

WEEKLY YIELD

Update of Equity & Debt Market

June 12, 2026

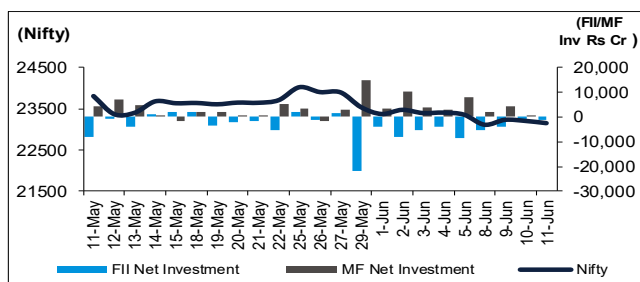


DOMESTIC EQUITY

- Indian equities ended higher on a weekly basis, supported by Friday's sharp gains owing to easing geopolitical uncertainties, lower crude oil prices and improved global risk sentiment. However, there were losses due to persistent foreign fund outflows and profit booking in information technology (IT) stocks. The BSE Sensex and Nifty 50 rose 1.73% and 1.10%, respectively.
- Most of the sectors ended higher this week. IT, metal and power stocks declined the most, dragged down by profit booking and artificial intelligence-led disruptions. BSE IT, BSE Metal and BSE Power fell 3.73%, 2.80% and 2.64%, respectively.
- Bankex, fast moving consumer goods (FMCG) and healthcare stocks gained during the week owing to supportive global cues. BSE Bankex, BSE FMCG and BSE Healthcare gained 4.08%, 1.19% and 1.02%, respectively.

| Broad Indices | Week change% | 3 month change% | 1 year change% |
|----------------|--------------|-----------------|----------------|
| BSE Sensex | 1.73 | -0.67 | -7.55 |
| Nifty 50 | 1.10 | -0.07 | -5.08 |
| BSE Midcap | -0.41 | 6.50 | 0.67 |
| BSE Smallcap | 0.40 | 15.25 | 0.04 |
| BSE Bankex | 4.08 | 3.24 | 1.23 |
| BSE CG | -1.40 | 13.18 | 13.07 |
| BSE FMCG | 1.19 | 2.44 | -10.45 |
| BSE IT | -3.73 | -5.17 | -28.27 |
| BSE Healthcare | 1.02 | 8.47 | 7.80 |

Source: BSE, NSE Past performance may or may not be sustained in the future



Source: SEBI, NSE Past performance may or may not be sustained in the future



GLOBAL EQUITY

- Unites States (US) stocks performed mixed during the week. Markets, especially the Dow Jones, declined due to a selloff in semiconductor stocks. However, a rally in the Nasdaq cushioned the further fall.
- Britain's FTSE 100 declined over the week as disappointing United Kingdom (UK) house price data for May 2026 added to concerns about higher borrowing costs. In addition, equity selling pressure led to further losses.
- Japan's Nikkei index ended lower, weighed down by a decline in exporter stocks amid a stronger yen. However, some losses were limited after de-escalation in the conflict in West Asia, which offset a sell-off in chip stocks.
- Hong Kong's Hang Seng Index ended lower during the week, weighed down by a decline in technology stocks. However, losses were tempered after the developments in West Asia.
- China's Shanghai Composite closed the week higher, boosted by stock-specific gains and optimism over the developments in West Asia.



DOMESTIC DEBT

| Indicators | June 12, 2026 | Previous Week | Trend |
|--------------|---------------|---------------|-------|
| Call Rate | 5.20% | 5.35% | ↓ |
| 3 M CP | 7.40% | 7.75% | ↓ |
| 3 M CD | 6.86% | 7.10% | ↓ |
| 1 Yr CD | 7.60% | 7.70% | ↓ |
| 1 Yr CP | 8.00% | 8.05% | ↓ |
| 1 Yr G-Sec* | 6.01% | 6.01% | ↔ |
| 5 Yr AAA | 7.47% | 7.69% | ↓ |
| 5 Yr G-Sec* | 6.49% | 6.65% | ↓ |
| 10 Yr G-Sec* | 6.89% | 6.98% | ↓ |
| USD/INR | 95.38 | 95.40 | ↑ |

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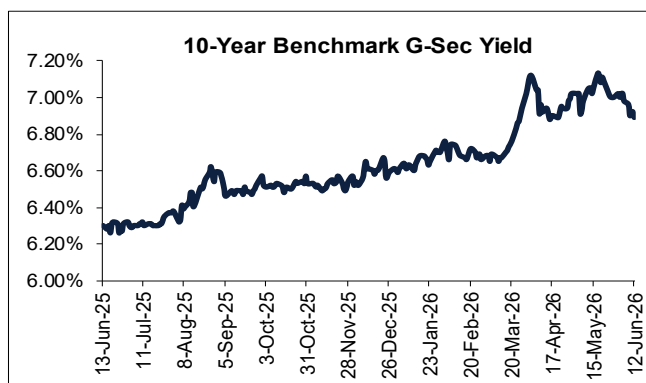
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Source: CRISIL Fixed Income Database, RESERVE BANK OF INDIA
*Weighted Average Yield

Past performance may or may not be sustained in the future

- The yield on the 10-year benchmark 6.48% GS 2035 paper closed lower at 6.89% on June 12, 2026 compared with 6.98% on June 5, 2026.
- Yield declined sharply earlier in the week as the Reserve Bank of India unveiled a series of measures to attract foreign investment.
- Later in the week, the yield declined further following a drop in global crude oil prices on revived hopes of de-escalation in the conflict in West Asia.
- Next week, debt investors will focus on India's Wholesale Price Index-based inflation data for May 2026, alongside crude oil prices and global bond yield trends, for signals on inflationary pressures and the domestic bond market outlook.



Source: CRISIL Fixed Income Database

Past performance may or may not be sustained in the future



GLOBAL DEBT

- US 10-year Treasury yields declined during the week as easing concerns over energy-driven inflation reduced upward pressure on long-term interest rates
- Geopolitical developments in West Asia eased fears of significant disruption to global oil supplies, helping stabilise crude oil prices. This reduced the

inflation risk premium embedded in long-term treasury yields.

- The benchmark US 10-year Treasury yield declined to 4.45% on June 11, 2026, from 4.55% on June 5, 2026.



DOMESTIC NEWS

- The World Bank has projected India's gross domestic product (GDP) growth at 6.6% in fiscal 2027, down from an estimated 7.7% in fiscal 2026. The moderation reflects a slowdown in private demand growth as higher crude oil, natural gas and fertiliser prices feed into broader input costs.
- India's retail inflation rose to 3.93% in May 2026 compared to 3.48% in April 2026, driven by higher food and fuel prices, though remaining within RBI's target range.
- The Union Cabinet cleared the Rs 2,169 crore Ahmedabad Metro Phase 2A extension to the international airport, aiming to enhance urban connectivity and support metro rail infrastructure growth.
- The Centre has exempted petrol blended with higher proportions of ethanol from central excise duty.
- The Centre announced an interim allocation of Rs 95,692 crore under the newly introduced the Viksit Bharat – Guarantee for Rozgar and Ajeevika Mission (Gramin) scheme for a seamless transition
- The Reserve Bank of India (RBI) expanded the universe of fully accessible route securities by including all new issuances of 15-, 30- and 40-year government securities (GS), and removed limits on short-term investment, concentration and individual securities under the general route.
- The Reserve Bank of India opened a special window to enhance returns on non-resident Indian dollar deposits, making foreign currency non-resident deposits more attractive and supporting foreign currency inflows into the country.

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- The Securities and Exchange Board of India (SEBI) proposed consolidated disclosure norms for executive pay at asset management companies, enhancing transparency and governance in the mutual fund industry.
- Securities and Exchange Board of India proposed a new mechanism to harmonise price bands and pre-open auction prices for stocks listed on multiple exchanges, aiming to address price divergences that arise when a stock remains untraded on one exchange but continues to trade on another.



GLOBAL NEWS

- The World Bank cut its global growth forecast for 2026 to 2.5% due to the war in the Middle East, warning that growth could slow further to 1.3% if energy supply disruptions intensify and financial market stress rises.
- US producer prices accelerated to 6.5% year-on-year in May 2026, up from a downwardly revised 5.7% in April 2026.
- The US unemployment rate remained unchanged at 4.3% in May 2026, indicating a stable labor market.
- US annual inflation rose to 4.2% in May 2026, up from 3.8% in April 2026, while core inflation increased to 2.9% from 2.8%.
- US consumer inflation expectations declined slightly to 3.5% in May 2026, compared to 3.6% in April 2026.
- The US trade deficit narrowed to \$55.9 billion in April 2026, down from a revised \$56.6 billion in March 2026, as exports rose 2.6% to a record \$327.1 billion, while imports increased 2.0% to \$383.0 billion.
- The Eurozone economy expanded by 0.3% in quarter one (Q1) 2026, slowing significantly from 1.2% growth in quarter four (Q4) 2025.
- The European Central Bank raised its key interest rates by 25 basis points in June 2026, bringing the main refinancing rate to 2.40%, the deposit facility rate to 2.25%, and the marginal lending facility rate to 2.65%, to reinforce its commitment to stabilizing inflation at its 2% medium-term target.
- China's trade surplus narrowed to \$84.82 billion in April 2026, down from \$95.85 billion a year earlier, as exports surged 14.1% to a record \$359.44 billion while imports jumped 25.3% to \$274.62 billion, marking a second consecutive monthly record.
- China's annual inflation remained steady at 1.2% in May 2026, unchanged from April 2026.
- China's producer prices rose 3.9% year-on-year in May 2026, up from 2.8% in April 2026.
- Japan's producer prices increased 6.3% in May 2026, accelerating from an upwardly revised 5.3% in April 2026.
- The Japanese economy expanded at an annualized rate of 1.8% in Q1 2026, compared to a downwardly revised 0.7% in Q4 2025.
- Japan's bank lending grew 5.7% year-on-year in May 2026, up from 5.4% in April 2026.
- Japan's coincident economic index rose to 117.9 in April 2026, up from a revised 116.8 in March 2026, while the leading economic index increased to 115.9 from 115.4.

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| DAY | |
|--------------------------|--|
| Monday, June 15, 2026 | <ul style="list-style-type: none"> • US Industrial Production, May 2026 • US Manufacturing Production, May 2026 • Eurozone Balance of Trade, April 2026 • Eurozone Industrial Production, April 2026 • India WPI Inflation, May 2026 • India Unemployment Rate, May 2026 |
| Tuesday, June 16, 2026 | <ul style="list-style-type: none"> • US Export/Imports Prices, May 2026 • China House Price Index, May 2026 • China Industrial Production, May 2026 • China Retail Sales, May 2026 • China Unemployment Rate, May 2026 • Japan BoJ Interest Rate Decision • India Balance of Trade, May 2026 • India Exports/Imports, May 2026 |
| Wednesday, June 17, 2026 | <ul style="list-style-type: none"> • US Fed Interest Rate Decision • US Retail Sales, May 2026 • Eurozone Inflation Rate YoY Final, May 2026 • UK Inflation Rate, May 2026 • UK PPI Input, May 2026 • UK Retail Price Index, May 2026 • Japan Balance of Trade, May 2026 • Japan Exports/Imports, May 2026 |
| Thursday, June 18, 2026 | <ul style="list-style-type: none"> • US Initial Jobless Claims, Jun 13, 2026 • Eurozone Construction Output, April 2026 • Eurozone Current Account, April 2026 • UK BoE Interest Rate Decision • UK Unemployment Rate, April 2026 |
| Friday, June 19, 2026 | <ul style="list-style-type: none"> • UK Retail Sales, May 2026 • UK GfK Consumer Confidence, June 2026 • Japan Inflation Rate, May 2026 |

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Source: CRISIL

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