



Weekly Market Monitor

18 September 2026

Market Overview

The Indian equity market stabilised after the previous week's sharp decline, with Sensex falling 0.65% to 74,295 and Nifty 50 easing 0.22% to 23,346. Broader markets were mixed, with Midcap 150 gaining 0.24% while Smallcap 250 declined 0.29%. Valuations remained near 52-week lows at around 19.7x P/E, offering a relatively subdued valuation backdrop. Brent crude stayed above \$100 at \$101.91/barrel, while gold and silver gained on renewed safe-haven demand. The 10-year G-Sec yield rose to 7.08%, reflecting continued crude and inflation pressures. Globally, markets were mixed. Domestic inflation remained elevated, with CPI rising to 4.82% and WPI to 9.92%, while PMI improved to 54.3, signalling a recovery in manufacturing activity.

Weekly Market Review & Key Highlights

18 September 2026

Indian Equity Market

1. **Indian Equity Markets:** Markets stabilised this week after a sharp prior decline. BSE Sensex closed at 74,294.96 (-0.65% WTD) and Nifty 50 at 23,346.40 (-0.22% WTD) both losses narrowing sharply versus the previous week. Nifty Midcap 150 was the sole gainer, up 0.24% WTD, while Smallcap 250 slipped -0.29% and Nifty Next 50 eased -0.08%. Valuations remain at multi-year lows Sensex P/E at 19.68x and Nifty 50 at 19.74x both sitting at or near their 52-week floor.
2. **Commodities & Currency:** Brent Crude eased slightly to \$101.91/barrel (-0.56% WoW), holding above the \$100 mark. Gold rose 1.07% WoW to ₹1,53,176/10g and Silver climbed 3.47% WoW to ₹2,37,062/kg, as some renewed safe-haven demand returned. The Rupee was broadly stable at ₹95.79/USD 0.07% WoW. GBP/INR and EUR/INR both eased to ₹128.09 (-1.05%) and ₹109.99 (-1.05%) respectively, reflecting a firmer Dollar.
3. **Money Market & RBI Policy Rates:** The 10-year G-Sec yield rose further to 7.08% from 7.04% last week and 6.97% two weeks ago an 11 bps rise over the fortnight extending its run above the 7% mark, driven by continued crude and inflation pressures. Call Money edged up to 5.09% from 5.02%, and Treasury Bills rose to 5.28% from 5.21%.
4. **Global Equity Markets:** Global markets were mixed this week. Nikkei 225 led gainers at 1.57% WoW, followed by Shanghai Composite 0.61% and NASDAQ, 0.29%. On the downside, CAC 40 fell -1.14%, MSCI Emerging Markets -0.88% and MSCI World -0.61%.
5. **Macro Indicators:** CPI rose to 4.82% YoY in August from 4.45% in July, continuing its upward trend. WPI also rose to 9.92% YoY in August from 9.78% in July, though it remains below June's 9.87% level, indicating a mixed wholesale price trend. PMI recovered to 54.3 in August from 53.3 in July, reversing the recent moderation trend and signalling a rebound in manufacturing activity a constructive signal for industrial output ahead.

Indian Equity Market

Indicies	18-Sept-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	74294.96	-0.65	-3.46	-12.86	-10.50	3.20
Nifty 50 Index	23346.40	-0.22	-3.05	-10.80	-7.13	6.08
Nifty Next 50 Index	72025.40	-0.08	-2.35	3.60	3.82	16.58
Nifty Midcap 150 Index	22901.85	0.24	-2.70	2.59	4.01	14.69
Nifty Smallcap 250 Index	18287.40	-0.29	-0.46	9.45	3.66	14.22
Nifty 500 Index	22840.55	-0.11	-2.60	-4.49	-2.49	9.69

P/E

Indicies	18-Sept-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	19.68	23.70 - 19.68	-0.12	3,775
Nifty 50 Index	19.74	22.92 - 19.62	-0.08	1,183
Nifty Next 50 Index	19.04	21.64 - 17.09	-0.07	3,783
Nifty Midcap 150 Index	28.64	34.83- 27.81	-0.11	800
Nifty Smallcap 250 Index	33.74	36.42 - 23.43	0.07	542
Nifty 500 Index	22.13	24.91 - 20.96	-0.03	1,032

Sectoral Indices

Indicies	18-Sept-26	11-Sept-26	WOW%
Nifty Media	1553.75	1537.20	1.08
Nifty FMCG	45466.80	45053.75	0.92
Nifty Pharma	26710.10	26532.40	0.67
Nifty Metal	13052.60	12999.05	0.41
Nifty Services	30073.10	29969.35	0.35
Nifty Oil & Gas	10948.70	10937.00	0.11
Nifty Commodities	9566.55	9579.80	-0.14
Nifty IT	28854.55	28921.50	-0.23
Nifty Financial Services 25/50	27552.00	27625.90	-0.27
Nifty PSU	8317.55	8349.90	-0.39
Nifty Bank	56358.70	56606.55	-0.44
Nifty Realty	844.20	848.50	-0.51
Nifty Private Bank	27290.00	27436.00	-0.53
Nifty Auto	27129.00	27304.50	-0.64
Nifty PSE	9597.00	9688.40	-0.94

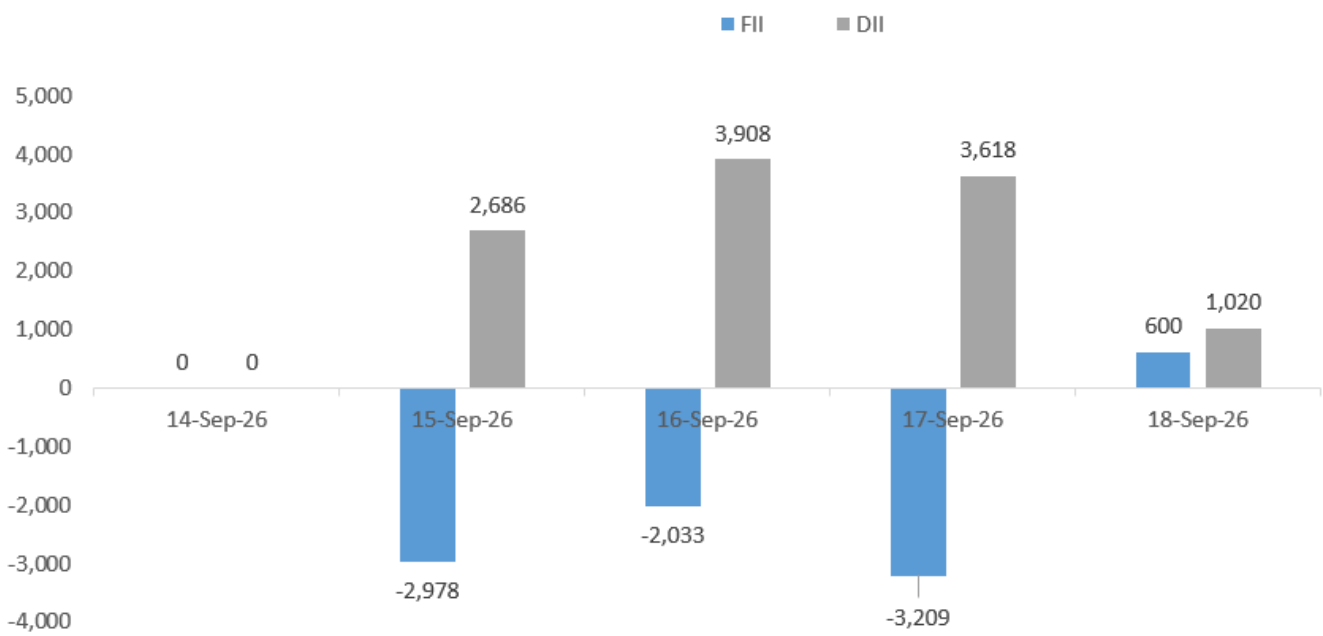
Commodity & Currency

Commodities	18-Sept-26	11-Sept-26	WOW%
Gold (₹/10 g)	153,176.00	151,549.00	1.07
Silver(₹/1 Kg)	237,062.00	229,113.00	3.47
Brent Crude Oil (\$/Barrel)	101.91	102.48	-0.56
GBP/INR	128.09	129.45	-1.05
EUR/INR	109.99	111.15	-1.05
USD/INR	95.79	95.72	0.07

Global Equity Markets

Country	Global Performances	18-Sept-26	11-Sept-26	WOW%	YOY%
Japan	Nikkei 225	65,018.95	64,011.34	1.57	43.52
China	Shanghai Composite	3,911.87	3,888.11	0.61	2.09
United States	NASDAQ composite	26,418.30	26,342.50	0.29	17.57
United Kingdom	FTSE 100	10,697.57	10,702.61	-0.05	16.04
South Korea	KOSPI	6,894.23	6,909.91	-0.23	99.18
Germany	DAX	25,431.04	25,571.78	-0.55	7.39
MSCI World	MSCI World Index	4,911.08	4,941.15	-0.61	14.76
MSCI Emerging	MSCI Emerging Markets Index	1,710.02	1,725.12	-0.88	27.07
France	CAC 40	8,086.42	8,179.77	-1.14	2.96

FII VS DII



Macro Indicators

Indicators	Aug'26	Jul'26	Jun'26	May'26
CPI % YOY	4.82	4.45	4.38	3.93
WPI% YOY	9.92	9.78	9.87	9.68
IIP% YOY	N.A	6.70	7.30	5.10
PMI	54.3	53.3	57.1	59.3

Debt

Money Market			
Liquidity Indicators	18-Sept-26	11-Sept-26	04-Sept-26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.09%	5.02%	4.94%
Treasury Bills	5.28%	5.21%	5.25%
G-Sec (10 yr)	7.08%	7.04%	6.97%

Top 5 Gainers

S.No	Top Gainers	18-Sept-26	11-Sept-26	WOW%
1	Yatharth Hospital & Trauma Care Services	1,139.50	966.30	17.92
2	Tata Chemicals Ltd	693.25	612.45	13.19
3	Tega Industries Ltd	1,945.05	1,731.10	12.36
4	Avalon Technologies Ltd	2,537.70	2,264.50	12.06
5	EIH Ltd	317.90	286.45	10.98

Top 5 Losers

S.No	Top Gainers	18-Sept-26	11-Sept-26	WOW%
1	Solar Industries India Ltd	18,555.00	22290.00	-16.76
2	Aditya Infotech Ltd	3355.10	3825.50	-12.30
3	Apollo Micro Systems	370.70	422.25	-12.21
4	Relaxo Footwears Ltd	291.25	324.95	-10.37
5	Chennai Petroleum Corporation Ltd	1416.60	1572.90	-9.94

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