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

Market Overview

The Indian equity market remained under pressure for the second consecutive week, with Sensex declining 0.60% to 77,541 and Nifty 50 falling 0.47% to 24,252, while broader markets remained resilient with Smallcap 250 gaining 0.74%. Valuations eased further toward 52-week lows, supporting the long-term entry case. Sectoral performance was mixed, with Metal, Realty, Media, and Private Banks gaining, while IT and FMCG led declines. Gold and silver surged nearly 5% each to fresh highs amid strong safe-haven demand, while Brent crude rose 6.87% to $86.83, adding to inflation and import bill concerns. The 10-year G-Sec yield rose to 6.88%, while global markets broadly declined, led by losses in Nikkei, NASDAQ, and European indices, with MSCI Emerging Markets being the only notable gainer.

Weekly Market Review & Key Highlights

21 August 2026

Indian Equity Market

1. **Indian Equity Markets**: Markets remained under pressure for the second consecutive week, with BSE Sensex closing at 77,540.83, -0.60% WTD and Nifty 50 at 24,252, -0.47% WTD. MTD losses deepened to -0.71% and -0.54% respectively, with CYTD losses widening to -9.05% for Sensex and -7.34% for Nifty 50. Broader markets showed resilience Smallcap 250 gained 0.74% WTD and Midcap 150 was nearly flat -0.05% WTD. Valuations eased further to Sensex P/E 20.54x and Nifty 50 at 20.50x both approaching the 52-week low zone, keeping the long-term entry case intact.
2. **Sectoral Performance:** Sectoral action was mixed with a defensive tilt. Metal, 1.78%, Realty 1.78%, Media 1.42%, and Private Bank 1.26% were the notable gainers, while Bank 0.47% managed a modest positive return. On the downside, IT led losses at -2.63%, followed by FMCG -2.27%, PSU -1.36%, Services -0.62%, and PSE -0.58%. Auto -0.29%, Pharma -0.32%, Commodities -0.18%, and Oil & Gas -0.15% were marginally negative pointing to selective buying in value and cyclical names amid broader caution.
3. **Commodities & Currency**: Gold surged 4.88% WoW to ₹1,59,802/10g and Silver rallied 4.79% WoW to ₹2,45,458/kg both hitting fresh highs reflecting strong safe-haven demand amid global equity weakness and geopolitical uncertainty. Brent Crude rose 6.87% WoW to $86.83/barrel, adding to inflation concerns for India's import bill. The Rupee weakened marginally to ₹95.75/USD, 0.34% WoW. GBP/INR and EUR/INR also firmed to ₹130.66 (+1.42%) and ₹111.97 (+1.67%) respectively, reflecting broad USD softness.
4. **Money Market & RBI Policy Rates:** The 10-year G-Sec yield rose to 6.88% from 6.77% last week and 6.80% two weeks ago an 11 bps uptick likely reflecting the twin pressures of rising crude oil and firming precious metals pushing inflation expectations higher. Call Money eased slightly to 5.19% from 5.23%, while Treasury Bills were broadly flat at 5.26%.
5. **Global Equity Markets:** Global markets turned broadly negative this week. MSCI Emerging Markets was the lone gainer at 1.08% WoW, while FTSE 100 was nearly flat at -0.09%. Most major indices declined NASDAQ fell -2.75%, Nikkei 225 dropped -3.93%, DAX slipped -1.80%, CAC 40 -2.27%, MSCI World -1.71%, KOSPI -0.93%, and Shanghai Composite -0.56%. On a YoY basis, KOSPI 120.04% and Nikkei 54.93% remain global standouts, while India's Nifty 50 slipped to -2.21% YoY.

Indian Equity Market

Indices	21-Aug-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	77540.83	-0.60	-0.71	-9.05	-5.44	5.93
Nifty 50 Index	24252.00	-0.47	-0.54	-7.34	-2.21	9.14
Nifty Next 50 Index	73992.10	-0.66	0.46	6.43	9.87	20.31
Nifty Midcap 150 Index	23407.70	-0.05	1.16	4.85	9.13	18.80
Nifty Smallcap 250 Index	18414.45	0.74	2.76	10.21	8.10	18.10
Nifty 500 Index	23530.30	-0.27	0.30	-1.61	2.53	13.03

P/E

Indices	21-Aug-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.54	23.60 - 20.15	-0.13	3,775
Nifty 50 Index	20.50	22.92 - 19.62	-0.10	1,183
Nifty Next 50 Index	19.56	22.07 - 17.09	-0.11	3,783
Nifty Midcap 150 Index	29.82	35.30- 27.81	-0.16	785
Nifty Smallcap 250 Index	33.98	36.42 - 23.43	-0.01	542
Nifty 500 Index	22.86	25.17 - 20.96	-0.09	1,029

Sectoral Indices

Indices	21-Aug-26	14-Aug-26	WOW%
Nifty Metal	13172.60	12941.70	1.78
Nifty Realty	911.60	895.65	1.78
Nifty Media	1612.70	1590.10	1.42
Nifty Private Bank	27590.65	27247.25	1.26
Nifty Bank	57761.95	57491.10	0.47
Nifty Financial Services 25/50	28558.85	28568.50	-0.03
Nifty Oil & Gas	11182.75	11200.05	-0.15
Nifty Commodities	9804.60	9822.75	-0.18
Nifty Auto	29124.60	29207.90	-0.29
Nifty Pharma	26359.75	26445.55	-0.32
Nifty PSE	9788.30	9844.95	-0.58
Nifty Services	30936.50	31128.25	-0.62
Nifty PSU	8620.00	8738.80	-1.36
Nifty FMCG	47510.95	48615.05	-2.27
Nifty IT	30532.25	31357.75	-2.63

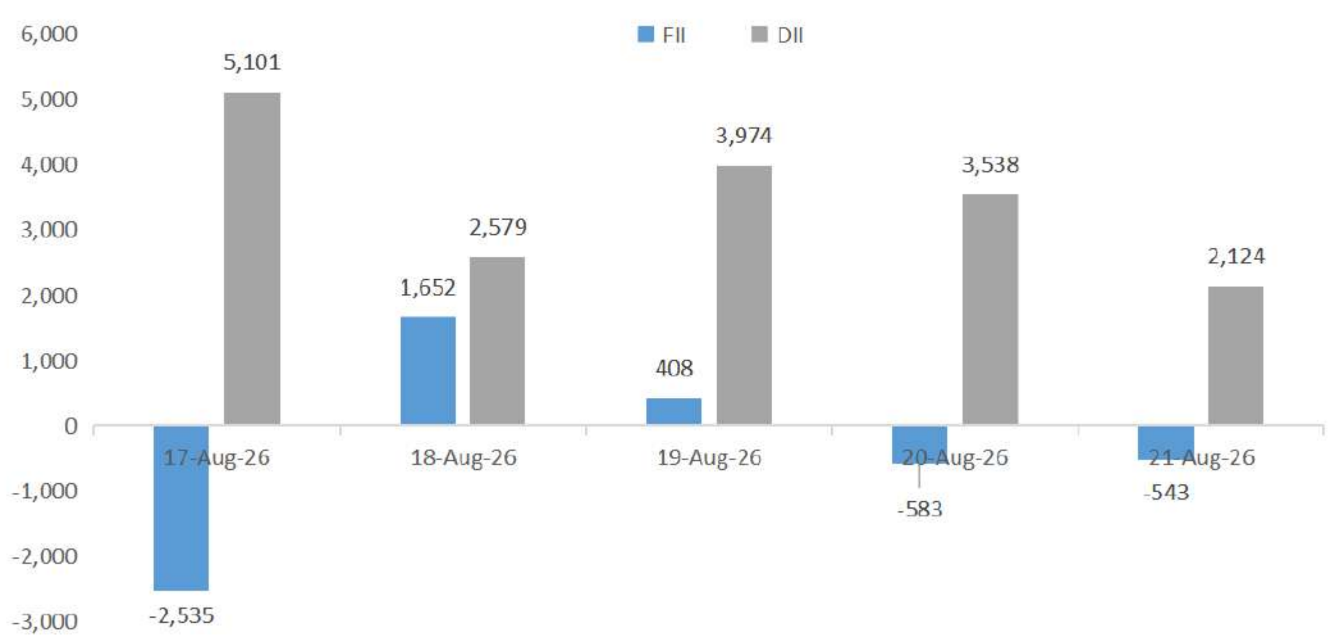
Commodity & Currency

Commodities	21-Aug-26	14-Aug-26	WOW%
Gold (₹/10 g)	1,59,802.00	1,52,368.00	4.88
Silver((₹/1 Kg)	2,45,458.00	2,34,230.00	4.79
Brent Crude Oil ($/Barrel)	86.83	81.25	6.87
GBP/INR	130.66	128.83	1.42
EUR/INR	111.97	110.13	1.67
USD/INR	95.75	95.43	0.34

Global Equity Markets

Country	Global Performances	21-Aug-26	14-Aug-26	WOW%	YOY%
MSCI Emerging	MSCI Emerging Markets Index	1,721.28	1,702.81	1.08	36.41
United Kingdom	FTSE 100	10,761.43	10,771.43	-0.09	15.60
China	Shanghai Composite	3,905.20	3,927.18	-0.56	3.56
South Korea	KOSPI	6,912.95	6,977.94	-0.93	120.04
MSCI World	MSCI World Index	4,951.83	5,037.96	-1.71	19.84
Germany	DAX	26,051.79	26,529.96	-1.80	7.72
France	CAC 40	8,459.46	8,655.78	-2.27	6.58
United States	NASDAQ composite	26,067.17	26,803.03	-2.75	23.54
Japan	Nikkei 225	66,016.36	68,713.80	-3.93	54.93

FII VS DII



Macro Indicators

Indicators	Jul'26	Jun'26	May'26	Apr'26
CPI % YOY	4.45	4.38	3.93	3.48
WPI% YOY	9.78	9.87	9.68	8.30
IIP% YOY	N.A	7.30	5.10	4.90
PMI	53.30	57.10	59.30	58.20

Debt

Money Market			
Liquidity Indicators	**21-Aug-26**	**14-Aug-26**	**07-Aug-26**
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.19%	5.23%	5.09%
Treasury Bills	5.26%	5.26%	5.28%
G-Sec (10 yr)	6.88%	6.77%	6.80%

Top 5 Gainers

S.No	Top Gainers	21-Aug-26	14-Aug-26	WOW%
1	Welspun Corp Ltd	2,311.90	1,882.00	22.84
2	Jyoti CNC Automation Ltd (JYCA)	988.80	826.90	19.58
3	Balrampur Chini	729.35	624.85	16.72
4	Kiri Industries Ltd	477.90	411.45	16.15
5	Aegis Logistics	2,183.80	1,940.80	12.52

Top 5 Losers

S.No	Top Gainers	21-Aug-26	14-Aug-26	WOW%
1	Himadri Speciality Chemical Ltd	654.40	781.05	-16.22
2	Schneider Electric Infrastructure Ltd	1217.30	1369.20	-11.09
3	Belrise Industries Ltd	231.77	255.35	-9.23
4	Aster DM Quality Care Limited	761.55	822.35	-7.39
5	Aadhar Housing Finance Ltd	462.55	498.20	-7.16

Let's Grow Together

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Customer Care

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