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Weekly Market Update

Feb 16, 2026 -Feb 20, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Feb 20, 2026	82814	25571	16085	6333
Feb 13, 2026	82626	25471	16030	6350
1 Week change (%)	0.23	0.39	0.34	-0.27
1 Month change (%)	1.10	1.64	2.36	2.26
YTD Change (%)	-2.79	-2.20	-2.09	-5.01

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Feb 20, 2026	68798	43085	31051	61766	18998	39552
Feb 13, 2026	67475	42636	31591	62588	18734	39125
1 Week change (%)	1.96	1.05	-1.71	-1.31	1.41	1.09
1 Month change (%)	3.81	4.17	-15.68	3.40	1.55	4.88
YTD Change (%)	2.82	-1.49	-15.47	-2.19	-3.77	6.57

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	22.74	22.38	32.64	26.25
P/B	4.44	3.48	4.43	3.41
Dividend yield	1.10	1.22	0.83	0.76

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Feb 20, 2026	-934.61	2637.15
MTD-Feb 2026	-2011.24	14111.18
YTD (Jan 2026 Onwards)	-43446.46	83331.92

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Feb 19, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	4.89%
10 Year Gilt	6.68%

Debt indicators (%)	Feb 19, 2026
3 Month CD rate	7.06%
1 year CD rate	6.96%
3 Month CP rate	7.07%
5 Year Corp bond	7.09%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	2.75% (Jan-2026)
WPI	1.81% (Jan-2025)
GDP growth rate	8.20% (Jul-Sep 2025)
IIP	7.80% (Dec-2025)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Feb 20, 2026	49625	10686	56825	26413
Feb 13, 2026	49500	10446	56941	26567
1 Week change (%)	0.25	2.30	-0.20	-0.58
1 Month change (%)	1.12	5.41	7.68	-0.65
YTD Change (%)	2.57	7.39	9.63	0.28

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Feb 20, 2026	70.52	154463	250110
Feb 13, 2026	66.49	152730	246032
1 Week Change (%)	6.06	1.13	1.66
1 Month Change (%)	10.39	5.73	-18.74
YTD Change (%)	17.07	16.45	9.00

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Feb 20, 2026	90.81	122.41	107.00	58.56
Feb 13, 2026	90.54	123.53	107.49	59.19
1 Week Change (%)	0.30	-0.91	-0.45	-1.06
1 Month Change (%)	-0.12	0.34	1.16	1.90
YTD Change (%)	1.06	1.20	1.45	2.06

NEWS SUMMARY

NEWS SUMMARY

- Indian equity markets largely traded rangebound and closed the week with modest gains driven by gains in financial and energy stocks amid optimism over trade deal progresses and India's participation in Pax Silica. This outweighed continued losses in information technology. Key benchmark indices BSE SENSEX and Nifty 50 gained 0.23% and 0.39% respectively. The broader market indices, BSE 100 Midcap gained 0.34% and BSE 250 Smallcap lost 0.27% respectively. On BSE sectoral front, it was mixed. Bankex was the major gainer, up 1.96%, followed by FMCG and Metal, up 1.41% and 1.09%, respectively. While the BSE IT index was a major laggard, down 1.71%.

- Looking ahead, Indian equity markets could be dominated by global tariff developments following the US Supreme Court's Feb. 20 ruling striking down key Trump tariffs. Investors will track FII/DII flows, RBI banking data, corporate actions, and Wall Street economic releases amid Trump's announced 10-15% global replacement tariffs.

- Inflation measured by the wholesale price index (WPI) rose to 1.81% in January, after remaining muted in the last six months, primarily due to an increase in prices of basic metals and other manufactured food and non-food articles and textiles, official data released by the commerce ministry showed on Monday.

- A majority of members of India's interest-rate setting panel view current policy rates as suitable for the economy, according to minutes from the February meeting released on Friday, though two members indicated potential for future rate cuts.

NEWS SUMMARY

- Composite PMI rises to 59.3 in February as factory output and new orders accelerate; services exports surge even as domestic momentum cools. India's combined manufacturing and services output expanded at the fastest pace in three months in February, driven by stronger factory production and resilient demand, S&P Global said on Friday, The seasonally adjusted composite output index rose to 59.3 in February from 58.4 in January, signalling the strongest rate of expansion since November.

- India's merchandise trade deficit widened annually to $34.68 billion in Jan 2026, compared to $23.43 billion in Jan 2025. Exports rose marginally by 0.61% YoY to $36.56 billion in Jan 2026, and imports increased 19.19% YoY to $71.24 billion during the same period.

- Indian bonds declined the most in two weeks as a rise in crude prices fanned inflation concerns in the fuel-importing nation. The benchmark 10-year yield rose as much as four basis points, the most since Feb. 6, to 6.72%, after escalating tensions between the US and Iran pushed oil prices to a six-month high.

- India and New Zealand have signed a Free Trade Agreement, which New Zealand's Science and Technology Minister Shane Reti described as a significant milestone. He also praised India's growing global leadership in artificial intelligence. Both nations aim to collaborate on AI policy and responsible governance. This partnership is expected to deepen bilateral ties and foster innovation with appropriate safeguards.

- Asian equity markets closed on a mixed note, with China, South Korea, and Taiwan shut for the Lunar New Year holidays. A cautious undertone prevailed as AI-related concerns continued to rattle markets, and data showed that Japan's economy grew at a much slower pace than expected in the fourth quarter of 2025.

NEWS SUMMARY

- European equity markets ended broadly higher, with sentiment remaining positive throughout the session amid hopes of monetary easing by several central banks, including the Bank of England. Investors also continued to track geopolitical developments. Britain's stock indexes ended the week higher, after the U.S. Supreme Court struck down President Donald Trump's tariffs.

- U.S. stocks ended higher led by gains in Wall Street heavyweights after the Supreme Court struck down President Donald Trump's global tariffs. For the week, the S&P 500 rose 1.08%, the Nasdaq gained 1.51% and the Dow edged up 0.25%.

- US GDP increased at a 1.4% annualized rate in the fourth quarter, the Commerce Department's Bureau of Economic Analysis said in its advance estimate.

- US, the personal consumption expenditures price index, excluding the volatile food and energy components, rose 0.4% after an unrevised 0.2% gain in November, the Commerce Department's Bureau of Economic Analysis said on Friday.

- Gold prices increased after the release of the inflation report from the Labor Department and the Supreme Court struck down President Donald Trump's global tariffs.

- The Indian rupee fell against the U.S. dollar due to as likely portfolio outflows and lingering geopolitical tensions weighed on the currency.

- Brent crude oil prices (spot) rose on reports that OPEC+ is leaning toward resuming production increases.

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