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

Market Overview

The Indian equity market extended its losing streak for the fourth consecutive week, with Sensex declining 0.97% to 76,515 and Nifty 50 falling 1.15% to 23,898. Broader markets remained relatively resilient, while benchmark valuations eased to ~20x, nearing their 52-week lows and supporting the long-term entry case. Sectoral performance was largely negative, with Oil & Gas (+1.08%) and Private Banks (+0.31%) among the few gainers, while Auto, Media, and IT led the declines. Brent crude surged 9.30% to $91.30/barrel, reviving inflation and import-cost concerns, though the Rupee strengthened to ₹94.49/USD. Meanwhile, the 10-year G-Sec yield rose to 6.97% amid higher crude prices and persistent wholesale price pressures, keeping market sentiment cautious.

Weekly Market Review & Key Highlights
04 September 2026

Indian Equity Market

1. **Indian Equity Markets -** Markets extended their losing streak for the fourth consecutive week, with BSE Sensex closing at 76,515.43, -0.97% WTD and Nifty 50 at 23,897.70 -1.15% WTD. Broader markets showed relative resilience Smallcap 250 was nearly flat -0.08% WTD while Midcap 150 slipped -1.44% WTD. Valuations contracted to Sensex P/E 20.20x and Nifty 50 at 20.20x both now approaching their 52-week lows of 19.80x and 19.62x respectively, reinforcing the long-term entry case for patient investors.
2. **Sectoral Performance-** Sectoral performance was broadly negative this week with limited pockets of strength. Oil & Gas 1.08% was the standout gainer Private Bank 0.31% and PSE 0.22% managed marginal gains. All other sectors declined Auto led losses at -3.95%, followed by Media -2.34% and IT -1.88% unwinding last week's gains in export-oriented and cyclical names.
3. **Commodities & Currency Gold fell sharply-** -2.79% WoW to ₹1,54,425/10g and Silver declined -3.41% WoW to ₹2,35,557/kg, as safe-haven demand moderated on improved global risk sentiment. Brent Crude surged 9.30% WoW to $91.30/barrel a significant reversal from last week's easing reviving concerns around India's import bill and inflation trajectory. The Rupee strengthened notably to ₹94.49/USD, -1.12% WoW its best weekly performance in months. GBP/INR and EUR/INR also softened to ₹127.97 -1.48% and ₹109.88, -1.27% respectively, reflecting broad USD weakness.
4. **Money Market & RBI Policy Rates-** The 10-year G-Sec yield rose further to 6.97% from 6.92% last week and 6.88% two weeks ago a 9 bps rise continuing the upward trend likely reflecting the sharp crude oil surge and persistent wholesale price pressures. Call Money eased to 4.94% from 5.22%, pointing to improved short-term liquidity. Treasury Bills were broadly stable at 5.25%.
5. **Global Equity Markets-** Global markets were broadly negative this week. NASDAQ managed a marginal gain of 0.69% WoW, followed by MSCI Emerging Markets 0.20% and FTSE 100 0.15%. MSCI World was nearly flat at 0.02%. On the downside, Nikkei 225 fell -2.04%, DAX -1.73% and KOSPI -1.50%, CAC 40 -1.41%, and Shanghai Composite -0.56%. On a YoY basis, KOSPI 108.92% and Nikkei 52.73% remain global standouts, while India's Nifty 50 is at -2.35% YoY, reflecting continued domestic large-cap underperformance.
6. **Macro Indicators-** IIP for July improved to 6.70% YoY from 7.30% in June and 5.10% in May, indicating sustained but moderating industrial activity. The sharp rebound in Brent Crude to $91.30/barrel this week is a near-term upside risk to both CPI and WPI for August.

Indian Equity Market

Indicies	04-Sept-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	76515.43	-0.97	-0.57	-10.25	-5.21	5.25
Nifty 50 Index	23897.70	-1.15	-0.76	-8.69	-2.35	8.35
Nifty Next 50 Index	72880.90	-1.72	-1.19	4.83	9.27	18.69
Nifty Midcap 150 Index	23168.35	-1.44	-1.57	3.78	9.73	16.85
Nifty Smallcap 250 Index	18481.40	-0.08	0.59	10.61	9.25	16.04
Nifty 500 Index	23254.15	-1.17	-0.84	-2.76	2.63	11.91

P/E

Indicies	04-Sept-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.27	23.70 - 19.80	-0.10	3,788
Nifty 50 Index	20.20	22.92 - 19.62	-0.06	1,183
Nifty Next 50 Index	19.27	21.64 - 17.09	-0.06	3,782
Nifty Midcap 150 Index	28.97	34.83- 27.81	-0.10	800
Nifty Smallcap 250 Index	34.10	36.42 - 23.43	0.08	542
Nifty 500 Index	22.53	24.91 - 20.96	-0.01	1,032

Sectoral Indices

Indicies	04-Sept-26	28-Aug-26	WOW%
Nifty Oil & Gas	11187.65	11067.70	1.08
Nifty Private Bank	27824.50	27737.20	0.31
Nifty PSE	9710.15	9689.25	0.22
Nifty Commodities	9803.85	9809.15	-0.05
Nifty Realty	907.90	908.85	-0.10
Nifty Bank	57369.65	57496.30	-0.22
Nifty Financial Services 25/50	28217.10	28463.50	-0.87
Nifty PSU	8514.85	8604.30	-1.04
Nifty Services	30575.55	30900.20	-1.05
Nifty Metal	13317.45	13525.35	-1.54
Nifty IT	30695.10	31281.70	-1.88
Nifty Pharma	26478.10	26991.85	-1.90
Nifty FMCG	45892.75	46815.00	-1.97
Nifty Media	1565.45	1602.90	-2.34
Nifty Auto	27710.90	28851.80	-3.95

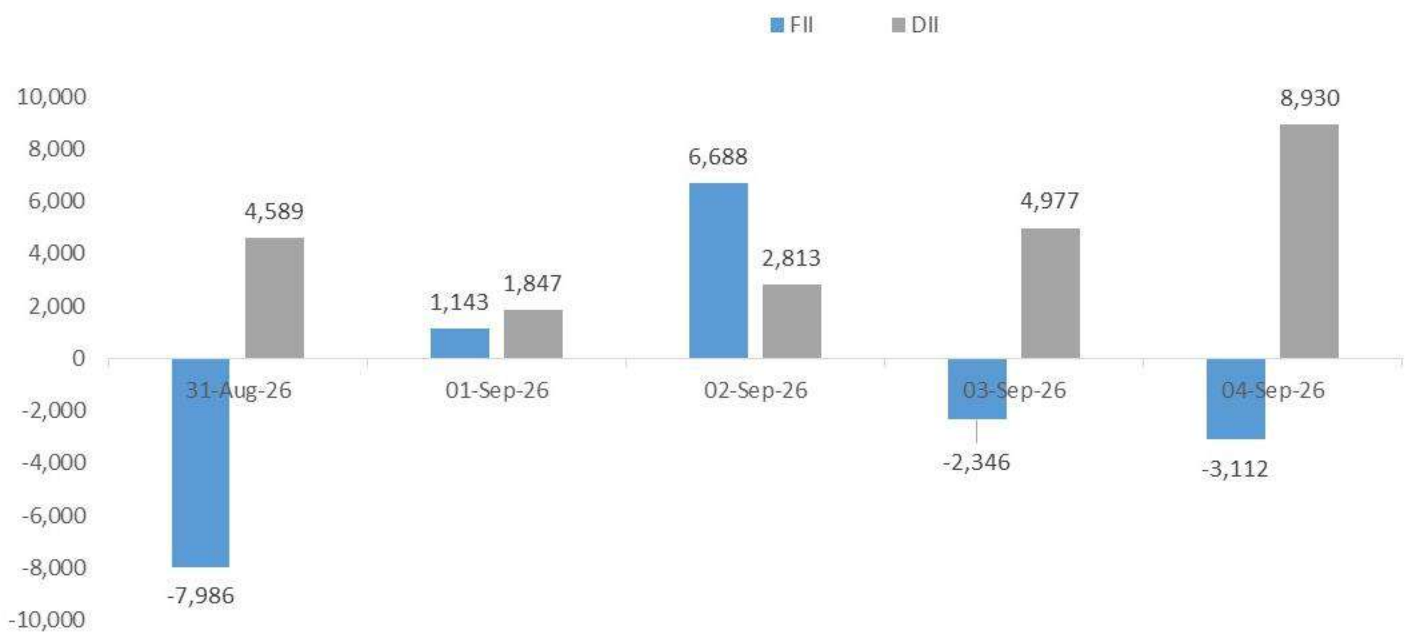
Commodity & Currency

Commodities	04-Sept-26	28-Aug-26	WOW%
Gold (₹/10 g)	154,425.00	158,854.00	-2.79
Silver((₹/1 Kg)	235,557.00	243,862.00	-3.41
Brent Crude Oil ($/Barrel)	91.30	83.53	9.30
GBP/INR	127.97	129.89	-1.48
EUR/INR	109.88	111.30	-1.27
USD/INR	94.49	95.56	-1.12

Global Equity Markets

Country	Global Performances	04-Sept-26	28-Aug-26	WOW%	YOY%
United States	**NASDAQ composite**	26,584.06	26,402.42	0.69	22.46
MSCI Emerging	**MSCI Emerging Markets Index**	1,726.61	1,723.18	0.20	36.86
United Kingdom	**FTSE 100**	10,831.22	10,815.26	0.15	17.51
MSCI World	**MSCI World Index**	5,000.35	4,999.33	0.02	19.03
China	**Shanghai Composite**	3,930.12	3,952.18	-0.56	4.36
France	**CAC 40**	8,278.29	8,396.56	-1.41	7.52
South Korea	**KOSPI**	6,687.21	6,788.88	-1.50	108.92
Germany	**DAX**	26,059.35	26,517.64	-1.73	9.62
Japan	**Nikkei 225**	65,034.00	66,385.00	-2.04	52.73

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	6.70	7.30	5.10	4.90
PMI	53.30	57.10	59.30	58.20

Debt

Money Market			
Liquidity Indicators	**04-Sept-26**	**28-Aug-26**	**21-Aug-26**
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	4.94%	5.22%	5.19%
Treasury Bills	5.25%	5.26%	5.26%
G-Sec (10 yr)	6.97%	6.92%	6.88%

Top 5 Gainers

S.No	Top Gainers	04-Sept-26	28-Aug-26	WOW%
1	**New India Assurance Company Ltd**	231.50	186.34	24.24
2	**Welspun Enterprises Ltd**	818.70	670.30	22.14
3	**SML Mahindra Ltd**	6,298.50	5,186.50	21.44
4	**Raymond**	740.00	626.85	18.05
5	**Caplin Point Laboratories Ltd**	2,794.00	2,517.20	11.00

Top 5 Losers

S.No	Top Gainers	04-Sept-26	28-Aug-26	WOW%
1	**R R Kabel Ltd**	2,458.20	2905.20	-15.39
2	**KEI Industries**	4860.00	5570.00	-12.75
3	**Adani Energy Solutions**	1408.00	1581.40	-10.96
4	**Power Mech Projects Ltd**	2,336.00	2,580.60	-9.48
5	**Kaynes Technology India Ltd**	3605.00	3,943.10	-8.57

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