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Weekly Market Update

Sep 28, 2026 –Oct 02, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Oct 01, 2026	71909	22421	15997	6909
Sep 25, 2026	73895	23140	16574	7145
1 Week change (%)	-2.69	-3.11	-3.48	-3.30
1 Month change (%)	-5.57	-6.08	-6.82	-4.41
YTD Change (%)	-15.59	-14.25	-2.63	3.63

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Oct 01, 2026	61356	49899	27198	56364	16651	39634
Sep 25, 2026	62833	51596	27143	59648	17375	41357
1 Week change (%)	-2.35	-3.29	0.20	-5.51	-4.17	-4.17
1 Month change (%)	-5.24	-2.71	-9.60	-8.37	-4.68	-4.96
YTD Change (%)	-8.30	13.92	-25.96	-10.74	-15.66	6.79

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	19.09	19.19	28.10	34.05
P/B	3.88	2.75	3.79	3.38
Dividend yield	1.15	1.23	0.72	0.62

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Oct 01, 2026	-9484.22	10041.84
MTD-Oct 2026	-9484.22	10041.84
YTD (2026)	-412551.70	649576.69

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Sep 30, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.07%
10 Year Gilt	7.19%

Debt indicators (%)	Sep 30, 2026
3 Month CD rate	6.59%
1 year CD rate	7.59%
3 Month CP rate	6.40%
5 Year Corp bond	7.77%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	4.82% (Aug-2026)
WPI	9.92% (Aug-2026)
GDP growth rate	7.80% (Jun 2026)
IIP	8.00% (Aug-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Oct 02, 2026	51176	10461	68309	23972
Sep 25, 2026	51828	10695	66364	24510
1 Week change (%)	-1.26	-2.19	2.93	-2.20
1 Month change (%)	-4.67	-3.41	6.38	-4.92
YTD Change (%)	5.78	5.13	31.79	-8.98

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Oct 02, 2026	102.72	147770	221443
Sep 25, 2026	97.44	151377	231793
1 Week Change (%)	5.42	-2.38	-4.47
1 Month Change (%)	6.92	-3.29	-4.18
YTD Change (%)	45.31	11.41	-3.49

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Oct 02, 2026	96.11	127.23	108.15	60.88
Sep 25, 2026	95.81	126.95	109.15	60.92
1 Week Change (%)	0.31	0.22	-0.92	-0.07
1 Month Change (%)	1.05	-1.27	-2.13	2.25
YTD Change (%)	6.96	5.18	2.54	6.10

NEWS SUMMARY

NEWS SUMMARY

- Indian equity indices extended their losing streak for the week and ended sharply lower as rising US 10-year Treasury yields, uncertainty over the US-Iran conflict and heightened volatility in Brent crude prices continued to weigh on investor sentiment. The Nifty 50 fell 3.11% during the holiday-shortened week, while the BSE Sensex declined 2.69%. The broader market indices, BSE 150 Midcap and BSE 250 Smallcap declined by 3.48% and 3.30%. On the BSE sectoral front, all indices ended the week lower except BSE IT, which gained 0.20% and snapped its four-week losing streak. BSE Auto was the major loser, down 5.51%, followed by FMCG and Metal, down 4.17%, Healthcare, down 3.29% and Bankex, down 2.35%.

- Looking ahead, Market participants will closely track the recent spike in bond yields to multi-year highs, US-Iran war, Crude oil prices, Q2FY27 results and RBI MPC meeting in the coming week. The most important event is the RBI Monetary Policy Committee meeting from October 5–7, with the policy decision on October 7. A Reuters poll showed around 60% of economists expecting a 25-bps hike, amid rising inflation, crude prices and rupee pressure.

- The Index of Industrial Production (IIP) grew 8.0% YoY in Aug 2026, accelerating from the upwardly revised 7.4% YoY growth recorded in Jul 2026. Manufacturing output expanded 9.0% YoY, up from the revised 8.2% YoY growth in Jul 2026, while the Mining & Quarrying sector contracted 5.6% YoY during the month.

- Bond yields increased as elevated global bond yields and strengthening expectations of RBI rate hikes weighed on sentiment. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 9 bps to close at 7.21% as compared to the previous week's close of 7.16%.

NEWS SUMMARY

- Government data showed that India's fiscal deficit for the period from Apr to Aug of FY27 stood at Rs. 7.10 lakh crore or 41.9% of the Budget Estimates (BE) of the current fiscal. India's fiscal deficit was at 38.1% of the BE in the corresponding period of the previous fiscal year. Total expenditure stood at Rs. 20.78 lakh crore or 38.9% of the BE as compared to 37.1% of the BE in the corresponding period of the previous fiscal year.

- According to data from the Department for Promotion of Industry and Internal Trade, India's foreign direct investment inflows rose 6% YoY to USD 19.81 billion in Apr-Jun FY27, with Singapore, Mauritius, and the U.S. emerging as the largest sources of investment.

- According to the RBI, the Ways and Means Advances limit for the central government has been set at Rs. 50,000 crore for Oct 2026 to Mar 2027 to address temporary mismatches in receipts and payments, with the RBI retaining the flexibility to revise the limit based on prevailing conditions.

- Trade between India and the UAE settled in local currencies has reached double-digit levels, the Commerce and Industry Minister said on Sep 28, 2026. Bilateral trade is also nearing pre-war levels and is expected to recover further in the coming months. The Minister added that businesses are increasingly recognizing the benefits of rupee-dirham settlements amid ongoing geopolitical disruptions.

- Finance Minister expressed confidence that India can achieve economic growth of over 10%, provided there is wider adoption of technology, innovation, and startup-driven solutions across sectors. She said such growth would accelerate India's journey towards Atmanirbhar Bharat and Viksit Bharat, though it would require sustained efforts from all stakeholders.

NEWS SUMMARY

- The U.S. equity markets declined during the week as rising Treasury yields and persistent interest rate concerns weighed on investor sentiment, reducing risk appetite and pressuring broader equities across major sectors. Both the Dow and S&P 500 recorded a fourth weekly decline in the past five, but the Nasdaq secured a weekly gain, its fifth in the last six. For the week, the S&P 500 shed 0.27%, the Nasdaq rose 0.45%, and the Dow fell 1.26%.

- European equity markets closed lower as higher oil prices, rising bond yields, and uncertainty over a potential U.S.-Iran agreement weighed on investor sentiment and risk appetite. The UK's FTSE 100 saw its steepest weekly drop since April on Friday, hurt by a sell-off in government bonds that pushed yields higher and dented risk appetite. The blue-chip FTSE 100 index fell 2.2% for the week.

- Asian equity markets mostly declined as rising crude oil prices, higher bond yields, and Middle East tensions increased concerns over inflation and further interest rate hikes.

- Euro zone inflation surged more than expected in September and is likely to increase further in the coming months on soaring energy costs, keeping pressure on the European Central Bank to raise interest rates and governments to help struggling consumers. Inflation in the 21 nations sharing the euro currency jumped to 3.8% in September from 3.2% a month earlier.

- China’s industrial profits rose 4.2% YoY in Aug 2026 as against 11.2% YoY increase in Jul 2026, according to the National Bureau of Statistics.

- U.S. new home sales rose 6.4% to an annual rate of 684,000 in Aug 2026 after falling 4.3% to an upwardly revised rate of 643,000 in Jul 2026, as per the Commerce Department.

NEWS SUMMARY

- The Bank of Japan's (BOJ) 30-31 July policy meeting minutes showed that several policymakers favored faster interest rate hikes due to rising inflation risk. Members noted that inflation is approaching the BOJ's 2% target, shifting the focus toward controlling price pressures.

- The Indian rupee fell against the U.S. dollar due to higher crude oil prices, foreign investor outflows, and a stronger greenback driven by rising U.S. Treasury yields.

- Brent crude oil prices rose after U.S. President rejected Iran's peace proposal, raising concerns over Middle East oil supply disruptions.

- Gold prices fell on higher oil prices and growing U.S. Fed rate hike expectations. Bullion has fallen over 20% since the US-Israeli war with Iran began in late February, pressured by expectations that conflict-driven inflation could keep interest rates higher for longer.

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