Privet Wealth

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Weekly Market Update

Jul 06, 2026 -Jul 10, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Jul 10, 2026	77569	24206	17001	7153
Jul 03, 2026	77763	24270	16778	7120
1 Week change (%)	-0.25	-0.26	1.33	0.46
1 Month change (%)	2.70	2.47	6.37	7.19
YTD Change (%)	-8.94	-7.42	3.49	7.29

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Jul 10, 2026	65687	49941	27211	59409	18408	40816
Jul 03, 2026	65450	50088	26730	59766	18629	40547
1 Week change (%)	0.36	-0.29	1.80	-0.60	-1.19	0.66
1 Month change (%)	2.66	5.39	-1.24	2.58	1.48	-2.83
YTD Change (%)	-1.83	14.19	-25.92	-5.92	-6.75	9.97

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	21.04	20.87	29.67	36.31
P/B	4.17	3.15	4.85	3.81
Dividend yield	1.07	1.23	0.64	0.62

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Jul 10, 2026	2603.72	2019.68
MTD-Jul 2026	4572.89	11265.37
YTD (2026)	-341170.94	481402.53

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Jul 09, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.27%
10 Year Gilt	6.75%

Debt indicators (%)	Jul 09, 2026
3 Month CD rate	6.52%
1 year CD rate	7.26%
3 Month CP rate	6.67%
5 Year Corp bond	7.27%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	3.93% (May-2026)
WPI	9.68% (May-2026)
GDP growth rate	7.80% (Mar 2026)
IIP	5.10% (May-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Jul 10, 2026	52637	10497	68557	24175
Jul 03, 2026	52900	10679	69774	23350
1 Week change (%)	-0.50	-1.70	-1.74	3.53
1 Month change (%)	2.80	0.24	-1.10	-2.20
YTD Change (%)	8.79	5.49	32.27	-8.21

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Jul 10, 2026	76.01	142896	220540
Jul 03, 2026	72.12	145764	233669
1 Week Change (%)	5.39	-1.97	-5.62
1 Month Change (%)	-15.90	-2.59	-5.61
YTD Change (%)	7.52	7.73	-3.88

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Jul 10, 2026	95.52	127.95	109.00	58.90
Jul 03, 2026	95.39	127.37	109.14	59.12
1 Week Change (%)	0.14	0.45	-0.13	-0.37
1 Month Change (%)	-0.30	-0.12	-1.37	-1.39
YTD Change (%)	6.19	5.78	3.35	2.65

NEWS SUMMARY

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- The Indian stock market ended the week with marginal losses, breaking a four-week winning run as renewed geopolitical tensions in West Asia and a sharp rise in crude oil prices weighed on investor sentiment. The NSE Nifty 50 and the BSE Sensex lost 0.26% and 0.25% respectively during the week. Broader markets remained resilient and continued to outperform, BSE 150 Midcap and BSE 250 Smallcap rose 1.33% and 0.46% respectively. On the BSE sectoral front, it was mixed. BSE IT was the major gainer, up 1.80% followed by Metal, up 0.66% and Bankex, up 0.36%. FMCG was the major loser, down 1.19% followed by Auto, down 0.60% and Healthcare, down 0.29%.

- Looking ahead, Investor attention in the week ahead is expected to remain firmly focused on the ongoing negotiations between the United States and Iran, as markets closely monitor developments following the recent escalation in geopolitical tensions. Apart from geopolitical developments, markets will closely watch inflation data from India, the European Union and the United States for fresh clues on the monetary policy trajectory of major global central banks. investor focus will also increasingly shift to the first-quarter earnings season, with the technology sector expected to remain in the spotlight.

- India and Russia are targeting $50 billion in mutual investments by 2030, focusing on joint ventures in advanced manufacturing, critical minerals, and green technologies. During a recent meeting in Moscow, both nations agreed to encourage private-sector collaboration and investment exploration. India highlighted its cost-effective skilled workforce and investment-friendly reforms, while the "Making in Russia for India" model was also promoted to strengthen bilateral industrial cooperation.

NEWS SUMMARY

- The Employees' Provident Fund Organisation will credit Rs. 1.44 lakh crore as 8.25% interest for FY26 to around 34 crore member accounts by Jul 15, 2026, through an automated process. The retirement fund body will also launch its new CITES 2.01 portal and has increased the auto-settlement limit for advance claims to Rs. 5 lakh from Rs. 1 lakh.

- Bond yields rose amid profit booking, while escalating Middle East tensions and higher U.S. Treasury yields weighed on investor sentiment. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 1 bps to close at 6.72% as compared to the previous week's close of 6.71%.

- According to GST data, e-way bill generation rose 14.5% YoY to 136.8 million in Jun 2026, reaching the fourth-highest monthly level and signalling resilient domestic trade activity and tax compliance.

- According to the Finance Ministry, over 140,000 guarantees worth more than Rs. 1.55 lakh crore have been issued under the Emergency Credit Line Guarantee Scheme (ECLGS) 5.0, with MSMEs accounting for 98% of beneficiaries.

- India's Services Purchasing Managers' Index (PMI) fell to 57.4 in Jun 2026 from 59.8 in May 2026, as domestic demand softened, client interest weakened across some service segments, and hiring activity remained broadly stagnant. Composite PMI also declined to 57.1 in Jun 2026 from 59.3 in the previous month.

- UIDAI has enabled Aadhaar holders to add or update their email IDs directly through the Aadhaar app, eliminating the need to visit an enrolment centre. The free service, available for six months, aims to improve convenience, transparency, and security.

NEWS SUMMARY

- The U.S. equity markets closed mixed as renewed U.S.-Iran tensions and rising oil prices heightened concerns over inflation and geopolitical risks. Investor sentiment remained cautious amid expectations that elevated energy costs could delay interest-rate reductions, while uncertainty surrounding the U.S. Federal Reserve's policy outlook restrained broader risk appetite.

- European shares ended a four-week winning streak, buffeted by an unwind in tech stocks and resurgent tensions in the Middle East that rattled oil markets. The pan-European STOXX 600 lost 1.8% during the week, as investors dialled back hopes that the energy supply shock would ease soon.

- Asian equity markets closed on a mixed note, giving up some of their early gains as investors digested China's Jun 2026 inflation data and monitored escalating hostilities in the Middle East.

- The U.S. trade deficit widened to $77.6 billion in May 2026, from a revised $54.6 billion in Apr 2026, according to the Commerce Department.

- The U.S. Services PMI edged down to 54.0 in Jun 2026 after rising to 54.5 in May 2026, according to the Institute for Supply Management.

- Japan's current account surplus stood at ¥3.968 trillion in May 2026, according to the Ministry of Finance.

- Gold witnessed another subdued week, declining more than 2 per cent, as a combination of a stronger US dollar, firm crude oil prices, and expectations of higher interest rates continued to weigh on investor sentiment.

NEWS SUMMARY

- The Indian rupee declined against the U.S. dollar as the collapse of the U.S.- Iran ceasefire pushed oil prices higher.

- Brent crude oil prices rose after the U.S. President said the Iran ceasefire was "over," raising fears of renewed conflict and disruptions in the Strait of Hormuz.

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