Weekly Market Monitor
17 April 2026

BiggPocket WEALTH MANAGEMENT
BiggPocket Fintech Private Limited
ARN No. - 325081 | APRN No. - APRN05683

Market Overview

The Indian equity market extended its recovery for a second week, with Sensex at 78,493 and Nifty 50 at 24,353. Midcaps (+3.5%) and small caps (+4.4%) outperformed, while valuations for large caps neared 52-week lows, attracting value buyers. Sectoral breadth was strong, led by Services, Metals, and PSE, though Auto (–0.8%) lagged. FIIs remained net buyers alongside steady DII inflows, reinforcing sentiment. Liquidity stayed balanced with G-Sec yields easing to 6.95%. Inflation picked up, with WPI at 3.88% and CPI at 3.40%, while IIP growth improved to 5.2%. Gold and silver remained elevated, crude eased to $94.69, and INR stayed stable. Globally, NASDAQ (+6.5%), KOSPI (+5.7%), and MSCI EM (+3.7%) gains amplified India's recovery narrative.

Weekly Market Review & Key Highlights
17 April 2026

Indian Equity Market

1. Market Performance- Markets extended recovery for a second consecutive green week — broad indices posted steady gains, sustaining the short-term reversal in sentiment. Sensex rose to 78,493 and Nifty 50 to 24,353, building on last week's rebound. Nifty Next 50 (+3.9%), Midcap 150 (+3.5%), Small cap 250 (+4.4%) — all segments participated, with small and midcaps continuing to outperform.
2. P/E Valuations- Indices near 52-week P/E lows: Sensex 20.15x (26.04-20.15), Nifty 50 19.96x (23.04-19.63), Midcap 150 31.2x (36.57-29.73), Small cap 250 26.65x (34.2-24.12) — large caps attractive, mid/small still premium. Large cap approach fair value, tempting value buyers while midcaps risk further derating.
3. Sectoral Indices- Services +4.9%, Metal +4.2%, PSE +4.1%, gains — broad participation with cyclicals, commodities and defensives all in green. FMCG +3.0%, IT +2.5%, Oil & Gas +1.9%, Pharma +1.5%, Bank +1.2% also advanced. Auto (–0.8%) was the lone sectoral laggard amid global macro concerns — sectoral breadth confirms a genuine risk-on week.
4. FII vs DII- FIIs remained net buyers this week, continuing the sentiment shift seen last week after weeks of sustained selling. Supported by continued DII activity, the dual tailwind for markets remains intact. Sustained FII participation is key to whether the recovery extends into a durable trend.
5. Money Market & RBI Monetary Policy- G-Sec 10yr eased slightly to 6.95% from 7.01% last week; Call Money at 5.11%, T-Bills at 5.21% — liquidity conditions remain balanced. Rate hold with neutral stance continues to support equity valuations; rising.
6. Macro Indicators- WPI jumped to 3.88% in Mar'26 (from 2.13% in Feb'26) — a 38-month high, last seen in Jan'23, driven by the West Asia conflict-led surge in crude petroleum & natural gas prices. CPI rose to 3.40% in Mar'26 (from 3.21% in Feb'26) IIP grew 5.2% in Feb'26 (4.8% in Jan'26).
7. Commodities & Currency- Gold at ₹1,50,852/10g (+0.8% WoW), Silver at ₹2,47,739/kg (+3.3% WoW) — precious metals remain elevated amid global safe-haven demand. Brent Crude at $94.69/barrel (–3.2% WoW) — pulled back from recent highs but remains a macro risk given West Asia tension. USD/INR broadly stable at 92.72; Rupee marginally appreciated vs GBP and EUR.
8. Global Markets- NASDAQ +6.5% to 24,345, KOSPI +5.7% to 6,191, MSCI EM +3.7% to 1,602, — global risk-on tone broadly aided domestic sentiment. Strong global cues and continued FII buying reinforce the week's recovery narrative for Indian markets.

Indian Equity Market

Indices	17 Apr '26	WTD%	MTD%	CYTD%	1Yr%	3Yrs%
BSE Sensex	78493.54	1.22	9.10	-7.93	1.98	9.14
Nifty 50 Index	24353.55	1.26	9.06	-6.95	3.24	12.50
Nifty Next 50 Index	70273.80	3.89	16.44	1.08	10.45	23.00
Nifty Midcap 150 Index	22045.20	3.50	13.45	-1.25	14.16	24.20
Nifty Smallcap 250 Index	16439.25	4.36	15.05	-1.61	7.00	22.45
Nifty 500 Index	22869.40	2.34	11.41	-4.37	6.49	16.45

P/E

Indices	17 Apr '26	52 Weeks H/L	YOY%	EPS
BSE Sensex	21.55	26.04 - 20.15	0.03	3,642
Nifty 50 Index	21.38	23.04 - 19.63	-0.01	1,139
Nifty Next 50 Index	19.90	22.40 - 17.34	-0.02	3,531
Nifty Midcap 150 Index	34.71	35.57 - 29.73	-0.27	635
Nifty Smallcap 250 Index	29.80	34.2 - 24.12	-0.45	552
Nifty 500 Index	23.65	25.34 - 21.32	-0.11	967

Sectoral Indices

Indicies	17 Apr'26	10 Apr '26	WOW%
Nifty Services	31,265.60	29,818.90	4.85
Nifty Metal	12,880.00	12,356.40	4.24
Nifty PSE	10,588.35	10,173.10	4.08
Nifty Media	1,416.60	1,365.20	3.77
Nifty Realty	786.90	759.25	3.64
Nifty Commodities	10,083.20	9,754.60	3.37
Nifty FMCG	49,657.75	48,194.05	3.04
Nifty IT	31,809.85	31,030.60	2.51
Nifty Oil & Gas	11,409.95	11,193.40	1.93
Nifty Pharma	22,497.25	22,164.85	1.50
Nifty Financial Services 25/50	29,011.10	28,584.35	1.49
Nifty Bank	56,565.70	55,912.75	1.17
Nifty Private Bank	27,087.45	26,779.95	1.15
Nifty PSU	8,862.90	8,778.25	0.96
Nifty Auto	26,435.00	26,640.90	-0.77

Commodity & Currency

Commodities	17 Apr'26	10 Apr'26	WOW%
Gold (₹/10 g)	1,50,852.00	1,49,646.00	-0.80
Silver ((₹/1 Kg)	2,47,739.00	2,39,775.00	-3.21
Brent Crude Oil ($/Barrel)	94.69	97.87	3.36
GBP/INR	125.27	124.31	-0.77
EUR/INR	109.20	108.28	-0.85
USD/INR	92.72	92.65	-0.08

Global Equity Markets

Country	Global Performances	17 Apr'26	10 Apr'26	WOW%	YOY%
USA	NASDAQ composite	24,345.48	22,853.68	6.53	47.99
South Korea	KOSPI	6,191.92	5,858.87	5.68	150.64
MSCI Emerging	MSCI Emerging Markets Index	1,602.26	1,545.34	3.68	50.17
Germany	DAX	24,699.13	23,948.99	3.13	16.41
MSCI World	MSCI World Index	4,609.31	4,471.04	3.09	32.68
Japan	Nikkei 225	58,475.90	56,924.11	2.73	70.10
French	CAC 40	8,427.04	8,259.60	2.03	15.70
China	Shanghai Composite	4,051.43	3,986.22	1.64	23.51
UK	FTSE 100	10,646.16	10,600.98	0.43	28.67

...Badho, Befikar

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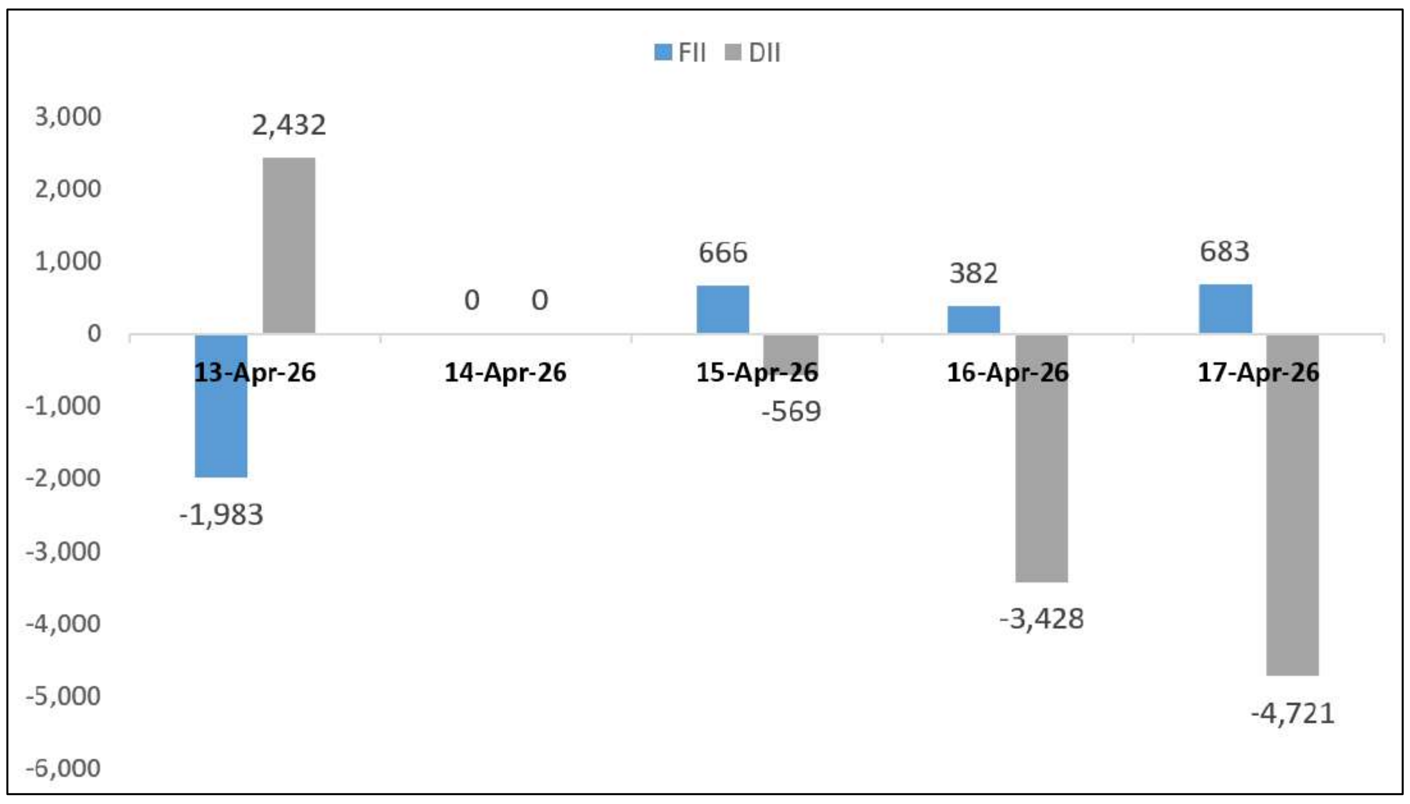
FII VS DII



Macro Indicators

Indicators	Dec'25	Jan'25	Feb'25	Mar'26
CPI % YOY	1.33	2.75	3.21	3.40
WPI% YOY	0.83	1.81	2.13	3.88
IIP% YOY	7.80	4.80	5.20	N.A
PMI	57.80	59.50	58.10	57.00

Debt

Money Market			
Liquidity Indicators	17 Apr'26	10 Apr'26	03 Apr'26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.25%	3.25%	3.25%
Call Money	5.11%	5.05%	5.46%
Treasury Bills	5.21%	5.31%	0.00%
G-Sec (10 yr)	6.95%	7.01%	7.01%

Top 5 Gainers

S.No	Top Gainers	17 Apr'26	10 Apr'26	WOW%
1	Gallantt Ispat Ltd	864.00	658.50	31.21
2	Gujarat Mineral Development	736.90	603.10	22.19
3	Aditya Infotech Ltd	2,282.00	1,894.40	20.46
4	Nava Limited	703.10	601.95	16.80
5	Radico Khaitan Ltd.	3,183.60	2,792.70	14.00

Top 5 Losers

S.No	Top Gainers	17 Apr'26	10 Apr'26	WOW%
1	Jyoti CNC Automation	707.30	819.20	-13.66
2	Indus Towers Ltd	412.25	437.85	-5.85
3	Just Dial Ltd	549.70	581.50	-5.47
4	SJS Enterprises Ltd	1,703.80	1,793.40	-5.00
5	Coromandel International Ltd	2,052.00	2,154.80	-4.77

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