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Weekly Market Update

May 04, 2026 -May 08, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
May 08, 2026	77328	24176	16637	6949
Apr 30, 2026	76913	23997	16087	6661
1 Week change (%)	0.54	0.75	3.42	4.32
1 Month change (%)	0.91	1.69	8.41	13.06
YTD Change (%)	-9.23	-7.54	1.27	4.24

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
May 08, 2026	62353	46534	28584	59963	18997	42743
Apr 30, 2026	61706	44614	28406	57170	18890	42195
1 Week change (%)	1.05	4.30	0.63	4.88	0.57	1.30
1 Month change (%)	1.04	9.73	-6.03	4.93	7.92	5.91
YTD Change (%)	-6.81	6.40	-22.63	-5.04	-3.77	15.16

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	20.93	21.00	33.86	31.24
P/B	4.15	3.31	4.87	3.68
Dividend yield	1.19	1.29	0.69	0.68

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
May 08, 2026	-4110.60	6748.13
MTD-May 2026	-11072.35	21392.85
YTD (2026)	-251824.22	323060.94

KEY DEBT MARKET INDICATORS

Debt indicators (%)	May 07, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.08%
10 Year Gilt	6.93%

Debt indicators (%)	May 07, 2026
3 Month CD rate	6.60%
1 year CD rate	7.19%
3 Month CP rate	6.64%
5 Year Corp bond	7.36%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	3.40% (Mar-2026)
WPI	2.13% (Feb-2026)
GDP growth rate	7.80% (Oct-Dec 2025)
IIP	4.10% (Mar-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
May 08, 2026	49609	10233	62713	26393
May 01, 2026	49499	10363	59513	25776
1 Week change (%)	0.22	-1.25	5.38	2.39
1 Month change (%)	2.95	-3.49	12.20	2.49
YTD Change (%)	2.54	2.83	20.99	0.21

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
May 08, 2026	100.49	150519	255478
Apr 30, 2026	113.94	149777	239833
1 Week Change (%)	-11.80	0.46	6.52
1 Month Change (%)	4.76	0.04	5.14
YTD Change (%)	66.82	13.48	11.34

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
May 08, 2026	94.53	128.84	111.41	60.33
May 01, 2026	94.88	128.93	111.26	60.54
1 Week Change (%)	-0.37	-0.07	0.13	-0.35
1 Month Change (%)	2.44	3.76	3.02	3.78
YTD Change (%)	5.20	6.51	5.63	5.14

NEWS SUMMARY

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- Indian equity markets ended the last week on positive note driven by robust buying amid improving global sentiment and optimism around a potential U.S.-Iran peace deal. Investors continued to focus on opportunities arising from favourable corporate earnings. The NSE Nifty 50 rose 0.75% and the BSE Sensex rose 0.54%. Broader markets outperformed, with BSE 150 Midcap rising 3.42% and BSE 250 Smallcap gaining 4.32%. On the BSE sectoral front, Most were positive. BSE Auto was the major gainer, up 4.88% followed by healthcare, up 4.30% and Metal, up 1.30%.

- Looking ahead, markets are expected to be remain volatile and largely driven by geopolitical headlines, with investor attention firmly focused on developments surrounding the ongoing US–Iran situation. Besides that, broader global cues, rupee movement, FII flow trends and Q4FY26 results will also play a pivotal role in shaping market direction.

- India's Services Purchasing Managers' Index (PMI) hit 5-month high to 58.8 in Apr 2026, compared to 57.5 in Mar 2026, helped by stronger domestic demand, higher ecommerce activity, and improved new order inflows. The composite PMI increased to 58.2 in Apr 2026 from 57.0 in Mar 2026.

- The total gross Goods and Services Tax (GST) revenue hit an all-time high, growing by 8.7% YoY to Rs. 2.43 lakh crore in Apr 2026, compared with Rs. 2.23 lakh crore in Apr 2025.

- The Manufacturing Purchasing Managers' Index (PMI) rose to 54.7 in Apr 2026 from 53.9 in Mar 2026. While output and new orders continued to expand, growth remained subdued compared with levels seen over the past three-and-a-half years.

NEWS SUMMARY

- India's coffee exports rose around 27% YoY to 1.74 lakh tonnes in Jan–Apr 2026, led by strong demand for robusta and instant coffee, while arabica shipments declined.

- The Ministry of Micro, Small and Medium Enterprises' Prime Minister's Employment Generation Programme created over 36 lakh jobs and helped set up more than 4 lakh micro-enterprises during FY22–26, with a strong rural focus.

- The RBI has repatriated about 77% of its 880.5 metric tonnes of gold to India by end-Mar 2026, speeding up onshoring amid declining global trust in overseas custody and raising gold's share in forex reserves to about 16.7%.

- Bond yields declined amid optimism that a potential U.S.–Iran peace deal could ease crude oil prices, improve risk sentiment, and reduce inflationary pressures. Yield on the 10-year benchmark paper (6.48% GS 2035) declined by 4 bps to close at 6.98% as compared to the previous week's close of 7.02%.

- The US market indices, The S&P 500 and the Nasdaq have surged to record highs last week as investors focused on strong financial reports from U.S. companies, setting aside concerns that high oil prices related to the Middle East conflict are fueling inflation. The S&P 500 and the Nasdaq notched their sixth straight weekly gains. The Dow has logged two consecutive weekly advances.

- European equity markets closed on a mixed note as investors turned cautious after the strong rally in the previous week. Uncertainty around the durability of Middle East peace efforts and tighter monetary policy signals from a regional central bank weighed on sentiment.

NEWS SUMMARY

- Asian equity markets mostly rose as investors expressed hopes for a peace deal between the United States and Iran. Risk sentiment also improved amid signs of de-escalation in the Middle East conflict.
- The European Central Bank left its interest rates unchanged on Apr 30, 2026, as expected. The Governing Council, led by the ECB President, kept its benchmark rates steady, with the deposit rate at 2.0%, the main refinancing rate at 2.15%, and the marginal lending rate at 2.40%.
- The Bank of England left its key interest rate unchanged on Apr 30, 2026, but warned of the risk of material second round effects from the energy price shock caused by the war in the Middle East, which could lead to future rate hikes. The BoE's Monetary Policy Committee voted 8–1 to hold the bank rate at 3.75%.
- The U.K. Services Purchasing Managers' Index rose to 52.7 in Apr 2026 from an 11-month low of 50.5 in Mar, according to survey data from S&P Global.
- China's services Purchasing Managers' Index rose to 52.6 in April 2026 from 52.1 in the previous month, according to survey results published by S&P Global.
- The Indian rupee strengthened against the U.S. dollar, supported by a decline in crude oil prices.
- Brent crude oil spot prices declined on optimism over a potential U.S.-Iran peace deal.
- Gold prices rose as investors assessed a fragile Middle East truce and its impact on inflation and interest-rate expectations.

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