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Weekly Market Update

May 18, 2026 -May 22, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
May 22, 2026	75415	23719	16374	6682
May 15, 2026	75237	23643	16197	6685
1 Week change (%)	0.24	0.32	1.09	-0.04
1 Month change (%)	-1.63	-0.75	0.75	0.62
YTD Change (%)	-11.47	-9.28	-0.33	0.23

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
May 22, 2026	60904	47267	28065	57290	18550	43350
May 15, 2026	60489	47193	26964	57424	18825	43385
1 Week change (%)	0.69	0.16	4.08	-0.23	-1.46	-0.08
1 Month change (%)	-3.61	8.68	1.51	1.07	-1.13	3.39
YTD Change (%)	-8.98	7.91	-24.04	-9.28	-6.03	16.80

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	20.35	20.44	28.92	30.03
P/B	4.04	3.25	4.81	3.56
Dividend yield	1.28	1.36	0.67	0.71

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
May 22, 2026	-4440.47	6003.53
MTD-May 2026	-32228.65	56865.48
YTD (2026)	-272980.52	358533.57

KEY DEBT MARKET INDICATORS

Debt indicators (%)	May 21, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.20%
10 Year Gilt	7.11%

Debt indicators (%)	May 21, 2026
3 Month CD rate	7.53%
1 year CD rate	7.84%
3 Month CP rate	7.40%
5 Year Corp bond	7.65%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	3.48% (Apr-2026)
WPI	8.30% (Apr-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 22, 2026	50579	10466	63339	25606
May 15, 2026	49526	10195	61409	25962
1 Week change (%)	2.13	2.66	3.14	-1.37
1 Month change (%)	2.74	0.84	4.63	-1.43
YTD Change (%)	4.54	5.18	22.20	-2.78

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
May 22, 2026	103.94	157549	266292
May 15, 2026	109.24	157752	268147
1 Week Change (%)	-4.85	-0.13	-0.69
1 Month Change (%)	1.99	4.00	7.21
YTD Change (%)	70.84	18.78	16.05

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
May 22, 2026	95.64	128.46	110.97	60.07
May 15, 2026	96.01	127.92	111.60	60.45
1 Week Change (%)	-0.39	0.42	-0.56	-0.55
1 Month Change (%)	2.17	1.58	0.94	2.28
YTD Change (%)	6.43	6.20	5.21	5.73

NEWS SUMMARY

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- The Indian equity markets posted weekly gains led by IT and financial shares, as signs of progress in talks between the US and Iran to end the nearly three-month-long war supported the market sentiment. NSE Nifty 50 rose 0.32% while the BSE Sensex gained 0.24%. Broader market indices, BSE 150 Midcap rose 1.09% while BSE 250 Smallcap ended flat. On the BSE sectoral front, it was mixed. Information technology was the major gainer, up 4.08% followed by bankex, up 0.69% and health care, up 0.16%. Fast Moving Consumer Goods was the major loser, down 1.46% followed by auto, down 0.23%.

- Looking ahead, according to the analysts, Developments related to negotiations between the US and Iran to resolve the West Asia conflict, oil prices and foreign investors' trading activity will largely influence stock markets in a holiday-shortened coming week. Equity markets would remain closed on Thursday for Bakri Id. The rupee-dollar trend and global market sentiment would also be tracked by investors.

- The Reserve Bank on Friday announced a record dividend of Rs 2.87 lakh crore to the government for the year ended March 2026, providing a financial boost for the exchequer amid rising import bills and supply chain disruptions due to the West Asia conflict.

- Bond yields rose after a media report indicating that the RBI is considering interest rate hikes to support the rupee, boosting expectations of policy tightening. Yield on the 10-year benchmark paper (6.48% GS 2035) rose by 1 bps to close at 7.09% as compared to the previous week's close of 7.08%.

NEWS SUMMARY

- According to the Ministry of Commerce & Industry, the combined Index of Eight Core Industries rose 1.7% YoY in Apr 2026, following a 1.2% rise in Mar 2026. Cement posted the strongest growth at 9.4%, followed by steel at 6.2%, while coal and fertilizer output declined by 8.7% and 8.6%, respectively.

- According to the report released by the United Nations Department of Economic and Social Affairs, India's GDP growth forecast for 2026 has been revised down to 6.4% from 6.6% earlier, reflecting global uncertainties and the impact of the West Asia crisis, which has raised inflation and weakened growth prospects. Despite this, India is expected to remain among the fastest-growing major economies, supported by domestic demand, public investment, and strong services exports, though higher energy import costs and tighter financial conditions may weigh on growth.

- India's fertiliser subsidy bill could rise by Rs. 70,000 crore to Rs. 2.41 lakh crore in FY2026–27, driven by higher import costs for urea and other fertilisers due to the West Asia crisis. Despite cost pressures, fertiliser availability for the 2026 kharif season remains comfortable, supported by diversified import sourcing.

- India's merchandise trade deficit widened to $28.38 billion in Apr 2026, compared with $27.10 billion in Apr 2025. Exports increased 13.79% YoY to $ 43.56 billion, while imports rose 10.03% YoY to $ 71.94 billion over the same period.

- Asian and European equity markets rose, as optimism around renewed U.S.-Iran dialogue supported sentiment. Gains were aided by strength in energy-related segments amid rising oil prices, while investors continued to monitor developments in global bond markets and ongoing geopolitical uncertainty.

NEWS SUMMARY

- The U.S. equity markets moved higher as falling bond yields and oil prices improved sentiment and supported a strong rebound.
- The People's Bank of China maintained its loan prime rates unchanged for the twelfth consecutive month, as widely expected, on May 20, 2026. The one-year loan prime rate was kept at 3.0%, while the five-year LPR, the benchmark for mortgage rates, remained at 3.50%.
- Japan’s gross domestic product expanded by a seasonally adjusted 0.5% QoQ in the first quarter of 2026, according to the Cabinet Office.
- Gold traded in a range-bound manner last week, posting marginal gains of around 0.40% on the MCX. Gold prices are likely to remain range-bound in the coming week as traders await more clarity on the evolving US-Iran negotiations.
- The Indian rupee strengthened against the U.S. dollar, supported by likely central bank intervention.
- Brent crude oil prices declined after the U.S. President said the war with Iran would end “very quickly.”

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