Weekly Market Monitor
26 June 2026

BiggPocket WEALTH MANAGEMENT

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

Market Overview

The Indian equity market posted modest gains this week, with Sensex rising 0.39% to 77,100 and Nifty 50 advancing 0.18% to 24,056, supported by continued monthly recovery. Broader markets remained resilient, with Smallcap 250 and Nifty Next 50 outperforming large caps, reflecting sustained investor interest. Valuations for benchmark indices remained near the lower end of their 52-week range (~21x), while broader markets continued to trade at relatively higher levels. Sectoral gains were led by Pharma (+2.08%), Realty (+1.77%), Private Banks (+1.54%), and Auto (+1.48%), while Metals and PSU-related sectors witnessed profit booking. Liquidity conditions remained stable, with the 10-year G-Sec yield easing to 6.80%, while Brent crude declined sharply to $70.34 per barrel, easing inflation concerns and supporting the macroeconomic outlook despite mixed global market performance.

Weekly Market Review & Key Highlights
26 June 2026

Indian Equity Market

1. **Market Performance** Indian markets posted modest weekly gains with BSE Sensex closing at 77,100 (+0.39% WTD) and Nifty 50 at 24,056 (+0.18% WTD), supported by a +3.11% and +2.16% monthly recovery respectively. However, calendar year losses remain steep at –9.57% for Sensex and –8.09% for Nifty 50. Broader markets showed resilience — Smallcap 250 is the CYTD outperformer at +5.96%, followed by Nifty Next 50 at +3.85%, while large-caps continue to lag. Valuations are near multi-year lows with Sensex P/E at 21.33x and Nifty 50 P/E at 20.75x, hovering close to their 52-week lows of 20.15x and 20.06x respectively, suggesting an attractive zone for long-term investors.
2. **Sectoral Performance** - Pharma led the sectoral recovery this week with a gain of +2.08%, followed by Realty (+1.77%), Private Bank (+1.54%), and Auto (+1.48%), reflecting renewed buying interest in defensive and consumption-oriented sectors. Financial Services and Banking indices also posted modest gains. On the downside, Metal was the biggest laggard at –4.42%, followed by PSE (–2.21%), Commodities (–2.00%), and PSU Bank (–0.92%). IT slipped –0.35% WTD, continuing to underperform amid global tech sentiment headwinds.
3. **Commodities & Currency** - Brent Crude Oil declined sharply by 8.17% WoW to $70.34/barrel, driven by easing geopolitical tensions and reduced supply-risk premiums a significant positive for India's current account deficit and imported inflation. Gold fell 3.29% WoW to ₹1,39,843/10g and Silver dropped 5.67% WoW to ₹2,18,680/kg as safe-haven demand faded with improving global sentiment. On the currency front, the Indian Rupee remained broadly stable at ₹94.48/USD (+0.007% WoW), while GBP/INR and EUR/INR softened marginally, reflecting mild USD strength globally.
4. **Money Market & RBI Policy Rates** The 10-year G-Sec yield continued its easing trend, declining to 6.80% this week from 6.85% last week and 6.92% two weeks ago, reflecting softening long-end rate expectations as inflation risks moderate. Call Money edged marginally higher to 5.38% while Treasury Bills eased slightly to 5.25%, indicating broadly stable short-term liquidity conditions in the market.
5. **Global Equity -** Global markets delivered a mixed performance for the week. FTSE 100 was the top weekly gainer at +0.86%, while KOSPI fell the most at –7.08% WoW, followed by NASDAQ (–4.37%) and MSCI Emerging Markets (–4.37%). Nikkei 225 also declined –2.59% WoW and MSCI World slipped –1.74%.

Indian Equity Market

Indicies	25-Jun-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	77100.47	0.39	3.11	-9.57	-7.95	6.98
Nifty 50 Index	24056.00	0.18	2.16	-8.09	-3.51	10.10
Nifty Next 50 Index	72199.55	-0.22	1.58	3.85	7.72	19.96
Nifty Midcap 150 Index	22751.05	-0.97	0.80	1.91	5.79	21.00
Nifty Smallcap 250 Index	17704.70	-0.05	4.19	5.96	2.02	20.34
Nifty 500 Index	23113.70	-0.13	2.02	-3.35	0.23	14.10

P/E

Indicies	25-Jun-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	21.33	23.60 - 20.15	-0.11	3,615
Nifty 50 Index	20.75	23.04 - 20.06	-0.10	1,159
Nifty Next 50 Index	18.78	22.16 - 17.09	-0.15	3,844
Nifty Midcap 150 Index	29.11	35.30- 27.81	-0.16	782
Nifty Smallcap 250 Index	35.05	35.34 - 23.43	0.05	505
Nifty 500 Index	22.80	25.34 - 20.96	-0.10	1,014

Sectoral Indices

Indicies	25-Jun-26	19-Jun-26	WOW%
Nifty Pharma	24,969.50	24,460.30	2.08
Nifty Realty	826.25	811.90	1.77
Nifty Private Bank	28,322.60	27,892.05	1.54
Nifty Auto	26,977.75	26,583.35	1.48
Nifty Financial Services 25/50	29,038.15	28,737.80	1.05
Nifty Bank	58,177.05	57,685.75	0.85
Nifty Services	30,697.25	30,562.70	0.44
Nifty Oil & Gas	11,143.30	11,169.75	-0.24
Nifty FMCG	49,419.25	49,558.70	-0.28
Nifty IT	27,330.85	27,426.85	-0.35
Nifty Media	1,509.80	1,515.40	-0.37
Nifty PSU	8,636.10	8,716.50	-0.92
Nifty Commodities	9,855.00	10,055.80	-2.00
Nifty PSE	9,954.00	10,178.50	-2.21
Nifty Metal	12,445.65	13,020.80	-4.42

Commodity & Currency

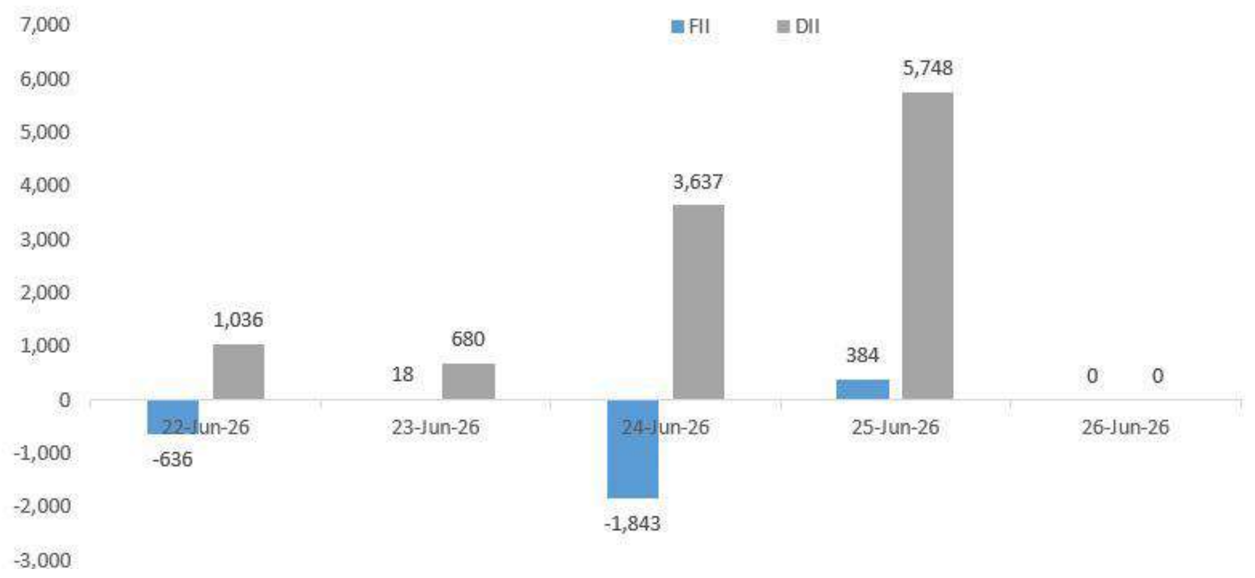
Commodities	25-Jun-26	19-Jun-26	WOW%
Gold (₹/10 g)	139,843.00	144,606.00	-3.29
Silver((₹/1 Kg)	218,680.00	231,829.00	-5.67
Brent Crude Oil ($/Barrel)	70.34	76.60	-8.17
GBP/INR	124.50	124.60	-0.08
EUR/INR	107.36	108.03	-0.61
USD/INR	94.48	94.47	0.01

Global Equity Markets

Country	Global Performances	26-Jun-26	19-Jun-26	WOW%	YOY%
United Kingdom	FTSE 100	10,452.41	10,363.27	0.86	19.67
France	CAC 40	8,384.20	8,421.14	-0.44	10.94
Germany	DAX	24,691.06	25,043.00	-1.41	4.44
China	Shanghai Composite	4,027.26	4,090.48	-1.55	16.78
MSCI World	MSCI World Index	4,743.79	4,827.55	-1.74	19.06
Japan	Nikkei 225	69,408.00	71,250.06	-2.59	75.34
MSCI Emerging	MSCI Emerging Markets Index	1,705.03	1,782.97	-4.37	38.98
United States	NASDAQ composite	25,358.60	26,517.93	-4.37	25.74
South Korea	KOSPI	8,411.21	9,052.42	-7.08	173.13

...Badho, Befikar

FII VS DII



Macro Indicators

Indicators	May'26	Apr'26	Mar'26	Feb'26
CPI % YOY	3.93	3.48	3.40	3.21
WPI% YOY	9.68	8.30	3.88	2.13
IIP% YOY	N.A	4.90	4.10	5.20
PMI	59.3	58.2	57.00	58.10

Debt

Money Market			
Liquidity Indicators	25-Jun-26	19-Jun-26	12-Jun-26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.38%	5.36%	5.27%
Treasury Bills	5.25%	5.26%	5.30%
G-Sec (10 yr)	6.80%	6.85%	6.92%

Top 5 Gainers

S.No	Top Gainers	25-Jun-26	19-Jun-26	WOW%
1	Kirloskar Oil Engines Ltd	2,484.30	1,991.50	24.75
2	Oracle Fin Serv	10,974.50	9,638.50	13.86
3	Aegis Logistics Ltd	1140.65	1007.80	13.18
4	Cohance Lifesciences Limited	458.05	405.85	12.86
5	M&M Financial	328.55	294.10	11.71

Top 5 Losers

S.No	Top Gainers	25-Jun-26	19-Jun-26	WOW%
1	Paras Defence and Space Technologies Ltd	1233.75	1408.65	-12.42
2	National Aluminium	332.15	376.00	-11.66
3	Apollo Micro Systems Ltd	384.40	433.15	-11.25
4	CSB Bank Ltd	324.60	365.50	-11.19
5	Vedanta Ltd	273.45	300.80	-9.09