Privet Wealth

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Weekly Market Update

Jan 12, 2026 -Jan 16, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE Midcap	BSE Smallcap
Jan 16, 2026	83570	25694	46186	49359
Jan 09, 2026	83576	25683	46304	49912
1 Week change (%)	0.00	0.04	-0.25	-1.11
1 Month change (%)	-1.17	-0.48	0.52	3.08
YTD Change (%)	-1.90	-1.73	-1.90	2.02

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Jan 16, 2026	67964	42857	37774	61313	19070	38262
Jan 09, 2026	66616	43677	36795	62289	19187	36608
1 Week change (%)	2.02	-1.88	2.66	-1.57	-0.61	4.52
1 Month change (%)	3.02	-1.56	2.48	0.33	-4.82	10.08
YTD Change (%)	1.58	-2.01	2.24	-2.91	-3.40	3.09

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	23.08	22.40	32.95	28.57
P/B	4.48	3.49	4.44	3.46
Dividend yield	1.17	1.37	0.80	0.72

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Jan 16, 2026	-4346.13	3935.31
MTD-Jan 2026	-26052.40	34076.71
YTD (Jan 2026 Onwards)	-26052.40	34076.71

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Jan 14, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.29%
10 Year Gilt	6.65%

Debt indicators (%)	Jan 14, 2026
3 Month CD rate	6.67%
1 year CD rate	6.96%
3 Month CP rate	6.77%
5 Year Corp bond	7.17%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	1.33% (Dec-2025)
WPI	0.83% (Dec-2025)
GDP growth rate	8.20% (Jul-Sep 2025)
IIP	6.70% (Nov-2025)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Jan 16, 2026	49359	10235	53936	26844
Jan 09, 2026	49504	10124	51939	26231
1 Week change (%)	-0.29	1.10	3.84	2.34
1 Month change (%)	3.08	4.72	8.93	5.40
YTD Change (%)	2.02	2.86	4.06	1.92

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Jan 16, 2026	62.61	141147	283480
Jan 09, 2026	61.97	136645	242189
1 Week Change (%)	1.03	3.29	17.05
1 Month Change (%)	5.60	6.99	41.83
YTD Change (%)	3.93	6.41	23.55

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Jan 16, 2026	90.70	121.37	105.23	57.32
Jan 09, 2026	90.28	121.04	105.04	57.18
1 Week Change (%)	0.47	0.27	0.18	0.24
1 Month Change (%)	0.30	0.34	-0.89	-1.31
YTD Change (%)	0.93	0.34	-0.23	-0.10

NEWS SUMMARY

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- The Indian stock market concluded a volatile week ending January 16, 2026, with benchmark indices ending largely flat but showing signs of resilience. While global uncertainties weighed on sentiment, a strong start to the Q3 FY26 earnings season, particularly from the IT and banking sectors, provided a much-needed lift. The broader market indices, BSE Midcap and BSE Smallcap lost 0.25% and 1.11%, respectively. On the BSE sectoral front, it was mixed. Metal was the major gainer, up 4.52% followed by Commodities, up 2.69% and IT, up 2.66%. Consumer durables were the major loser, down 2.44% followed by Reality, down 2.33% and Power, down 1.17%.

- Looking ahead, Analysts expect that markets expected to be driven by earnings outcomes, global trade signals and geopolitical developments in the coming week. Banking stocks are likely to remain in the spotlight as markets likely to react on quarterly results from heavyweights such as ICICI Bank and HDFC Bank, along with a host of private and public sector lenders. On the global front, uncertainty around U.S. trade negotiations remain a headwind for sentiment. However, attention is shifting to the India–EU trade agreement, which is expected to be concluded later this month and could act as a meaningful catalyst for improved investor confidence. On the global front, US macroeconomic data, including GDP growth, inflation trends, jobless claims, and PMI readings, will influence risk sentiment and currency movement.

- India's wholesale price index (WPI)-based inflation climbed to an eight month high of 0.83% YoY in Dec 2025, following a 0.32% drop in Nov 2025, primarily propelled by a reversal of contraction in food prices, as food inflation stabilised at 0% in Dec 2025, compared with a 2.6% decrease in Nov 2025.

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- India's Consumer Price Index (CPI)-based inflation rose to 1.33% YoY in Dec 2025, compared to a 0.71% increase in Nov 2025, driven by higher costs in personal care, vegetables, meat, fish, eggs, spices, and pulses. Despite this uptick, inflation remained below the RBI's 4% target for the eleventh consecutive month. Food prices saw a smaller decline, with vegetable deflation easing.

- India is nearing a trade agreement with the European Union, and talks are also underway for a trade deal with the United States. These developments signal significant progress in India's international trade relations. The India EU agreement is expected to be finalized soon. The European Union remains India's largest trading partner in goods, indicating a strengthening economic partnership.

- Bond yields climbed after Bloomberg Index Services postponed the inclusion of Indian bonds in its flagship Global Aggregate Index, disappointing market participants who had largely anticipated the inclusion as a certainty. Yield on the 10-year benchmark paper (6.48% GS 2035) rose by 4 bps to close at 6.68% as compared to the previous week's close of 6.64%.

- According to the official data, CPSEs and key government agencies spent Rs. 5.77 lakh crore by Dec 2025, which is about 74.5% of the Rs. 7.84 lakh crore annual target. The Railway Board and NHAI led the spending, while major energy firms like NTPC and Hindustan Petroleum exceeded their targets.

- The RBI has officially recognised the Foreign Exchange Dealers' Association of India (FEDAI) as a self regulatory organisation for all authorised dealers under its Omnibus SRO framework. FEDAI, which had applied for recognition in Mar 2024, now has one year to align its governance and operations with the framework and expand membership to all categories of authorised dealers.

NEWS SUMMARY

- According to the official data, India's net direct tax collection increased 8.82% YoY to Rs. 18.38 lakh crore in this financial year till Jan 11, 2026.

- European equity markets mostly rose as easing geopolitical and Federal Reserve independence concerns, alongside some positive economic data and upbeat earnings updates from TSMC, helped underpin sentiment. The STOXX 600 logged its fifth-consecutive weekly gain, its longest winning streak since May 2025. London's benchmark stock index notched up a weekly gain thanks to strong earnings for financials, upbeat data, and strength in resource-linked shares.

- U.S. equity markets declined amid uncertainty about the near-term outlook, driven by rising geopolitical tensions worldwide and a flurry of proposals from the U.S. President. Recently, the President called for a one-year cap on credit card rates at 10%, proposed banning defence companies from issuing dividends or conducting stock buybacks, and suggested prohibiting large institutional investors from purchasing single-family homes. For the week, the S&P 500 was down 0.38%, the Nasdaq declined 0.66% and the Dow fell 0.29%.

- U.S. Consumer Price Index (CPI) climbed 0.3% in Dec 2025, according to the Labor Department. Excluding food and energy, core CPI rose 0.2%, slightly below economists' expectations of 0.3%. The annual rate of consumer price growth remained unchanged at 2.7% in Dec, matching Nov's figure.

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- Japan’s leading index, which measures future economic activity, rose to 110.5 in Nov 2025, up from 109.8 in Oct, according to the Cabinet Office.
- Gold has extended its 2025 rally into the start of this year, driven partly by renewed attacks on the Fed's independence by the White House as well as expectations of monetary easing.
- The Indian rupee depreciated against the U.S. dollar amid a strengthening American currency, rising crude oil prices, and persistent outflows of foreign funds.
- Brent crude oil prices (spot) increased amid near-term supply concerns stemming from ongoing geopolitical tensions.

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