



Weekly Market Monitor

25 September 2026

Market Overview

The Indian equity market continued to consolidate, with Sensex declining 0.54% to 73,896 and Nifty 50 falling 0.88% to 23,141. Broader markets remained under pressure, led by a 2.03% decline in Midcap 150, while valuations touched fresh yearly lows at around 19.6x P/E. Sectoral performance was mixed, with Realty, Pharma and FMCG gaining, while IT, Services and Financial Services declined. Brent crude eased 7.16% to \$94.61/barrel, offering some relief to India's import bill, while the Rupee remained broadly stable. The 10-year G-Sec yield rose further to 7.17% amid persistent inflation and crude-related pressures. Global markets were largely positive, while CPI and WPI remained elevated and PMI held at 54.3, indicating stable manufacturing momentum.

Weekly Market Review & Key Highlights

25 September 2026

Indian Equity Market

1. **Indian Equity Market-** Markets witnessed further consolidation. Sensex closed at 73,895.74, -0.54% WTD, Nifty 50 at 23,140.50, -0.88% WTD, Nifty Next 50 at 71,778.65, -0.34% WTD, and Nifty Midcap 150 at 22,437.00, -2.03% WTD. Smallcap 250 held relatively better at -0.70% WTD. Valuations touched fresh year-lows Sensex P/E at 19.62x and Nifty 50 at 19.56x presenting a potentially attractive entry zone for long-term investors.
2. **Sectoral Performance-** Sectoral performance was mixed with defensive sectors leading. Realty 2.98%, Pharma 1.10%, and FMCG 1.04% were the top gainers, reflecting a rotation into defensives. On the downside, IT -2.40% led losses, followed by Services -1.53% and Financial Services -1.51%, continuing the pressure on rate-sensitive and growth sectors.
3. **Commodities & Currency-** Brent Crude eased to \$94.61/barrel -7.16% WoW from \$101.91, offering some relief after two weeks above \$100 a modest positive for India's import bill. Gold softened -1.46% WoW to ₹1,50,944/10g and Silver -2.55% WoW to ₹2,31,018/kg as safe-haven demand moderated. The Rupee was broadly stable at ₹95.89/USD, 0.11% WoW. GBP/INR and EUR/INR eased marginally to ₹126.83, -0.98% and ₹109.16, -0.75% respectively.
4. **Money Market & RBI Policy Rates-** The 10-year G-Sec yield rose further to 7.17% from 7.08% last week and 7.04% two weeks ago a 13 bps rise over the fortnight extending its upward run, driven by persistent inflation and crude-related pressures. Call Money edged up to 5.20% from 5.09%, and Treasury Bills rose to 5.39% from 5.28%.
5. **Global Equity Market-** Global markets were broadly positive this week. Nikkei 225 led gains at 2.07% WoW, followed by NASDAQ 1.97% and KOSPI 2.71%. CAC 40 and Shanghai Composite were marginally negative at -0.11% and -0.60% respectively.
6. **Macro Indicator-** CPI rose to 4.82% YoY in August from 4.45% in July the fifth consecutive monthly increase signalling broadening retail price pressures. WPI also ticked up to 9.92% in August from 9.78% in July. PMI held at 54.3 in August, unchanged from the prior reading, remaining in expansion territory and indicating stable manufacturing momentum heading into Q3.

Indian Equity Market

Indicies	25-Sept-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	73895.74	-0.54	-3.98	-13.32	-8.95	3.83
Nifty 50 Index	23140.50	-0.88	-3.90	-11.59	-6.95	6.68
Nifty Next 50 Index	71778.65	-0.34	-2.69	3.24	4.68	17.46
Nifty Midcap 150 Index	22437.00	-2.03	-4.67	0.51	5.03	15.15
Nifty Smallcap 250 Index	18158.90	-0.70	-1.16	8.68	6.39	15.35
Nifty 500 Index	22603.50	-1.04	-3.61	-5.48	-1.81	10.37

P/E

Indicies	25-Sept-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	19.62	23.70 - 19.50	-0.12	3,766
Nifty 50 Index	19.56	22.92 - 19.50	-0.10	1,183
Nifty Next 50 Index	18.97	21.15 - 17.09	-0.09	3,784
Nifty Midcap 150 Index	28.06	34.83- 27.81	-0.14	800
Nifty Smallcap 250 Index	33.51	36.42 - 23.43	0.17	542
Nifty 500 Index	21.90	24.91 - 20.96	-0.07	1,032

Sectoral Indices

Indicies	25-Sept-26	18-Sept-26	WOW%
Nifty Realty	869.35	844.20	2.98
Nifty Pharma	27003.00	26710.10	1.10
Nifty FMCG	45941.30	45466.80	1.04
Nifty Metal	13087.15	13052.60	0.26
Nifty Media	1550.65	1553.75	-0.20
Nifty PSE	9572.85	9597.00	-0.25
Nifty Commodities	9540.75	9566.55	-0.27
Nifty PSU	8294.50	8317.55	-0.28
Nifty Auto	26967.90	27129.00	-0.59
Nifty Oil & Gas	10862.15	10948.70	-0.79
Nifty Bank	55580.40	56358.70	-1.38
Nifty Private Bank	26883.20	27290.00	-1.49
Nifty Financial Services 25/50	27137.30	27552.00	-1.51
Nifty Services	29613.95	30073.10	-1.53
Nifty IT	28160.90	28854.55	-2.40

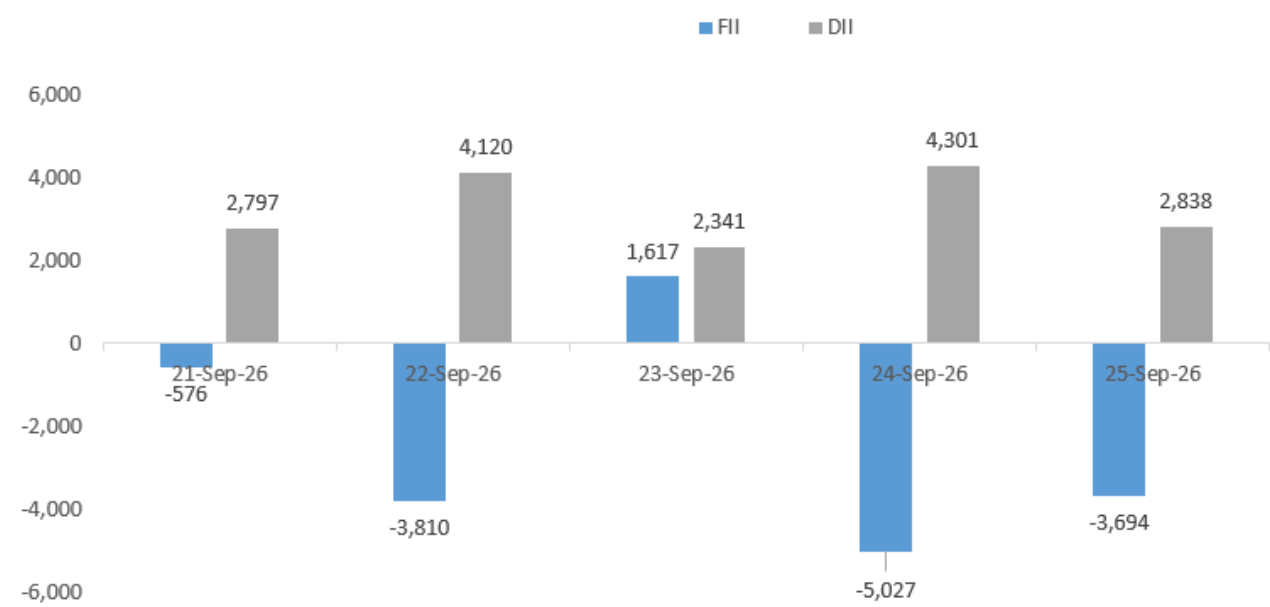
Commodity & Currency

Commodities	25-Sept-26	18-Sept-26	WOW%
Gold (₹/10 g)	150,944.00	153,176.00	-1.46
Silver(₹/1 Kg)	231,018.00	237,062.00	-2.55
Brent Crude Oil (\$/Barrel)	94.61	101.91	-7.16
GBP/INR	126.83	128.09	-0.98
EUR/INR	109.16	109.99	-0.75
USD/INR	95.89	95.79	0.11

Global Equity Markets

Country	Global Performances	25-Sept-26	18-Sept-26	WOW%	YOY%
South Korea	KOSPI	7,080.92	6,894.23	2.71	104.00
Japan	Nikkei 225	66,364.20	65,018.95	2.07	45.04
United States	NASDAQ composite	26,939.37	26,418.30	1.97	20.35
MSCI Emerging	MSCI Emerging Markets Index	1,734.61	1,710.02	1.44	28.97
MSCI World	MSCI World Index	4,942.31	4,911.08	0.64	16.23
Germany	DAX	25,396.92	25,304.06	0.37	7.91
United Kingdom	FTSE 100	10,707.24	10,697.57	0.09	16.04
France	CAC 40	8,077.80	8,086.42	-0.11	3.85
China	Shanghai Composite	3,888.37	3,911.87	-0.60	0.91

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	25-Sept-26	18-Sept-26	11-Sept-26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.20%	5.09%	5.02%
Treasury Bills	5.39%	5.28%	5.21%
G-Sec (10 yr)	7.17%	7.08%	7.04%

Top 5 Gainers

S.No	Top Gainers	25-Sept-26	18-Sept-26	WOW%
1	Protean eGov Technologies Ltd	689.90	490.05	40.78
2	Whirlpool of India Ltd	918.90	717.70	28.03
3	Engineers India Ltd.	315.65	266.35	18.51
4	Carborundum Universal Ltd	1,278.50	1,124.40	13.71
5	Sun TV Network Ltd	513.20	451.70	13.62

Top 5 Losers

S.No	Top Losers	25-Sept-26	18-Sept-26	WOW%
1	PB Fintech Ltd	1,166.00	1743.00	-33.10
2	Prudent Corporate Advisory Services Ltd	3097.90	3501.60	-11.53
3	Home First Finance Company India Ltd	1,123.10	1,241.30	-9.52
4	L&T Finance Ltd	284.00	312.80	-9.21
5	Aegis Vopak Terminals Ltd	287.50	314.95	-8.72

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