Privet Wealth

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Weekly Market Update

Mar 23, 2026 -Mar 27, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Mar 27, 2026	73583	22819	14648	5795
Mar 20, 2026	74532	23114	14844	5864
1 Week change (%)	-1.27	-1.27	-1.32	-1.17
1 Month change (%)	-8.29	-8.23	-8.49	-7.97
YTD Change (%)	-13.62	-12.72	-10.84	-13.08

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Mar 27, 2026	58816	42428	28447	53871	17095	36836
Mar 20, 2026	60173	42306	28226	54717	17320	37708
1 Week change (%)	-2.26	0.29	0.78	-1.55	-1.30	-2.31
1 Month change (%)	-12.64	-3.39	-3.22	-11.47	-7.86	-9.00
YTD Change (%)	-12.10	-3.14	-23.00	-14.69	-13.41	-0.75

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	20.22	19.97	29.73	24.12
P/B	3.95	3.10	4.03	3.13
Dividend yield	1.24	1.37	0.88	0.79

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Mar 27, 2026	-4367.30	3566.15
MTD-Mar 2026	-111377.35	128065.65
YTD (2026)	-159453.35	235709.50

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Mar 26, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.22%
10 Year Gilt	6.88%

Debt indicators (%)	Mar 26, 2026
3 Month CD rate	7.74%
1 year CD rate	7.33%
3 Month CP rate	7.61%
5 Year Corp bond	7.46%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	3.21% (Feb-2026)
WPI	2.13% (Feb-2026)
GDP growth rate	7.80% (Oct-Dec 2025)
IIP	4.80% (Jan-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Mar 27, 2026	45166	9967	53373	24951
Mar 20, 2026	45577	9918	53372	25277
1 Week change (%)	-0.90	0.49	0.00	-1.29
1 Month change (%)	-7.64	-7.54	-8.07	-4.25
YTD Change (%)	-6.65	0.16	2.97	-5.26

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Mar 27, 2026	106.84	142344	221711
Mar 20, 2026	106.77	146640	230503
1 Week Change (%)	0.07	-2.93	-3.81
1 Month Change (%)	40.28	-10.24	-16.69
YTD Change (%)	77.36	7.32	-3.37

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Mar 27, 2026	94.89	125.88	109.23	59.19
Mar 20, 2026	93.84	125.21	108.63	58.94
1 Week Change (%)	1.12	0.54	0.55	0.42
1 Month Change (%)	4.26	2.52	1.69	1.37
YTD Change (%)	5.60	4.09	3.56	3.15

NEWS SUMMARY

NEWS SUMMARY

- The Indian stock market indices Sensex and Nifty 50 declined for a fifth straight week, as fraught Middle East ceasefire negotiations and elevated crude oil prices intensified foreign outflows and battered the rupee. For the week, both indices lost 1.27% with the broader market indices BSE 150 Midcap and BSE 250 Smallcap losing 1.32% and 1.17%, respectively. On the BSE sectoral front, most were declined. Metal was the major loser, down 2.31%, followed by Bankex and Auto, down 2.26% and 1.55%, respectively. BSE IT was the major gainer, up 0.78%.

- The week ahead is likely to remain volatile with the ongoing tensions in the Middle East conflict, which has rattled the global markets for the last few weeks. The upcoming week will also be in focus as the financial year 2026-27 kicks in from April 1, marking a new tax cycle, and the Income Tax Act will come into effect. Crude oil prices will be in focus amid the geopolitical risk premium. Notably, trading activity in the Indian stock market is expected to be limited due to a truncated week, with markets being shut on account of Mahavir Jayanti and Good Friday, while investors navigate a packed calendar of key economic data releases.

- The government reduced the special additional excise duty on petrol and diesel amid elevated global crude oil prices. The Department of Revenue under the Ministry of Finance cut the excise on petrol to Rs 3 from Rs 13 per litre and on diesel to nil from Rs 10 per litre, according to a gazette notification issued late Thursday. The move is expected to benefit state-run oil marketing companies as they are incurring losses on sales amid high crude rates while keeping pump prices steady.

- A government survey shows that private-sector capex on new assets is expected to drop 16.5% to Rs. 9.55 lakh crore in FY27, with about 78% of responding firms sharing their investment plans.

NEWS SUMMARY

- India's central government has decided to keep its 4% retail inflation target, with a tolerance band of 2%–6%, in place for another five years. This continues the inflation-targeting regime introduced in 2016, which mandates the Reserve Bank of India to maintain consumer price inflation within the band and was most recently reviewed in 2021.

- The RBI's March 2026 bulletin highlighted that global uncertainty has risen sharply due to Middle East tensions, causing volatility across commodities, currencies, and financial markets. Despite this, India continues to exhibit resilience driven by strong domestic consumption and stable financial system liquidity.

- The Income Tax Department announced that its e-filing portal will continue to support compliance requirements under both the old and the new Income Tax Acts. It added that all assessments, appeals, and related proceedings for previous years will keep operating under the old Act until they are fully resolved

- The government introduced the Corporate Laws (Amendment) Bill, 2026 in the Lok Sabha, proposing changes to the Companies Act and LLP Act and referring it to a Joint Parliamentary Committee for detailed review. The Bill aims to ease compliance, decriminalise minor offences, and streamline corporate governance norms.

- NITI Aayog has proposed a seven-point strategy, including Rs. 7,500 crore in incentives and structural reforms, to boost manufacturing and exports of sports goods, aiming to position India as a global hub through duty rationalisation, stronger testing infrastructure, specialised clusters, and branding initiatives, with significant export growth and job creation targeted by 2036.

NEWS SUMMARY

- Bond yields surged tracking rise in crude oil prices and U.S. Treasury yields. The 10-year benchmark paper saw its biggest single-week rise since Oct 2023. Yield on the 10-year benchmark paper (6.48% GS 2035) rose by 19 bps to close at 6.93% as compared to the week's close of 6.74%.

- Asian equities ended mostly lower as early optimism faded amid persistent uncertainty over Iran-U.S. talks. Risk sentiment weakened as Tehran ruled out direct negotiations, raising concerns over prolonged geopolitical tensions

- European benchmark indices logged a modest gain for the week, illustrating the conflicting signals from the Middle East that investors have had to grapple with. The pan-European STOXX 600 index gained 0.4% for the week. U.S. President Donald Trump has sparked hopes of a ceasefire in recent days, but Iranian officials have struck a more measured tone.

- The U.S. equity markets declined sharply as lingering uncertainty over U.S.–Iran relations, elevated oil prices, and inflation concern undermined sentiment. Expectations of tighter policy from the U.S. Federal Reserve added to pressure, pushing major indices to their weakest levels in several months as investors adopted a cautious near-term outlook.

- U.S. crude oil inventories jumped by 6.9 million barrels in the week ended Mar 20th, far exceeding expectations, as lower export volumes and steady production contributed to a larger-than-forecast supply build.

- Eurozone private-sector activity slowed sharply in Mar 2026, with the flash composite PMI falling to 50.5 from 51.9, marking its weakest expansion in ten months amid falling new orders and surging input costs.

NEWS SUMMARY

- The Bank of Japan maintained its interest rate around 0.75% and signalled possible policy tightening if economic activity and inflation evolve as expected.
- The European Central Bank kept its key interest rates unchanged for the sixth consecutive meeting, citing heightened uncertainty from the Middle East conflict, while lifting its inflation outlook for the eurozone due to concerns over soaring crude oil prices and signalling readiness to respond if necessary.
- Japan's industrial production increased 4.3% MoM in Jan 2026, accelerating sharply from the 0.6% rise recorded in Dec 2025, according to the Ministry of Economy, Trade and Industry.
- Gold prices declined sharply as global markets were shaken by rising concerns over the Iran conflict and escalating inflation.
- Global crude oil prices notched weekly gains, reflecting scepticism about prospects for a ceasefire in the month-old Iran war. Brent crude futures rose by $4.56, or 4.2%, to $112.57 a barrel. US West Texas Intermediate futures rose $5.16, or 5.5%, to settle at $99.64.
- The rupee declined to record low against dollar, as oil prices dampened economic and earnings outlook for the world's third-largest crude oil importer, sparking record monthly foreign outflows.

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