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# Weekly Market Update

## Aug 24, 2026 -Aug 28, 2026

AMFI Registered Mutual Fund Distributor

# DOMESTIC MARKETS

# EQUITY MARKET INDICES

| | BSE Sensex | Nifty 50 | BSE 150 Midcap | BSE 250 Smallcap |
|---|---|---|---|---|
| Aug 28, 2026 | 77264 | 24175 | 17335 | 7279 |
| Aug 21, 2026 | 77540 | 24252 | 17282 | 7242 |
| 1 Week change (%) | -0.36 | -0.32 | 0.31 | 0.51 |
| 1 Month change (%) | -0.85 | -0.58 | 2.74 | 4.23 |
| YTD Change (%) | -9.30 | -7.54 | 5.51 | 9.18 |

# SECTORAL INDICES

| | BSE Bankex | BSE Healthcare | BSE IT | BSE Auto | BSE FMCG | BSE Metal |
|---|---|---|---|---|---|---|
| Aug 28, 2026 | 64963 | 51594 | 29978 | 63737 | 17761 | 42969 |
| Aug 21, 2026 | 65368 | 50545 | 29334 | 64260 | 17980 | 41795 |
| 1 Week change (%) | -0.62 | 2.07 | 2.20 | -0.81 | -1.22 | 2.81 |
| 1 Month change (%) | 0.19 | 2.82 | 2.60 | 2.76 | -3.90 | 5.10 |
| YTD Change (%) | -2.91 | 17.79 | -18.39 | 0.93 | -10.03 | 15.77 |

# MARKET FUNDAMENTALS

| Ratios | BSE Sensex | Nifty 50 | Nifty Midcap 150 | Nifty Smallcap 250 |
|---|---|---|---|---|
| P/E | 20.47 | 20.44 | 29.97 | 34.06 |
| P/B | 4.15 | 2.93 | 4.44 | 3.62 |
| Dividend yield | 1.07 | 1.16 | 0.59 | 0.58 |

# FII AND DII NET BUYING (CASH)

| | FII (in Crores) | DII (in Crores) |
|---|---|---|
| | | |
| Aug 28, 2026 | -5039.80 | 5183.93 |
| | | |
| MTD-Aug 2026 | 454.04 | 53679.27 |
| | | |
| YTD (2026) | -351068.78 | 558915.68 |

# KEY DEBT MARKET INDICATORS

| Debt indicators (%) | Aug 27, 2026 |
|---|---|
| Repo rate | 5.25% |
| Reverse repo rate | 3.35% |
| MSF rate | 5.50% |
| TREP | 5.08% |
| 10 Year Gilt | 6.89% |

| Debt indicators (%) | Aug 27, 2026 |
|---|---|
| 3 Month CD rate | 6.40% |
| 1 year CD rate | 7.24% |
| 3 Month CP rate | 6.45% |
| 5 Year Corp bond | 7.37% |

# KEY MACRO INDICATORS

| Key Macro indicators | |
|---|---|
| | |
| CPI | 4.45% (Jul-2026) |
| | |
| WPI | 9.78% (Jul-2026) |
| | |
| GDP growth rate | 7.80% ( Mar 2026) |
| | |
| IIP | 7.30% (Jun-2026) |

# GLOBAL MARKETS

# GLOBAL EQUITY INDICES

| | Dow Jones (USA) | FTSE 100 (UK) | Nikkei (Japan) | Hang seng (HK) |
|---|---|---|---|---|
| Aug 28, 2026 | 53559 | 10824 | 66405 | 25584 |
| Aug 21, 2026 | 53277 | 10816 | 66016 | 26009 |
| 1 Week change (%) | 0.53 | 0.07 | 0.59 | -1.63 |
| 1 Month change (%) | 2.59 | -0.67 | 7.34 | -1.06 |
| YTD Change (%) | 10.70 | 8.77 | 28.11 | -2.86 |

# COMMODITIES

| Commodities | Brent Crude ($/BBL) | Gold (INR/10 GM) | Silver (INR/1 KG) |
|---|---|---|---|
| Aug 28, 2026 | 88.28 | 158854 | 243862 |
| Aug 21, 2026 | 93.93 | 159802 | 245458 |
| 1 Week Change (%) | -6.01 | -0.59 | -0.65 |
| 1 Month Change (%) | -2.91 | 12.17 | 12.10 |
| YTD Change (%) | 24.88 | 19.76 | 6.28 |

# MOVEMENT OF RUPEE VS OTHER CURRENCIES

| | US Dollar | British Pound | EURO | 100 Yen |
|---|---|---|---|---|
| Aug 28, 2026 | 95.49 | 129.28 | 110.37 | 59.67 |
| Aug 21, 2026 | 95.70 | 130.56 | 111.80 | 60.20 |
| 1 Week Change (%) | -0.22 | -0.98 | -1.28 | -0.88 |
| 1 Month Change (%) | -0.32 | 1.57 | 1.19 | 2.07 |
| YTD Change (%) | 6.27 | 6.88 | 4.65 | 3.99 |

# NEWS SUMMARY

# NEWS SUMMARY

- Indian equity markets slightly declined and extended their losses to a third straight week as investor sentiment remained cautious amid mixed global cues, while stronger than expected U.S. inflation data for Jul 2026 revived concerns that the U.S. Federal Reserve could raise interest rates again before year-end. For the week, the Nifty 50 slipped around 0.32%, while the Sensex declined nearly 0.36%. The broader market, however, showed greater resilience, with the BSE 150 Midcap and BSE 250 Smallcap indices advancing about 0.31% and 0.51%, respectively. On the BSE sectoral front, it was mixed. BSE Metal was the major gainer, up 2.81%, followed by IT, up 2.20%, and Healthcare, up 2.07% respectively. BSE FMCG was the major loser, down 1.22%, followed by Auto, down 0.81% and Bankex, down 0.62%.

- Looking ahead, the market sentiment in the coming week is likely to be driven largely by the upcoming gross-domestic-product data, movements in crude oil prices and the US non-farm payrolls report, according to analysts. Besides these key indicators, investors will also track other macroeconomic data, India's August manufacturing and services PMI readings, GST collections, movement in the rupee, monthly auto sales figures and foreign investor activity for cues on the market's direction.

- Bond yields rose amid concerns over upcoming debt supply and the possibility of further liquidity tightening by the RBI ahead of potential policy action, while stronger-than-expected U.S. PCE inflation data for Jul 2026, which rose 3.7% YoY, reinforced expectations of a Federal Reserve rate hike. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 6 bps to close at 6.91% as compared to the previous week’s close of 6.85%.

# NEWS SUMMARY

- Union Commerce Minister highlighted that simplifying approval procedures, accelerating regulatory clearances, and implementing more efficient KYC frameworks could help attract higher foreign direct investment inflows while enhancing the ease of doing business and strengthening investor confidence in India.

- Prime Minister of India reviewed six infrastructure projects worth over Rs. 30,000 crore across nine states under the PRAGATI platform, emphasizing timely execution, quality standards, and integrated project monitoring.

- The government is examining the possibility of easing GST input tax credit restrictions on construction of immovable assets for own use, a move that could lower project costs and boost business investments.

- The U.S. equity markets closed the week slightly higher as strong earnings-driven optimism in the AI and technology sectors improved investor sentiment, supporting broader risk appetite and outweighing concerns surrounding the economic outlook. For the week, the S&P 500 gained 0.49%, the Nasdaq rose 0.85%, and the Dow climbed 0.53%.

- European equity markets mostly declined as expectations of tighter U.S. Federal Reserve policy, following stronger U.S. inflation data, and ongoing geopolitical tensions weighed on investor sentiment despite resilience in technology-related stocks. The pan-European STOXX 600 index posted a modest weekly gain after two consecutive weekly declines.

# NEWS SUMMARY

- Asian equity markets mostly declined following weak industrial output data from China for Jul 2026. Also, stronger than expected U.S. inflation data for Jul 2026 revived concerns that the U.S. Federal Reserve could raise interest rates again before year-end.

- Federal Reserve Chairman Kevin Warsh on Friday voiced concerns over persistently high inflation, suggesting that interest rates may have to rise further if there is insufficient progress in bringing price pressures under control.

- U.S. personal consumption expenditures (PCE) price index rose 0.2% MoM in Jul 2026 after edging down 0.1% MoM in Jun 2026, according to the Commerce Department. The annual rate of growth by the PCE price index came in at 3.7% in Jul, unchanged from Jun.

- Germany's gross domestic product rose 0.3% QoQ revised up from 0.2% QoQ initially estimated, as per data from Destatis. This followed 0.4% QoQ rise in the first quarter.

- Singapore's consumer price index rose 2.2% YoY in Jul 2026 as against 1.9% rise in Jun 2026, as per the Monetary Authority of Singapore and the Ministry of Trade and Industry. Singapore's consumer price inflation rose for a second consecutive month in July, reaching its highest level in almost two years.

- Gold prices declined as U.S. inflation for Jul 2026 came as expected which reduced hopes of aggressive rate cuts by the U.S. Federal Reserve. The combination of dollar movement, labour-market data, Fed expectations and geopolitical headlines is likely to determine whether gold stabilises or decline in the coming week.

# NEWS SUMMARY

- The Indian rupee rose against the U.S. dollar following foreign currency inflow and intervention by the Reserve Bank of India.

- Brent crude oil prices declined as investors saw a reduced risk of a major supply disruption in the Middle East.

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