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Weekly Market Update

Jun 22, 2026 -Jun 26, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Jun 25, 2026	77100	24056	16624	7035
Jun 19, 2026	76802	24013	16753	7047
1 Week change (%)	0.39	0.18	-0.77	-0.17
1 Month change (%)	3.11	2.16	0.72	4.00
YTD Change (%)	-9.49	-8.00	1.19	5.52

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Jun 25, 2026	65599	48562	26650	59666	18342	40065
Jun 19, 2026	65072	47844	26829	58670	18414	42051
1 Week change (%)	0.81	1.50	-0.67	1.70	-0.39	-4.72
1 Month change (%)	7.31	3.75	-5.26	2.90	0.43	-8.46
YTD Change (%)	-1.96	11.04	-27.45	-5.51	-7.09	7.95

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	20.93	20.75	29.11	35.05
P/B	4.14	3.17	4.77	3.69
Dividend yield	1.26	1.37	0.66	0.66

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Jun 25, 2026	383.76	5747.75
MTD-Jun 2026	-45121.78	76156.35
YTD (2026)	-341836.98	460493.37

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Jun 24, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.20%
10 Year Gilt	6.78%

Debt indicators (%)	Jun 24, 2026
3 Month CD rate	6.65%
1 year CD rate	7.41%
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	4.90% (Apr-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Jun 26, 2026	51876	10508	69360	22671
Jun 19, 2026	51564	10363	71250	23924
1 Week change (%)	0.60	1.40	-2.65	-5.24
1 Month change (%)	2.38	0.79	7.22	-9.33
YTD Change (%)	7.22	5.60	33.82	-13.92

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Jun 26, 2026	72.60	139843	218680
Jun 19, 2026	80.57	144606	231829
1 Week Change (%)	-9.89	-3.29	-5.68
1 Month Change (%)	-23.00	-11.58	-19.25
YTD Change (%)	2.70	5.43	-4.69

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Jun 26, 2026	94.48	124.71	107.62	58.41
Jun 19, 2026	94.38	124.92	108.27	58.51
1 Week Change (%)	0.11	-0.17	-0.60	-0.17
1 Month Change (%)	-1.24	-3.02	-3.38	-2.96
YTD Change (%)	5.14	3.10	2.04	1.80

NEWS SUMMARY

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- Indian equity markets posted their third straight weekly gain, the longest such streak since the first week of December 2025, supported by easing geopolitical tensions and increasing optimism surrounding a potential U.S.–India bilateral trade agreement. The sharp decline in crude oil prices also proved to be a major positive trigger for domestic equities. The NSE Nifty 50 and the BSE Sensex gained 0.18 and 0.39% respectively during the week. Broader markets underperformed the benchmarks during the week. BSE 150 Midcap and BSE 250 Smallcap lost 0.77% and 0.17% respectively. On the BSE sectoral front, it was mixed. BSE Auto was the major gainer, up 1.70% followed by Healthcare, up 1.50% and Bankex, up 0.81%. BSE Metal was the major loser, down 4.72%.

- Looking ahead, Investor attention in the week ahead is likely to remain firmly focused on developments surrounding latest US-Iran escalation. In addition, Global markets are set for a more data driven as investors track key economic indicators, central bank commentary and corporate earnings for cues on growth, inflation and interest rates. In India, industrial production, fiscal deficit, PMI data and forex reserves will be in focus, while global investors will closely monitor US labour market data and manufacturing activity for signals on the Federal Reserve's policy path.

- India’s net direct tax collections grew 14.6% YoY to Rs. 5.21 lakh crore till Jun 17 of FY27, driven by strong corporate and non-corporate tax growth, while gross collections rose 12.5% to Rs.6.10 lakh crore; advance tax increased 15.3% to Rs.1.78 lakh crore, indicating healthy income trends, alongside a sharp rise in STT collections and only a marginal increase in refunds.

NEWS SUMMARY

- India and the U.S. concluded ministerial-level talks on a proposed bilateral trade agreement, aiming to finalize an initial deal before the expiry of Washington's temporary tariffs on Jul 24, 2026. Discussions focused on reviewing progress and strengthening economic engagement, with both sides adopting a constructive and forward-looking approach to deepen ties.

- Bond yields declined after the RBI Governor said it was "premature" to discuss rate hikes and that the central bank would first assess the second-round impact of rising crude oil prices on broader inflation before deciding on rates. Yield on the 10-year benchmark paper (6.94% GS 2036) fell by 9 bps to close at 6.77% as compared to the previous week's close of 6.86%.

- According to the Ministry of Commerce & Industry, the combined Index of Eight Core Industries rose by 0.5% YoY in May 2026, following a 1.8% increase in Apr 2026. Electricity recorded the strongest growth at 8.7%, followed by cement at 8.4%, while output in coal and refinery products declined by 9.3% and 8.7%, respectively.

- World Bank approved a $1.5 bn loan to support India's structural reforms aimed at boosting private sector–led job creation, improving the business environment, easing trade and investment, and enhancing access to capital.

- India stands at the forefront of the Asian Development Bank's investment strategy, as the lender aims to deploy roughly USD 1 billion in direct private sector support this year. ADB Vice-President Bhargav Dasgupta highlighted the intention to build on last year's progress, particularly in the renewable energy and sustainable development sectors.

NEWS SUMMARY

- US stock markets ended a volatile week on a mixed note, with technology stocks under pressure amid concerns over artificial intelligence (AI) spending, rising infrastructure costs and changing expectations for US interest rates. For the week ended June 26, the Dow Jones Industrial Average outperformed its peers, gaining about 0.6% to close at a record high. The broader S&P 500, however, declined 2.0%, while the tech-heavy Nasdaq Composite tumbled 4.6%, reflecting sustained pressure on semiconductor and large-cap technology stocks.

- Asian equity markets mostly declined due to concerns over valuations in the technology sector and growing skepticism about spending on AI infrastructure. Fears of potential rate hikes by the Federal Reserve, which unsettled Wall Street, also weighed on sentiment in Asian markets.

- European equity markets closed mostly higher as improving sentiment around potential progress in U.S.-Iran negotiations and softer oil prices eased inflation concerns. Broad-based gains across regional economies reflected resilient risk appetite, although caution persisted amid lingering geopolitical uncertainties and mixed economic signals in the session. The benchmark STOXX 600 marked modest weekly gains.

- The Bank of England left its key interest rate unchanged on Jun 18, 2026, as inflation slowed unexpectedly and unemployment declined, while a U.S.–Iran peace deal eased inflation fears. The Monetary Policy Committee voted 7–2 to hold the bank rate at 3.75%, the lowest since Jun 2023.

- Hong Kong's Consumer Price Index (CPI) rose 2.0% YoY in May 2026, accelerating from Apr's stable increase of 1.7%, according to the Census and Statistics Department.

NEWS SUMMARY

- Singapore's Consumer Price Index (CPI) increased by 1.8% YoY in May 2026, unchanged from the previous two months, according to the Monetary Authority of Singapore and the Ministry of Trade and Industry

- China held its benchmark interest rates steady for the thirteenth consecutive month, as widely expected, on Jun 22, 2026. The People's Bank of China left its one-year loan prime rate unchanged at 3.0%. Similarly, the five-year LPR, the benchmark for mortgage rates, was kept at 3.50%.

- Crude prices continued to retreat as concerns over supply disruptions eased. Brent crude traded near $73 a barrel after falling 4.3% in the previous session, while US West Texas Intermediate crude slipped below $70 a barrel. Market participants pointed to higher crude availability from Middle Eastern and African producers, which increased supply in the physical market and eased shortage concerns.

- Gold prices declined as investors assessed conflicting signals on U.S.-Iran peace talks and increased bets on Federal Reserve rate hikes this year.

- The Indian rupee fell against the U.S. dollar, weighed down by a firm greenback and weak domestic markets.

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