



Weekly Market Update

Oct 19, 2026 – Oct 23, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Oct 23, 2026	73123	22600	15143	6440
Oct 16, 2026	74729	23146	16009	6915
1 Week change (%)	-2.14	-2.36	-5.41	-6.87
1 Month change (%)	-0.62	-2.01	-10.75	-11.03
YTD Change (%)	-14.16	-13.56	-7.83	-3.40

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Oct 23, 2026	61086	46951	30265	54824	16121	36723
Oct 16, 2026	62769	48267	30396	57027	17010	38681
1 Week change (%)	-2.68	-2.73	-0.43	-3.86	-5.23	-5.06
1 Month change (%)	-4.43	-9.95	11.62	-7.21	-6.87	-11.23
YTD Change (%)	-8.50	7.19	-18.08	-13.18	-18.34	-1.06

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	19.07	19.05	26.42	31.20
P/B	3.94	2.78	3.61	3.15
Dividend yield	1.13	1.52	1.04	0.82

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Oct 23, 2026	887.65	3235.36
MTD-Oct 2026	-51466.38	59110.32
YTD (2026)	-454533.86	698645.17

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Oct 22, 2026
Repo rate	5.50%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.65%
10 Year Gilt	7.46%

Debt indicators (%)	Oct 22, 2026
3 Month CD rate	7.60%
1 year CD rate	8.04%
3 Month CP rate	7.80%
5 Year Corp bond	8.03%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	5.54% (Sep-2026)
WPI	11.39% (Sep-2026)
GDP growth rate	7.80% (Jun 2026)
IIP	8.00% (Aug-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Oct 23, 2026	52215	10690	62693	23093
Oct 16, 2026	52002	10881	65324	24186
1 Week change (%)	0.41	-1.76	-4.02	-4.52
1 Month change (%)	1.68	0.10	-5.53	-6.74
YTD Change (%)	7.92	7.43	20.95	-12.32

COMMODITIES

Commodities	Brent Crude (\$/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Oct 23, 2026	116.93	141031	194170
Oct 16, 2026	109.69	145894	210664
1 Week Change (%)	6.60	-3.33	-7.82
1 Month Change (%)	18.96	-6.86	-16.60
YTD Change (%)	65.41	6.33	-15.38

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Oct 23, 2026	94.94	126.96	106.35	60.53
Oct 16, 2026	94.97	126.58	106.73	60.10
1 Week Change (%)	0.03	0.30	-0.36	0.72
1 Month Change (%)	-0.77	-0.56	-2.90	-0.38
YTD Change (%)	5.65	4.96	0.83	5.49

NEWS SUMMARY

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- ◆ Indian equity markets declined by snapping its two-week winning streak as geopolitical tensions and volatility in Brent crude oil prices kept investors on edge. Key benchmark indices BSE Sensex and Nifty 50 lost 2.14% and 2.36%, respectively. The broader market indices, BSE 150 Midcap and BSE 250 Smallcap fell by 5.41% and 6.87% respectively. On the BSE sectoral front, Most declined. Fast Moving Consumer Goods was the major loser, down 5.23%, followed by Metals, down 5.06% and Auto, down 3.86%.
- ◆ Looking ahead, Investors are heading into a data and event-packed week, with a flurry of corporate earnings, the US Federal Reserve's policy decision, crude oil prices and developments in West Asia expected to drive market sentiment. The listing of Jio Platforms, foreign fund flows and key domestic economic data will also remain on traders' radar. Globally, all eyes will be on the US Federal Reserve's policy announcement on October 28. While the central bank is widely expected to leave rates unchanged, investors will focus on its commentary for signals on the future path of interest rates.
- ◆ According to the Ministry of Commerce & Industry, the Index of Core Industries (ICI) rose 7.9% YoY in Sep 2026, following an upwardly revised growth of 5.9% YoY in Aug 2026. Iron ore recorded the strongest growth at 18.4%, followed by electricity and coal, which grew 11.4% and 10.7%, respectively. In contrast, fertilizers, natural gas, and crude oil contracted by 11.7%, 4.6%, and 1.4%, respectively.
- ◆ According to the RBI's Oct 2026 MPC meeting minutes, policymakers flagged broadening inflationary pressures and indicated that rate cuts are unlikely in the near term, with future policy actions limited to either a rate hike or a pause.

NEWS SUMMARY

- ◆ HSBC's flash India Composite Purchasing Managers' Index (PMI), compiled by S&P Global, rose to 56.7 this month from September's final 55.9 and above a Reuters poll median forecast for 56.1. That suggests healthy growth as the 50-mark separates growth from contraction, but it remains below this year's average.
- ◆ The government will implement GST process reforms from Nov 1, 2026, including simplified registration for small e-commerce sellers, faster automated refunds, and streamlined documentation requirements. The reforms also introduce a Rs. 10,000 thresholds for issuing show-cause notices, aiming to reduce compliance burden and improve ease of doing business.
- ◆ India's merchandise trade deficit narrowed to USD 30.21 billion in Sep 2026 from USD 33.00 billion in Sep 2025. Merchandise exports rose 23.06% YoY to USD 44.40 billion, while imports increased 8.01% YoY to USD 74.61 billion during the same period.
- ◆ According to the Income Tax Department, the Centre's net direct tax collections rose 13.2% YoY to Rs. 13.38 lakh crore as of Oct 14, 2026, supported by robust corporate tax receipts and higher securities transaction tax (STT) collections.
- ◆ Bond yields rose amid elevated crude oil prices. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 9 bps to close at 7.47% as compared to the previous week's close of 7.38%.
- ◆ Prime Minister of India and Canadian Foreign Minister discussed concluding the Comprehensive Economic Partnership Agreement (CEPA) by the end of 2026 and strengthening bilateral cooperation across trade, investment, energy, technology, education and security.

NEWS SUMMARY

- ◆ Asian equity markets mostly declined amid renewed concerns over the financing and profitability of the artificial intelligence boom, while escalating tensions in West Asia kept investors on edge.
- ◆ European equity markets closed lower as higher oil prices, geopolitical tensions, and concerns over AI-related spending weakened investor sentiment and risk appetite. For the week, the pan-European STOXX 600 index is down about 1.4%.
- ◆ Britain's FTSE 100 snapped a two-week winning streak as oil prices at over five-month highs weighed on risk appetite, ahead of finance minister John Healey's first budget next week.
- ◆ The U.S. equity markets closed lower as technology-sector weakness and concerns over AI-related spending weighed on investor sentiment and risk appetite. For the week, the S&P 500 fell 0.5% and the Nasdaq dropped 0.7%. The blue-chip Dow rose 0.4%, its third straight weekly gain.
- ◆ UK consumer inflation accelerated to 3.5% YoY in Sep 2026 from 3.1% in Aug 2026, while core inflation rose to 2.8% from 2.6%, driven largely by higher motor fuel prices.
- ◆ U.K. Gross domestic product grew 0.1% MoM in Aug 2026 as against 0.4% MoM growth seen in Jul 2026, as per the Office for National Statistics.
- ◆ China's gross domestic product rose 4.5% YoY in the third quarter of 2026 as against 4.3% expansion seen in the prior quarter, according to the National Bureau of Statistics.

NEWS SUMMARY

- ◆ Brent crude oil prices rose amid renewed concerns over escalating supply risks in the Middle East.
- ◆ The Indian rupee was largely unchanged against the U.S. dollar, giving up early gains as weaker domestic equity market and importer-led dollar demand weighed on sentiment.
- ◆ Gold prices declined as rising oil prices fueled inflation concerns, while investors tracked Fed policy expectations and dollar strength. Internationally, gold fell around 4% during the week, marking its steepest weekly decline since June, and slipped below the psychologically significant \$4,000-per-ounce level for the first time since mid-July. Silver prices also weakened, and trading near \$54 per ounce.

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