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Weekly Market Update

Oct 26, 2026 –Oct 30, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Oct 30, 2026	74459	23053	15521	6557
Oct 23, 2026	73123	22600	15143	6440
1 Week change (%)	1.83	2.00	2.50	1.82
1 Month change (%)	2.73	1.91	-3.93	-6.27
YTD Change (%)	-12.59	-11.83	-5.52	-1.66

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Oct 30, 2026	61415	50168	30666	55965	16410	37765
Oct 23, 2026	61086	46951	30265	54824	16121	36723
1 Week change (%)	0.54	6.85	1.32	2.08	1.79	2.84
1 Month change (%)	-0.50	0.24	14.77	-3.78	-2.93	-6.79
YTD Change (%)	-8.01	14.53	-16.52	-11.38	-16.88	1.75

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	19.31	19.30	26.27	31.28
P/B	4.02	2.83	3.69	3.23
Dividend yield	1.02	1.42	1.03	0.78

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Oct 30, 2026	3598.54	-817.51
MTD-Oct 2026	-45161.71	62220.11
YTD (2026)	-448229.19	701754.96

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Oct 29, 2026
Repo rate	5.50%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.50%
10 Year Gilt	7.39%

Debt indicators (%)	Oct 29, 2026
3 Month CD rate	7.57%
1 year CD rate	8.25%
3 Month CP rate	7.58%
5 Year Corp bond	8.08%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	5.54% (Sep-2026)
WPI	11.39% (Sep-2026)
GDP growth rate	7.80% (Jun 2026)
IIP	6.70% (Sep-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Oct 30, 2026	51770	10729	63290	23294
Oct 23, 2026	52215	10690	62693	23093
1 Week change (%)	-0.85	0.36	0.95	0.87
1 Month change (%)	1.70	1.17	-8.22	-5.36
YTD Change (%)	7.00	7.82	22.10	-11.56

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Oct 30, 2026	113.10	139830	182442
Oct 23, 2026	116.93	141031	194170
1 Week Change (%)	-3.28	-0.85	-6.04
1 Month Change (%)	15.71	-5.27	-17.49
YTD Change (%)	59.99	5.42	-20.49

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Oct 30, 2026	94.91	127.07	106.21	60.24
Oct 23, 2026	94.94	126.96	106.35	60.53
1 Week Change (%)	-0.03	0.09	-0.13	-0.50
1 Month Change (%)	-1.19	0.00	-2.33	-1.18
YTD Change (%)	5.62	5.05	0.70	4.98

NEWS SUMMARY

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- Indian equity markets ended the week on a positive note after the U.S. Federal Reserve kept interest rates unchanged at its Oct 2026 meeting, in line with market expectations, while easing crude oil prices following renewed diplomatic efforts to deescalate tensions in the Middle East further supported sentiment. Recent foreign portfolio inflows, coupled with sustained domestic institutional buying, also strengthened the market's liquidity backdrop. Key benchmark indices BSE Sensex and Nifty 50 gained 1.83% and 2.00% respectively. The broader market indices, BSE 150 Midcap and BSE 250 Smallcap rose by 2.50% and 1.82% respectively. On the BSE sectoral front, most ended higher. BSE Healthcare was the major gainer, up 6.85%, followed by Metal and Auto, up 2.84% and 2.08%, respectively.

- Looking ahead, The Indian stock market is likely to showcase range-bound movement in the coming week as crude oil prices volatility, US mid-term elections, and US-Iran tensions are likely to drive sentiments. Investors will track India's manufacturing and services activity data, the September-quarter earnings season, new IPOs and key global economic indicators.

- The Index of Industrial Production (IIP) grew 6.7% YoY in Sep 2026, moderating from the downwardly revised 7.8% YoY growth recorded in Aug 2026. Manufacturing output expanded 7.6% YoY, compared with the revised 8.6% YoY growth in Aug 2026, while the Mining & Quarrying sector contracted 6.2% YoY during the month.

- The Employees' Provident Fund Organisation (EPFO) is framing guidelines to invest up to 3% of fresh annual inflows in startups and Alternative Investment Funds (AIFs), five years after receiving government approval, aiming to diversify its portfolio beyond traditional debt instruments.

NEWS SUMMARY

- The Finance Ministry's nowcasting model estimates India's GDP growth at 7.35% in Q2 FY27, supported by strong industrial output, energy consumption, port traffic, GST collections, and automobile sales, reflecting sustained economic momentum despite global uncertainties.

- Bond yields declined following a drop in U.S. Treasury yields and crude oil prices, while the U.S. Federal Reserve's decision to keep interest rates unchanged at its Oct 2026 policy meeting, along with a less hawkish tone, further supported sentiment. Yield on the 10-year benchmark paper (6.94% GS 2036) fell by 6 bps to close at 7.41% as compared to the previous week's close of 7.47%.

- India's micro, small, and medium enterprises (MSMEs) are exhibiting strong optimism regarding business conditions, as reflected in the rise of the MSME Business Confidence Index. The manufacturing sector showed notable improvement, with the index increasing from 59.5 to 61.0 during the quarter. The trading and services sectors also recorded improved sentiment, indicating a positive outlook across industries despite ongoing challenges.

- Foreign portfolio investors (FPIs) withdrew Rs 34,843 crore from Indian equities in October, marking the second consecutive month of heavy outflows, amid concerns over elevated crude oil prices, global interest rates and the corporate earnings outlook. However, foreign investors turned net buyers towards the end of the month, infusing around Rs 6,300 crore during October 26-30.

- European equity markets rose as investors assessed earnings and central bank policy signals, while expectations of stable interest rates supported sentiment despite lingering inflation concerns.

NEWS SUMMARY

- Asian equity markets closed on a mixed note as investors reacted to the U.S. Federal Reserve's rate decision and earnings reports from major technology companies. Ongoing diplomatic efforts by key Middle Eastern powers to prevent an escalation of tensions between the U.S. and Iran helped limit regional losses.

- US markets mostly declined following disappointing quarterly results from major companies, which amplified growing worries surrounding AI-related companies' massive spending on the nascent technology. All three main equity indexes closed lower on the week. The S&P 500 and the Nasdaq logged monthly losses, while the Dow exited October with a gain.

- The U.S. Federal Reserve decided to maintain the target range for the federal funds rate at 3.75% to 4.00% on Oct 28, 2026, in support of its dual mandate of achieving maximum employment and maintaining inflation at 2% over the longer run

- Japan’s leading index, which measures future economic activity, rose to 118.0 in Aug 2026 from 117.6 in the previous month, according to the Cabinet Office.

- Singapore's Consumer Price Index (CPI) rose 2.2% YoY in Sep 2026, following a 2.3% increase in Aug 2026, according to the Monetary Authority of Singapore (MAS) and the Ministry of Trade and Industry (MTI).

- Gold prices declined after the U.S. Federal Reserve held interest rates steady, as widely expected, but provided little clarity on its future policy path.

NEWS SUMMARY

- Brent crude oil prices slightly declined amid renewed diplomatic efforts to prevent a broader escalation of the U.S.-Iran conflict.

- The Indian rupee slightly rose against the U.S. dollar, supported by likely intervention from the Reserve Bank of India.

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