Weekly Market Monitor
24 April 2026

BiggPocket WEALTH MANAGEMENT

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

Market Overview

The Indian equity market snapped its two-week recovery, closing lower as a sharp IT selloff dragged indices. Sensex fell to 76,664 and Nifty 50 to 23,898, while midcaps and small caps showed relative resilience. Valuations remain near 52-week lows, keeping large caps attractive despite compressed IT multiples. Defensives like FMCG (+2.2%) and Pharma (+0.4%) held up, but IT (–10.3%) posted its worst week since March 2020, pulling down Services and Financials. FIIs turned aggressive sellers with ₹17,140 Cr outflows, partly offset by DII buying of ₹9,782 Cr. Liquidity stayed balanced, gold and silver rose, crude eased slightly, and INR weakened to 92.72. Globally, Asian markets gained, but domestic sentiment was overshadowed by IT weakness and heavy FII outflows.

Weekly Market Review & Key Highlights
24 April 2026

Indian Equity Market

1. Market Performance Markets snapped a two-week recovery streak, closing in the red amid a sharp tech-sector selloff. Sensex fell to 76,664 and Nifty 50 to 23,898, reversing a portion of prior gains. Nifty Next 50 (–0.55%), Midcap 150 (–0.77%), Small cap 250 (–0.15%) — all segments ended lower, though small and midcaps showed relative resilience.

2. P/E Valuations Indices continue to trade near 52-week P/E lows: Sensex 20.98x (52W: 26.04–20.15), Nifty 50 20.85x (23.00–19.63), valuations remain at attractive levels. The correction in IT further compresses sector-level multiples. Sustained earnings delivery remains the key trigger for any meaningful re-rating.

3. Sectoral Indices FMCG +2.2%, Media +1.6%, Pharma +0.4% — defensive and consumption-oriented sectors held up. IT (–10.3%) was the stark outlier, recording its worst weekly performance since March 2020, dragging Services (–2.5%), Auto (–2.96%), Bank (–0.84%) and Financial Services (–1.78%) lower — sectoral breadth reflects a concentrated but deeply impactful risk-off move driven by earnings disappointment in technology.

4. FII vs DII FIIs turned aggressive net sellers this week, offloading ₹17,140 Cr — with a single-day outflow of ₹8,828 Cr on Friday, 24 Apr the largest daily selling of recent weeks. The selling was concentrated in IT and financial heavyweights. DIIs provided a partial offset, buying ₹9,782 Cr net over the week. The FII-DII divergence signals that domestic institutions are holding the market, but sustained FII selling remains a key risk to the near-term recovery.

5. Money Market & RBI Monetary Policy G-Sec 10yr eased slightly to 6.95% from 7.01% last week; Call Money steady at 5.11%, T-Bills at 5.215% — liquidity conditions remain balanced.

6. Commodities & Currency Gold at ₹1,51,097/10g (+0.59% WoW), Silver at ₹2,47,739/kg (+2.80% WoW) — precious metals remain elevated amid global safe-haven demand. Brent Crude at $94.69/barrel (–1.21% WoW) — pulled back marginally but remains above $94, continuing to weigh on import costs and corporate margins. USD/INR weakened to 92.72 (depreciated 1.67% WoW); adding to imported inflation pressure.

7. Global Markets KOSPI +4.58% to 6,476, Nikkei +2.12% to 59,716, Shanghai +0.70% to 4,080, Asian and US markets broadly positive and European indices lagged Mixed global cues provided limited relief to domestic markets, as the IT-led selloff and heavy FII outflows overshadowed any positive carry-over from global risk-on sentiment.

Indian Equity Market

Indices	24-Apr-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	76664.21	-2.33	6.56	-10.08	−3.93	8.50
Nifty 50 Index	23897.95	-1.87	7.02	-8.69	-0.31	11.73
Nifty Next 50 Index	69883.95	-0.55	15.80	0.52	7.09	22.87
Nifty Midcap 150 Index	21875.95	-0.77	12.58	-2.01	9.02	23.80
Nifty Small cap 250 Index	16414.65	-0.15	14.88	-1.76	3.73	22.13
Nifty 500 Index	22570.05	-1.31	9.95	-5.62	2.74	15.88

P/E

Indices	24-Apr-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.98	26.04 - 20.15	0.00	3,654
Nifty 50 Index	20.85	23.00 - 19.63	-0.03	1,146
Nifty Next 50 Index	19.79	22.40 - 17.10	-0.04	3,531
Nifty Midcap 150 Index	34.24	35.57 - 29.00	-0.28	639
Nifty Small cap 250 Index	29.67	34.20 - 23.40	-0.47	553
Nifty 500 Index	23.22	25.34 - 21.00	-0.13	972

Sectoral Indices

Indicies	24-Apr-26	17-Apr-26	wow%
Nifty FMCG	50,766.25	49,657.75	2.23
Nifty Media	1,438.70	1,416.60	1.56
Nifty Pharma	22,580.10	22,497.25	0.37
Nifty Commodities	10,108.80	10,083.20	0.25
Nifty PSE	10,597.20	10,588.35	0.08
Nifty PSU	8,811.20	8,862.90	-0.58
Nifty Oil & Gas	11,331.70	11,409.95	-0.69
Nifty Bank	56,089.75	56,565.70	-0.84
Nifty Metal	12,746.65	12,880.00	-1.04
Nifty Realty	778.00	786.90	-1.13
Nifty Private Bank	26,717.30	27,087.45	-1.37
Nifty Financial Services 25/50	28,493.85	29,011.10	-1.78
Nifty Services	30,471.30	31,265.60	-2.54
Nifty Auto	25,652.85	26,435.00	-2.96
Nifty IT	28,530.60	31,809.85	-10.31

Commodity & Currency

Commodities	24-Apr-26	17-Apr-26	wow%
Gold (₹/10 g)	1,50,212.00	1,51,097.00	0.59
Silver ((₹/1 Kg)	2,40,989.00	2,47,739.00	2.80
Brent Crude Oil ($/Barrel)	95.85	94.69	-1.21
GBP/INR	126.95	125.27	-1.32
EUR/INR	110.14	109.20	-0.85
USD/INR	94.30	92.72	-1.67

Global Equity Markets

Country	Global Performances	24-Apr-'26	17-Apr'26	wow%	yoy%
South Korea	KOSPI	6,475.63	6,191.92	4.58	156.73
Japan	Nikkei 225	59,716.18	58,475.90	2.12	70.43
China	Shanghai Composite	4,079.90	4,051.43	0.70	23.73
MSCI Emerging	MSCI Emerging Markets Index	1,611.30	1,602.26	0.56	47.42
USA	NASDAQ composite	24,558.04	24,468.48	0.37	43.06
MSCI World	MSCI World Index	4,610.46	4,609.31	0.02	28.21
UK	FTSE 100	10,410.61	10,646.16	-2.21	23.83
Germany	DAX	24,139.85	24,699.13	-2.26	9.41
French	CAC 40	8,175.14	8,427.04	-2.99	8.96

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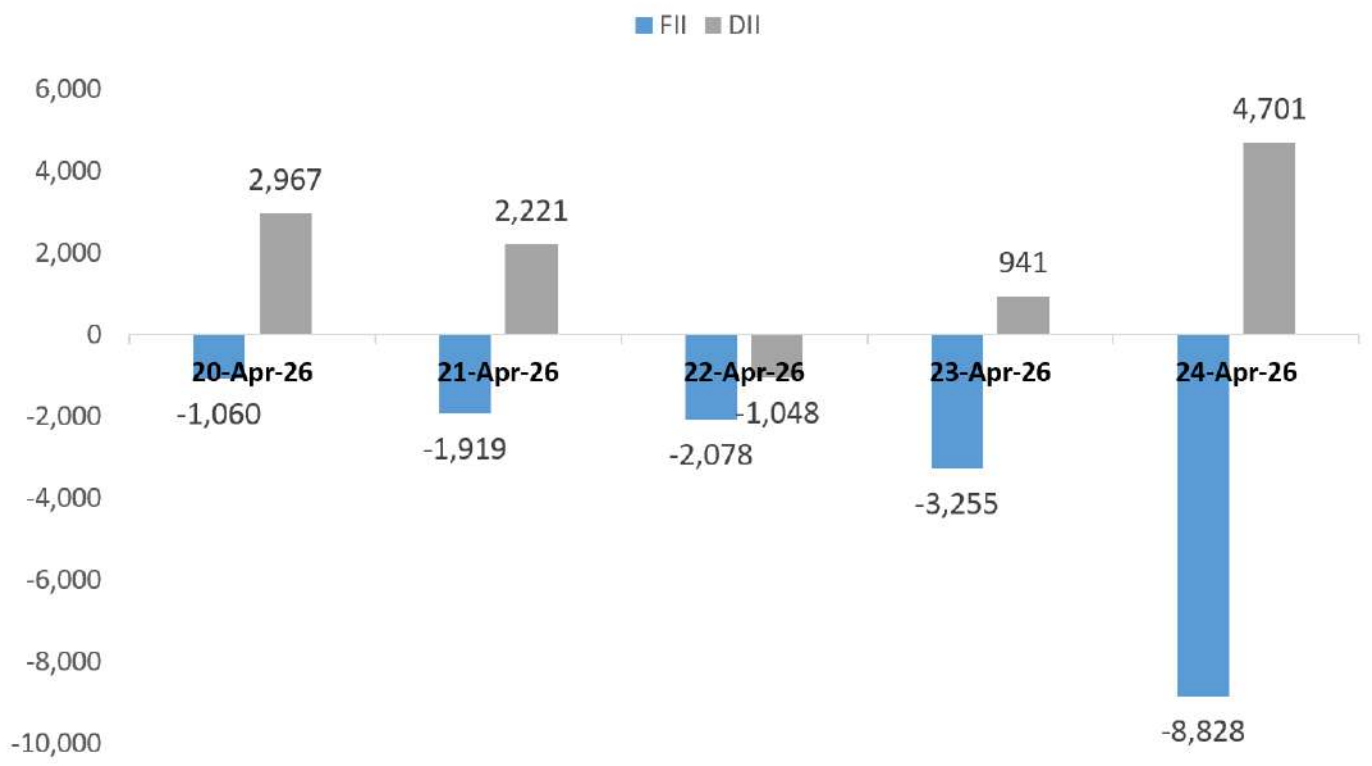
FII VS DII



Macro Indicators

Indicators	Dec'25	Jan'26	Feb'26	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	24-Apr-26	17-Apr-26	10-Apr-26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.25%	3.25%	3.25%
Call Money	5.11%	5.11%	5.05%
Treasury Bills	5.22%	5.21%	5.31%
G-Sec (10 yr)	7.01%	6.95%	7.01%

Top 5 Gainers

S.No	Top Gainers	24-Apr'26	17-Apr'26	wow%
1	OneSource Specialty Pharma Ltd	1,824.30	1,543.50	18.19
2	Himadri Specialty Chemical Ltd	566.15	493.55	14.71
3	Schneider Electric Infrastructure Ltd	1,180.10	1,036.05	13.90
4	Adani Energy Solutions Ltd	1,411.95	1,259.80	12.08
5	Oracle Financial Services Software Ltd	8,949.00	7,992.50	11.97

Top 5 Losers

S.No	Top Gainers	24-Apr'26	17-Apr'26	wow%
1	HCL Technologies Ltd	1,203.20	1,442.30	-16.58
2	Persistent Systems Ltd	4,747.30	5,446.50	-12.84
3	Coforge Limited	1,150.90	1,316.80	-12.60
4	Infosys	1,154.60	1,318.70	-12.44
5	Mphasis Ltd	2,175.80	2,462.20	-11.63

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