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# Weekly Market Update

## Aug 31, 2026 -Sep 04, 2026

AMFI Registered Mutual Fund Distributor

# DOMESTIC MARKETS

# EQUITY MARKET INDICES

| | BSE Sensex | Nifty 50 | BSE 150 Midcap | BSE 250 Smallcap |
|---|---|---|---|---|
| Sep 04, 2026 | 76515 | 23897 | 17097 | 7281 |
| Aug 28, 2026 | 77264 | 24175 | 17335 | 7279 |
| 1 Week change (%) | -0.97 | -1.15 | -1.37 | 0.00 |
| 1 Month change (%) | -2.63 | -2.95 | -0.29 | 1.54 |
| YTD Change (%) | -10.18 | -8.60 | 4.07 | 9.21 |

# SECTORAL INDICES

| | BSE Bankex | BSE Healthcare | BSE IT | BSE Auto | BSE FMCG | BSE Metal |
|---|---|---|---|---|---|---|
| Sep 04, 2026 | 64904 | 50913 | 29401 | 61406 | 17469 | 42293 |
| Aug 28, 2026 | 64963 | 51594 | 29978 | 63737 | 17761 | 42969 |
| 1 Week change (%) | -0.09 | -1.32 | -1.92 | -3.66 | -1.64 | -1.57 |
| 1 Month change (%) | -0.66 | 0.25 | -2.48 | -4.89 | -5.29 | -0.30 |
| YTD Change (%) | -3.00 | 16.24 | -19.96 | -2.79 | -11.51 | 13.95 |

# MARKET FUNDAMENTALS

| Ratios | BSE Sensex | Nifty 50 | Nifty Midcap 150 | Nifty Smallcap 250 |
|---|---|---|---|---|
| P/E | 20.27 | 20.02 | 28.97 | 34.10 |
| P/B | 4.11 | 2.89 | 4.37 | 3.59 |
| Dividend yield | 1.10 | 1.19 | 0.58 | 0.55 |

# FII AND DII NET BUYING (CASH)

| | FII (in Crores) | DII (in Crores) |
|---|---|---|
| Sep 04, 2026 | -3111.94 | 8930.12 |
| MTD-Sep 2026 | 2373.94 | 18567.50 |
| YTD (2026) | -356680.72 | 582072.06 |

# KEY DEBT MARKET INDICATORS

| Debt indicators (%) | Sep 03, 2026 |
|---|---|
| Repo rate | 5.25% |
| Reverse repo rate | 3.35% |
| MSF rate | 5.50% |
| TREP | 4.45% |
| 10 Year Gilt | 6.96% |

| Debt indicators (%) | Sep 03, 2026 |
|---|---|
| 3 Month CD rate | 5.86% |
| 1 year CD rate | 7.02% |
| 3 Month CP rate | 5.90% |
| 5 Year Corp bond | 7.48% |

# KEY MACRO INDICATORS

| Key Macro indicators | |
|---|---|
| | |
| CPI | 4.45% (Jul-2026) |
| | |
| WPI | 9.78% (Jul-2026) |
| | |
| GDP growth rate | 7.80% ( Jun 2026) |
| | |
| IIP | 6.70% (Jul-2026) |

# GLOBAL MARKETS

# GLOBAL EQUITY INDICES

| | Dow Jones (USA) | FTSE 100 (UK) | Nikkei (Japan) | Hang seng (HK) |
|---|---|---|---|---|
| Sep 04, 2026 | 53414 | 10831 | 65020 | 25650 |
| Aug 28, 2026 | 53559 | 10824 | 66405 | 25584 |
| 1 Week change (%) | -0.27 | 0.06 | -2.09 | 0.26 |
| 1 Month change (%) | -1.72 | -0.53 | -1.01 | 0.47 |
| YTD Change (%) | 10.40 | 8.84 | 25.44 | -2.61 |

# COMMODITIES

| Commodities | Brent Crude ($/BBL) | Gold (INR/10 GM) | Silver (INR/1 KG) |
|---|---|---|---|
| Sep 04, 2026 | 95.85 | 154425 | 235557 |
| Aug 28, 2026 | 88.28 | 158854 | 243862 |
| 1 Week Change (%) | 8.57 | -2.79 | -3.41 |
| 1 Month Change (%) | 21.32 | 8.64 | 7.83 |
| YTD Change (%) | 35.59 | 16.42 | 2.66 |

# MOVEMENT OF RUPEE VS OTHER CURRENCIES

| | US Dollar | British Pound | EURO | 100 Yen |
|---|---|---|---|---|
| Sep 04, 2026 | 94.51 | 127.74 | 109.78 | 60.49 |
| Aug 28, 2026 | 95.49 | 129.28 | 110.37 | 59.67 |
| 1 Week Change (%) | -1.03 | -1.19 | -0.53 | 1.37 |
| 1 Month Change (%) | -0.87 | -0.21 | 0.06 | -0.03 |
| YTD Change (%) | 5.17 | 5.60 | 4.09 | 5.42 |

# NEWS SUMMARY

# NEWS SUMMARY

- Indian equity markets ended the week on a cautious note, extending their corrective trend as elevated crude oil prices, renewed geopolitical tensions and uncertainty over the global interest-rate outlook continued to dampen investor sentiment. For the week, the Nifty 50 declined around 1.15% to close at 23,897, while the Sensex fell nearly 1% to settle at 76,515. The broader market remained relatively resilient, with small-cap indices posting flat, while the mid-cap index ended lower. On the BSE sectoral front, Most declined. BSE Auto was the major loser, down 3.66%, followed by IT, down 1.92% and FMCG, down 1.64%.

- Looking ahead, Indian markets are likely to remain sensitive to global cues next week, with developments in the West Asia conflict, crude oil prices and upcoming US inflation data expected to shape investor sentiment, according to analysts. Markets will also track foreign investor flows, movements in the rupee, global equities and domestic liquidity as investors assess the potential impact of geopolitical tensions and shifting expectations for US interest rates.

- Government data showed that Gross Domestic Product (GDP) of the Indian economy at constant (2022-23) prices witnessed a growth of 7.8% YoY in Q1 of FY 2026-27, against the growth of 6.9% YoY experienced during Q1 of FY 2025-26. On the sectoral front, the Manufacturing sector witnessed growth of 9.2% YoY in Q1 of FY 2026-27 as against growth of 8.3% YoY in Q1 of FY 2025-26. The growth of Agriculture, Livestock, Forestry & Fishing slowed to 3.6% YoY in Q1 of FY27 compared to 4.4% YoY rise in Q1 of FY26.

- Total gross Goods and Services Tax (GST) revenue grew 14.8% YoY to Rs. 2 lakh crore in Aug 2026 from Rs. 1.74 lakh crore in Aug 2025.

# NEWS SUMMARY

- India's current account deficit (CAD) widened to $4.2 billion, or 0.5% of GDP, in the April-June quarter, compared with $3.4 billion, or 0.4% of GDP, a year earlier. The merchandise trade deficit also expanded to $86.1 billion from $68.9 billion over the same period. A sustained rise in oil prices could therefore widen the CAD further and keep demand for dollars from oil importers elevated

- India's Services Purchasing Managers' Index (PMI) rose to 54.1 in Aug 2026 from 53.3 in Jul 2026, supported by stronger output and employment growth. Meanwhile, the Composite PMI remained unchanged at 54.3 in Aug 2026 compared with the previous month.

- Banks mobilised $127.22 billion through FCNR(B) deposits by Aug 31, 2026, driving total dollar inflows under the RBI's special schemes to $136.38 billion and supporting a record rise in India's forex reserves.

- The Index of Industrial Production (IIP) grew 6.7% YoY in Jul 2026, moderating from the upwardly revised 8.8% YoY growth in Jun 2026. Manufacturing output expanded 7.3% YoY, slower than the revised 9.5% growth recorded in Jun 2026, while the mining and quarrying sector contracted 0.9% YoY. According to the RBI data, India's current account deficit widened on a YoY basis to US$ 4.2 billion (0.5% of GDP) in Q1FY27, from US$ 3.4 billion (0.4% of GDP) in Q1FY26.

- The Manufacturing Purchasing Managers' Index (PMI) fell to a five-year low of 52.8 in Aug 2026 from 53.5 in Jul 2026, as weak demand slowed sales, output, and hiring.

- Bond yields rose, tracking higher U.S. Treasury yields and a sharp increase in crude oil prices, which reignited inflation concerns. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 2 bps to close at 6.96% as compared to the previous week's close of 6.91%.

# NEWS SUMMARY

- The US market indices declined with the outlook hinging on US monetary-policy expectations, elevated crude oil prices and the evolving geopolitical situation in West Asia.
- Asian equity markets mostly declined as investors became increasingly worried about rising inflation and the possibility of further interest rate hikes. Higher crude oil prices, rising global bond yields, and escalating geopolitical tensions further added to losses.
- European shares ended the week lower and was fuelled by escalating conflict in the middle east, which sent crude prices higher and added to investor concerns over sticky inflation, rising government debt, and prolonged central bank tightening.
- U.S. trade deficit surged to $88.6 billion in Jul 2026 from a revised $71.2 billion in Jun 2026, according to the Commerce Department.
- Eurozone inflation rose 3.3% in Aug 2026 from 2.9% in Jul 2026, according to Eurostat.
- Brent crude rose more than 8% for the week, while West Texas Intermediate gained over 9%, as renewed US-Iran hostilities and concerns over the vital shipping route lifted the geopolitical risk premium in oil markets.
- Gold prices declined amid growing expectations of rate hike by the U.S. Federal Reserve.
- The Indian rupee rose against the U.S. dollar as record NRI deposit inflows enhanced RBI's foreign exchange firepower and improved confidence in India's external position.

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