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Monthly Market Update

June 2026 — India & Global Markets Review

Market Update — June 2026

🌍 Geopolitics — US-Iran Peace Understanding

- US-Iran ceasefire eased tensions; no formal deal signed yet.
- Safe-haven demand fell; risk-on sentiment briefly lifted global equities.

🛢️ Crude Oil — Sharp Correction Below $80

- Brent fell **below US$80/barrel**, easing global inflation concerns.
- Lower crude improved the outlook for oil-importers, especially India.

💱 Rates, Dollar & Currency — Hawkish Fed

- Fed held rates **unchanged**, signaled **higher for longer** – Dollar Index strengthened.
- Stronger dollar pressured EM currencies and capped global risk-asset gains.

🥇 Gold — Correction Resumed

- Brief rebound on peace news, then **correction resumed** as risks eased and dollar strengthened.

🌐 Global Equity Markets

- Rallied on **easing tensions and lower oil**.
- **Hawkish Fed and stronger dollar** capped gains, keeping investors cautious.
- **Emerging markets mixed** as dollar strength weighed on flows.

🇮🇳 Domestic Markets — RBI Measures & Resilience

- RBI deployed three forex-support measures: higher FCNR rate ceiling, hedging relief, and FCNR exemption from CRR/SLR.
- Indian equities rebounded on easing geopolitics, lower crude, and domestic resilience.
- GST collections rose **13.9% YoY to ₹1.95 lakh crore**; rising inflation kept RBI cautious.

June 2026: easing geopolitics, lower oil, and resilient domestic data supported Indian equities — offset by a hawkish Fed, stronger dollar, and rising inflation warranting caution.

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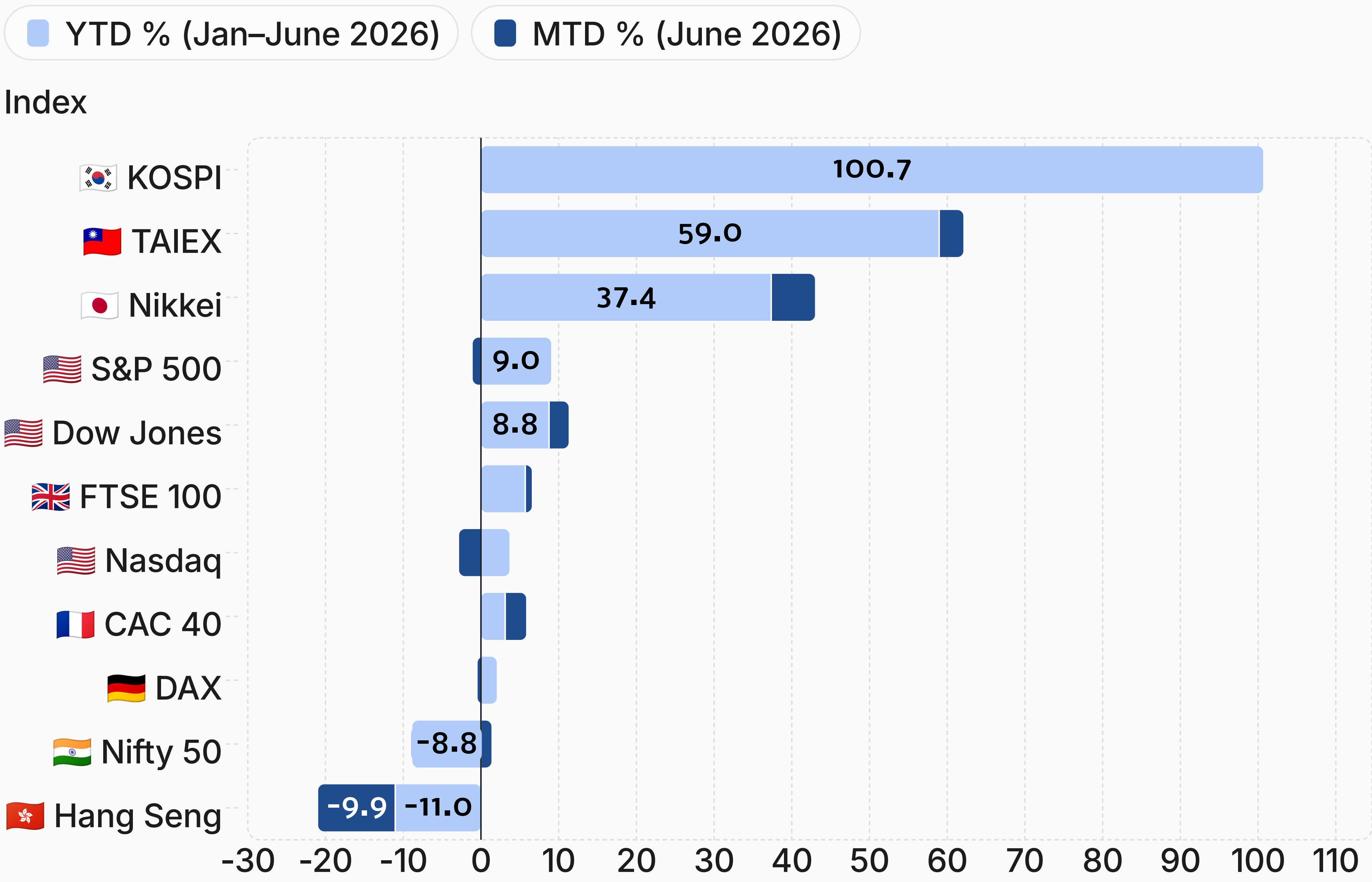
Global Market Snapshot



🇭🇰 **Hang Seng** was the month's laggard (**−9.91% MTD, −11.03% YTD**) on persistent China headwinds.

🇯🇵 **Nikkei** and 🇰🇷 **KOSPI** led YTD gains at **+37.35%** and **+100.65%** respectively; 🇹🇼 **TAIEX** also impressed at **+58.96% YTD**.

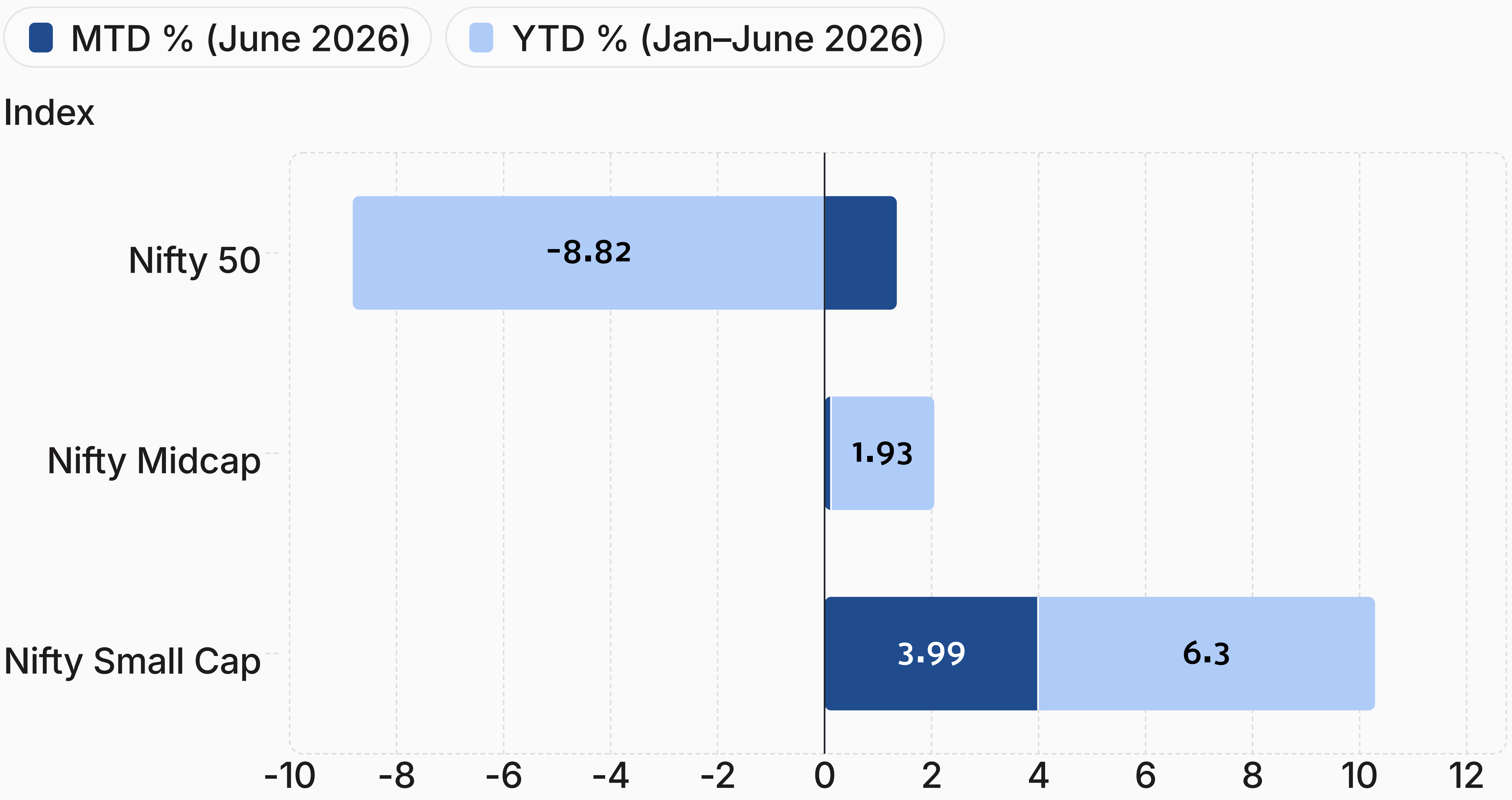
🇺🇸 US markets were mixed – Dow gained while S&P 500 and Nasdaq slipped as the hawkish Fed weighed on growth stocks; European markets broadly mixed.

🇮🇳 **Nifty 50** recovered **+1.35% MTD** on easing geopolitical tensions and lower crude oil prices.

June's global markets were mixed — Asian tech leaders (Nikkei, KOSPI, TAIEX) dominated YTD, Hang Seng bore China-driven losses, and a hawkish Fed capped US indices while India staged a modest recovery.

Source: NGEN Markets

Indian Equity Markets



🇮🇳 Indian large caps staged a recovery in June – Nifty 50 rose **+1.35% MTD** as easing geopolitical tensions and lower crude improved sentiment, though YTD remains at **-8.82%**.

🔹 **Small Caps** outperformed meaningfully, gaining **+3.99% MTD** and extending YTD gains to a healthy **+6.30%**.

📈 **Mid Caps** showed modest gains of **+0.12% MTD**, with YTD returning to positive territory at **+1.93%**.

📊 The broader market's outperformance over large caps continues to reflect selective domestic demand strength and resilient retail participation.

June 2026 brought a broad-based recovery across Indian equities. Small Caps led the charge with +3.99% MTD. Nifty 50 rebounded in in June after a brief correction in May, supported by easing oil prices, geopolitical calm and favorable domestic factors.

Source: NGEN Markets

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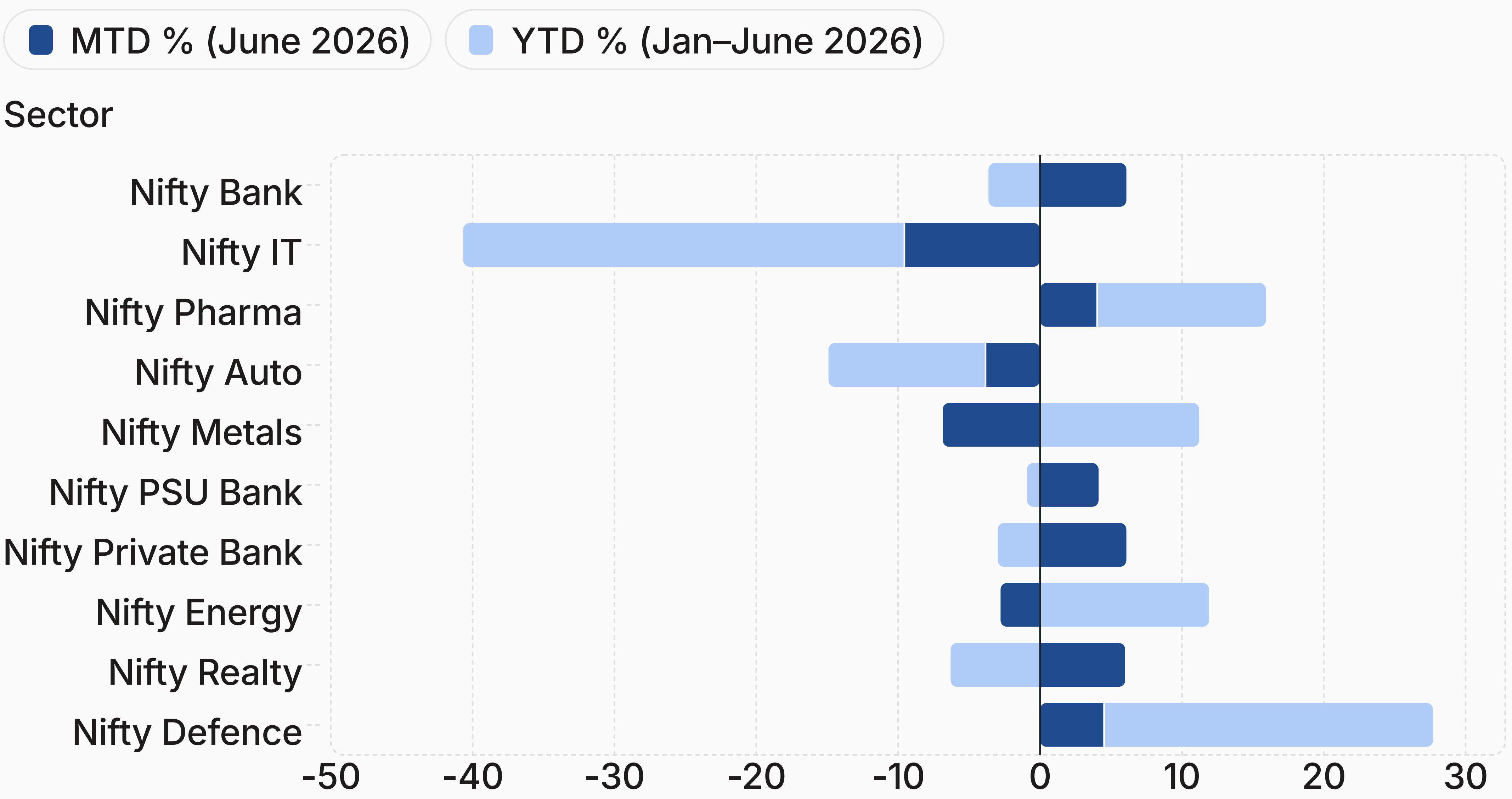
Sectoral Performance



🏦 **Banking led June's rally** – Nifty Bank and Nifty Private Bank surged **+6.09% MTD** each, while PSU Banks gained **+4.13% MTD** on improved credit outlook and rate stability.

🏘️ **Nifty Realty** rebounded sharply at **+6.01% MTD** as lower oil and easing financial conditions improved sentiment.

🛡️ **Nifty Defence** gained **+4.52% MTD**, extending its YTD dominance to **+23.19%** – the strongest YTD performer.

💊 **Nifty Pharma** continued its consistent performance with **+4.03% MTD** and a solid **+11.90% YTD**.

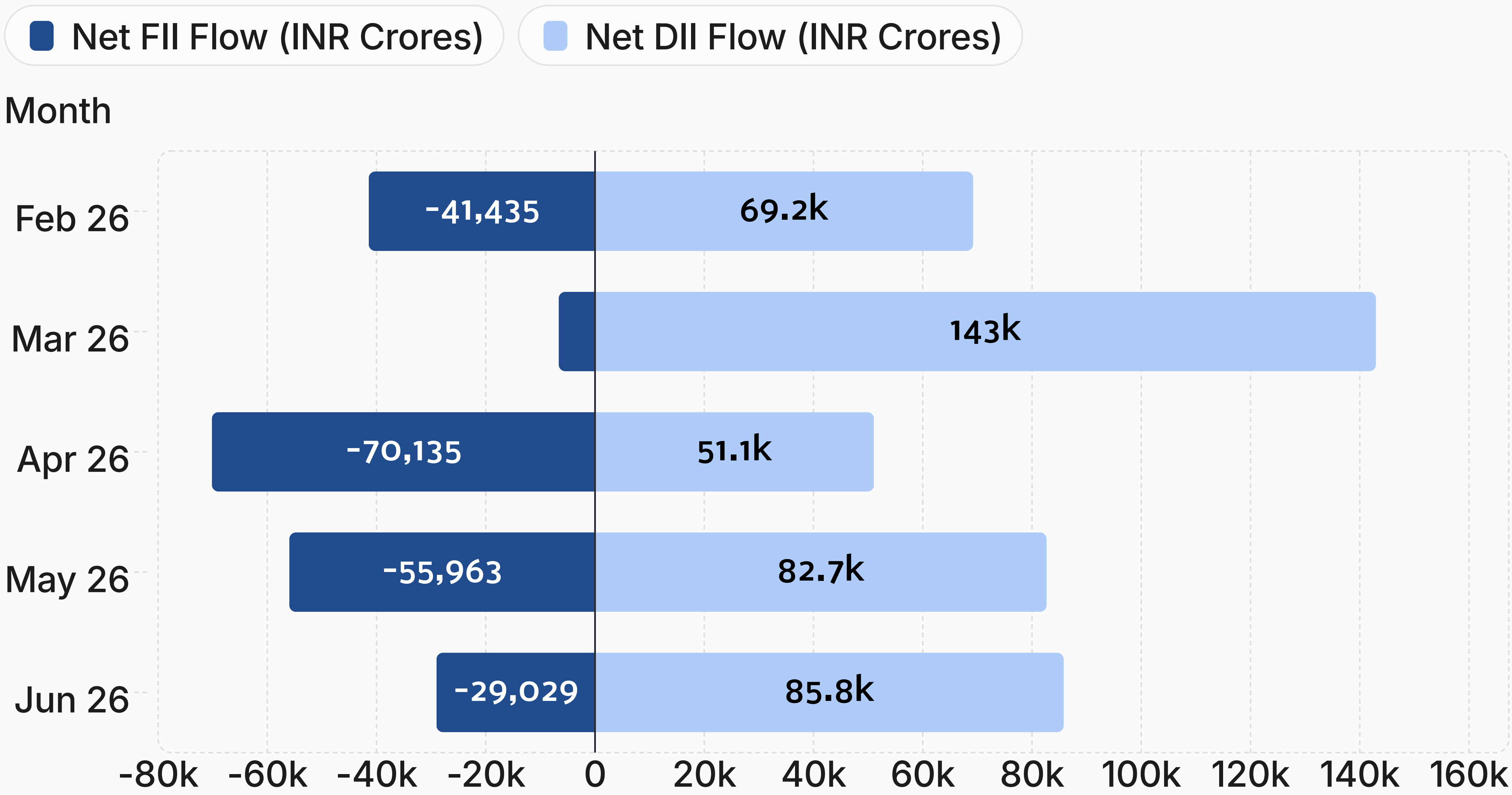
🪙 **Nifty Metals** reversed course sharply at **-6.86% MTD** as commodity prices corrected alongside oil. YTD remains positive at **+11.22%**.

💻 **Nifty IT** was the worst performer at **-9.56% MTD**, deepening its YTD loss to a stark **-31.10%** – a continued structural drag.

📝 **Banking, Realty, and Defence are June's key themes driven by rate stability, easing macro risks, and sustained government spending. IT's -31.10% YTD demands close monitoring. Metals reversed sharply, while Defence's YTD leadership remains intact.**

Source: NGEN Markets

FII / DII Trend



💸 **FIIs remained net SELLERS** in June 2026 with outflows of **-₹29,029 Cr** – though the pace of selling moderated notably from May's **-₹55,963 Cr**.

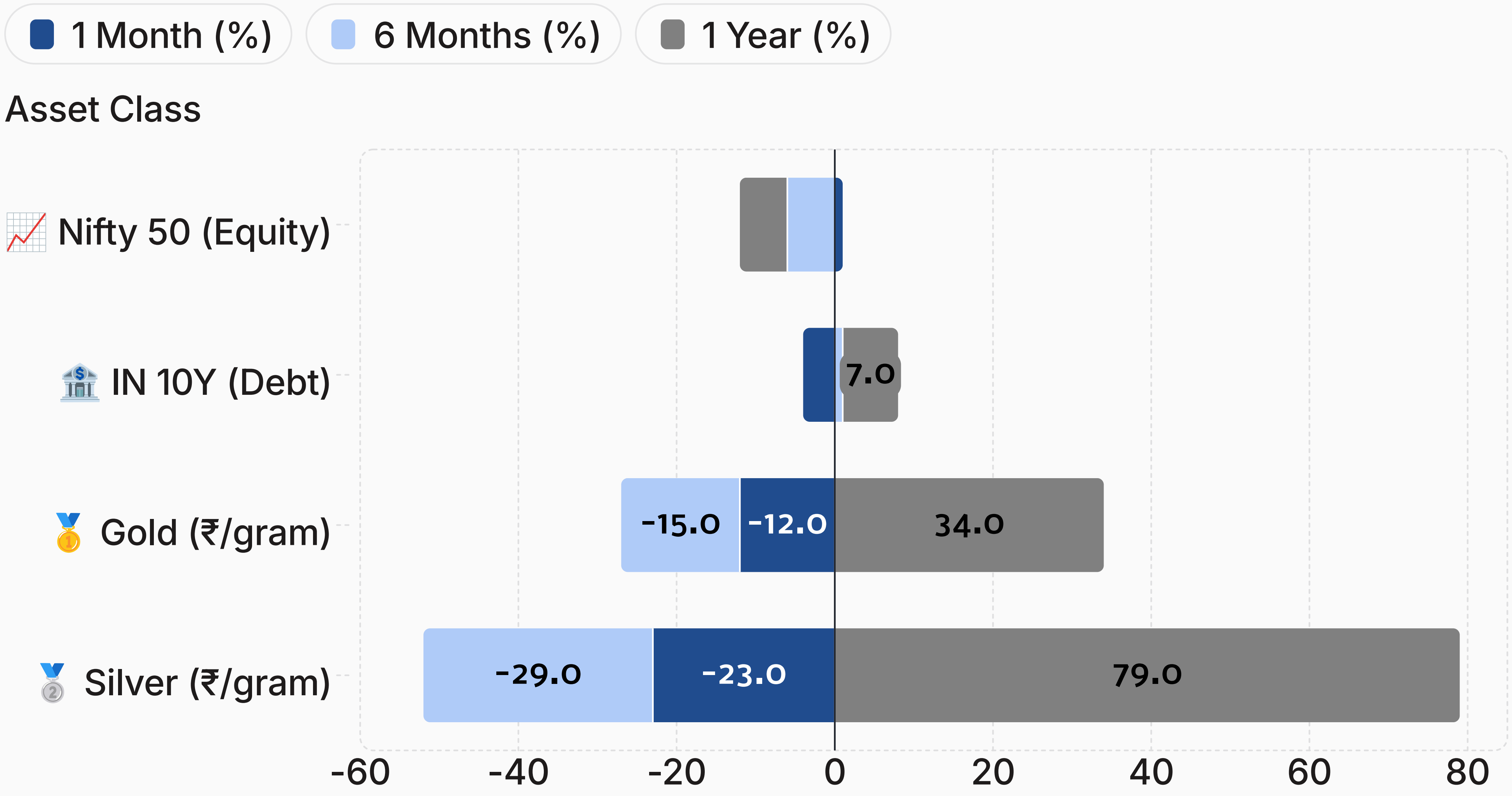
🇮🇳 **DII inflows** of **₹85,800 Cr** remained robust, continuing to comfortably offset FII selling and providing a strong domestic cushion.

June 2026 saw FII outflows moderated— a significant improvement from prior months as easing geopolitics and lower oil improved India's macro backdrop. DII inflows remain strong, underlining the resilience of India's domestic investor base.

Source: **https://www.moneycontrol.com**

Asset Class Performance

Precious metals corrected sharply in June as geopolitical risks eased and the dollar strengthened. Equity staged a recovery. Debt delivered steady returns while silver's extraordinary 1-year run moderated significantly.



🥈 **Silver corrected sharply at -23% in 1 month** and **-29% over 6 months**, though its 1-year return of **+79%** still significantly outperforms all other asset classes.

🥇 **Gold fell -12% in the month** and **-15% over 6 months** as easing geopolitical risks and a stronger dollar reduced safe-haven appeal. 1-year return of **+34%** remains strong.

📈 **Equity (Nifty 50) rose +1% in June**, though it remains negative at **-6% over 1 year** and **-6% over 6 months**.

🏦 **Debt (IN 10Y) delivered +7% over 1 year**, continuing to outperform equity and providing stable returns for conservative allocators.

🗒 **June marked a sharp reversal for precious metals — a reminder that even multi-year winners can correct. Diversification across equities, debt, and metals remains critical. Debt's steady 7% 1-year return rewards conservative allocators while equity begins its recovery.**

Source: **https://in.tradingview.com**

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Mutual Fund Performance - Factor Wise

Rank	1 Month	3 Months	6 Months	1 Year	3 Year	5 Year	10 Year
1	Alpha 3.62%	Alpha 17.93%	Alpha 5.67%	Value 12.35%	Alpha 4.57%	Value 27.69%	Value 23.77%
2	Momentum 3.06%	Momentum 11.92%	Value 1.38%	Alpha 0.34%	Low Volatility 1.57%	Alpha 20.18%	Low Volatility 14.66%
3	Low Volatility 1.81%	Low Volatility 6.42%	Low Volatility -2.34%	Low Volatility -2.72%	Momentum -2.93%	Momentum 13.37%	Momentum 11.55%
4	Quality -2.06%	Quality 4.48%	Momentum -2.93%	Momentum -2.93%	Quality -6.87%	Quality -8.18%	Quality 8.18%
5	Value -2.35%	Value 6.20%	Quality -9.05%	Quality -2.74%	Value -6.40%	Low Volatility 10.99%	Value 9.31%

🏆 **Alpha** led factor performance across the short-to-medium term, reflecting strong stock selection.

💎 **Value** emerged as the strongest long-term performer despite recent underperformance.

📉 **Momentum** delivered mixed results, highlighting its cyclical nature across market phases.

🛡️ **Low Volatility** remained a steady defensive factor, while **Quality** continued to lag peers.

🗒️ **Alpha dominated short-to-medium term factor rankings while Value proved the standout long-term compounder despite short-term weakness. Momentum remained volatile across horizons, Quality was the persistent laggard, and Low Volatility offered consistent defensive ballast.**

Source: NGEN Markets

Mutual Fund Category Performance — Equity

Rank	1 Month	3 Months	6 Months	1 Year	3 Year	5 Year
1	Small Cap 6.19%	Small Cap 21.07%	Small Cap 8.16%	Small Cap 6.26%	Mid Cap 18.82%	Small Cap 17.06%
2	Multi Cap 4.06%	Multi Cap 14.43%	Mid Cap 2.86%	Mid Cap 4.16%	Small Cap 17.68%	Mid Cap 16.37%
3	Flexi Cap 3.77%	Flexi Cap 11.66%	Multi Cap 0.97%	Multi Cap 1.85%	Multi Cap 16.15%	Multi Cap 14.50%
4	Mid Cap 3.72%	Mid Cap 15.70%	Large & Mid -1.12%	Large & Mid 0.64%	Large & Mid 15.29%	Large & Mid 13.88%
5	Large & Mid 3.49%	Large & Mid 12.22%	Flexi Cap -1.84%	Value 0.44%	Value 14.88%	Value 13.79%
6	ELSS 3.43%	ELSS 10.42%	Value -2.33%	Flexi Cap -0.66%	Flexi Cap 13.02%	ELSS 12.05%
7	Large Cap 2.94%	Large Cap 7.77%	ELSS -3.16%	ELSS -2.42%	Large Cap 12.67%	Flexi Cap 11.92%
8	Value 2.74%	Value 10.34%	Large Cap -3.66%	Large Cap -3.66%	Value 10.67%	Large Cap 10.25%

🚀 **Small Cap** continued to outperform across most time horizons, reinforcing its leadership despite bouts of volatility.

📈 **Mid Cap** remained a strong performer, particularly over the medium to long term, reflecting sustained earnings momentum.

💼 **Multi Cap** delivered consistent performance across periods, benefiting from diversification across market capitalizations.

🛡️ **Large & Mid** recovered after a weak six-month phase, with longer-term returns remaining healthy.

⚖️ **Value** lagged in the short term but demonstrated resilience over longer investment horizons.

📉 **Flexi Cap , Large Cap & ELSS** trailed peers, reflecting a relatively cautious market environment favoring broader and mid-sized opportunities.

Source: NGEN Markets

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Mutual Fund Category Performance — Debt

Rank	1 Month	3 Months	6 Months	1 Year	3 Year
1	**Medium Duration** 1.88%	**Medium Duration** 2.96%	**Medium Duration** 3.13%	**Money Market** 6.12%	**Medium Duration** 7.41%
2	**Corporate Bond** 1.77%	**Corporate Bond** 2.66%	**Money Market** 3.01%	**Medium Duration** 6.05%	**Corporate Bond** 7.16%
3	**Short Duration** 1.63%	**Short Duration** 2.45%	**Ultra Short Duration** 2.98%	**Ultra Short Duration** 5.95%	**Money Market** 7.02%
4	**Low Duration** 1.08%	**Money Market** 1.81%	**Low Duration** 2.85%	**Low Duration** 5.86%	**Short Duration** 6.99%
5	**Money Market** 1.00%	**Low Duration** 1.71%	**Corporate Bond** 2.80%	**Corporate Bond** 5.83%	**Low Duration** 6.91%
6	**Ultra Short Duration** 0.87%	**Ultra Short Duration** 1.70%	**Short Duration** 2.76%	**Short Duration** 5.30%	**Ultra Short Duration** 6.71%
7	**Liquid** -3.09%	**Liquid** -2.14%	**Liquid** -0.67%	**Liquid** 2.01%	**Liquid** 4.14%

🏆 **Medium Duration funds** led performance across most investment horizons.

💰 **Money Market funds** stood out over the 1-year period, reflecting the benefit of higher short-term interest rates.

📈 **Corporate Bond funds** funds delivered steady, consistent returns across periods.

⚠️ **Liquid funds** remained the weakest-performing debt category.

Source: NGEN Markets

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What Should Investors Do?

Stay Goal Oriented — Don't Chase Short-Term Noise

- Tune out monthly swings in oil, currency, and geopolitics
- US-Iran deal unsigned – global risks remain elevated
- Stay anchored to your long-term financial horizon

Continue SIPs — Moderation in FII Outflows is Encouraging

- FII selling easing; DII inflows strong at ₹85,800 Cr
- Stay disciplined with SIPs through volatility
- Accumulate in banking, defence, and pharma for the long term

Rebalance Precious Metals Exposure

- Gold and silver have corrected sharply – a buying opportunity
- Top up precious metals allocations at lower levels
- Keep a diversified mix across equities, debt, and commodities

Our View — June 2026: Cautious Optimism, Stay Disciplined

June 2026 brought geopolitical easing, an oil correction, and equity recovery – but a hawkish Fed, stronger dollar, and rising inflation demand disciplined navigation.

For Existing Investors

- **Stay invested** – moderating FII outflows and strong DII support signal improving confidence.
- **Favour** Banking, Defence, Pharma, and Realty; trim IT and Metals.
- **Top up precious metals** – Gold (-12%) and Silver (-23%) offer re-entry value.
- **Continue SIPs** for long-term wealth creation.

For New Investors

- **Start with SIPs** to ride India's recovery while managing volatility.
- **Diversify** across equities, debt, and precious metals after the correction.
- **Focus on** Banking, Defence, and Pharma – backed by GST collections of ₹1.95 lakh crore.

SIPs, selective positioning in Banking, Defence, and Pharma, and smart asset allocation are your edge in June 2026.

Disclaimer: *Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The views expressed here are for informational purposes only and should not be construed as investment advice. Past performance is not indicative of future returns. Please consult your financial advisor before making any investment decis**ions.***