-7.09	-6.73	13.30

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	20.76	20.71	29.40	35.07
P/B	4.11	3.16	4.84	3.74
Dividend yield	1.26	1.39	0.67	0.66

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Jun 19, 2026	4859.07	-1159.64
MTD-Jun 2026	-43044.09	65055.41
YTD (2026)	-339759.29	449392.43

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Jun 18, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.04%
10 Year Gilt	6.84%

Debt indicators (%)	Jun 18, 2026
3 Month CD rate	6.55%
1 year CD rate	7.45%
3 Month CP rate	6.65%
5 Year Corp bond	7.30%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	3.93% (May-2026)
WPI	9.68% (May-2026)
GDP growth rate	7.80% (Mar 2026)
IIP	4.90% (Apr-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Jun 19, 2026	51564	10363	71250	23924
Jun 12, 2026	51202	10471	66020	24718
1 Week change (%)	0.71	-1.03	7.92	-3.21
1 Month change (%)	2.54	-0.77	15.51	-5.76
YTD Change (%)	6.58	4.14	37.46	-9.16

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Jun 19, 2026	80.57	144606	231829
Jun 12, 2026	86.71	147367	241306
1 Week Change (%)	-7.08	-1.87	-3.93
1 Month Change (%)	-24.50	-8.68	-13.61
YTD Change (%)	13.98	9.02	1.04

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Jun 19, 2026	94.38	124.92	108.27	58.51
Jun 12, 2026	95.16	127.56	110.07	59.40
1 Week Change (%)	-0.82	-2.07	-1.64	-1.50
1 Month Change (%)	-1.99	-3.42	-3.53	-3.46
YTD Change (%)	5.03	3.27	2.65	1.97

NEWS SUMMARY

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- Indian equity markets extended their recovery during the week, supported by falling crude oil prices and a strengthening rupee, amid optimism over U.S.– Iran peace efforts following the signing of a framework to end their three-month conflict. Key benchmark indices BSE SENSEX and Nifty 50 gained 1.69% and 1.66% respectively. Broader markets outperformed the benchmarks during the week. BSE 150 Midcap and BSE 250 Smallcap gained 3.25% and 3.66% respectively. On the BSE sectoral front, Most ended on positive note. BSE Bankex was the major gainer, up 1.70% followed by FMCG, up 1.52% and Auto, up 1.31%. Information technology was the major loser, down 1.24%.

- Looking ahead, Investor attention in the week ahead is likely to remain firmly focused on developments surrounding the US-Iran peace process. Crude oil prices will remain a key variable, with continued stability supporting India's macroeconomic outlook, while any deterioration in Middle East relations could reignite volatility.

- India’s wholesale price index (WPI)-based inflation rose 9.68% YoY in May 2026, accelerating from a marginally revised 8.26% increase in Apr 2026, with food and fuel prices remaining elevated amid ongoing US–Iran conflict-driven pressures on crude oil and global supply chains.

- India’s Consumer Price Index (CPI)-based inflation rose to 3.93% in May 2026 from 3.48% in Apr 2026, driven largely by higher food prices. Consumer food price inflation increased to 4.78% in May 2026 from 4.20% in Apr 2026.

- The government ratified an 8.25% Employees’ Provident Fund (EPF) interest rate for FY26, with credits to over 7 crore subscribers expected this month.

NEWS SUMMARY

- India will allow imports of 3.78 lakh United Kingdom cars at concessional duty over 15 years under a trade pact, with tariffs cut from 110% to 10% under a quota system.

- Bond yields declined on lower crude oil prices after the U.S. and Iran released an interim agreement aimed at ending the war; however, gains were capped as the U.S. Federal Reserve kept interest rates unchanged in its Jun 2026 meeting while adopting a hawkish outlook. Yield on the 10-year benchmark paper (6.94% GS 2036) fell by 1 bps to close at 6.86% as compared to the previous week's close 6.87%.

- The RBI has temporarily relaxed interest rate norms on NRI deposits until Sep 30, 2026, allowing banks to offer higher returns on FCNR(B) and NRE accounts to attract overseas funds and boost foreign exchange inflows.

- India's merchandise trade deficit widened to $28.21 billion in May 2026, compared with $22.56 billion in May 2025. Exports increased 18.02% YoY to $ 45.20 billion, while imports rose 20.62% YoY to $ 73.41 billion over the same period.

- Asian equity markets closed on a mixed note, with Japanese and South Korean markets reaching fresh records on signs of easing geopolitical tensions and strong investor enthusiasm for artificial intelligence. while Nikkei rose by 7.92% and Hang Seng fell by 3.21% respectively.

- European equity markets mostly declined as investor sentiment weakened following a more hawkish stance from The U.S. Federal Reserve, which signaled potential rate hikes to address inflation. Rising bond yields and policy uncertainty weighed on risk appetite, offsetting earlier resilience amid mixed global economic cues.

NEWS SUMMARY

- The U.S. equity markets rose as a technology-led rebound lifted sentiment, supported by gains in AI sector stocks and resilient economic data, even as hawkish signals from the U.S. Federal Reserve and expectations of potential interest rate increases kept investors cautious about the policy outlook.

- The Federal Reserve, on Jun 17, 2026, announced its widely expected decision to leave interest rates unchanged. The Fed said it would maintain the target range for the federal funds rate at 3.50% to 3.75%, citing its dual goals of maximum employment and inflation at a rate of 2% over the longer run.

- U.K. real gross domestic product contracted by 0.1% in Apr 2026, in contrast to a 0.3% expansion in Mar 2026, according to the Office for National Statistics.

- The Indian rupee strengthened against the U.S. dollar, supported by easing tensions in West Asia and the extended decline in crude oil prices.

- Gold prices fell as easing geopolitical tensions offset pressure from a stronger dollar and higher Treasury yields.

- Brent crude oil prices declined sharply after the United States and Iran reached an initial agreement to end their conflict.

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