

Weekly Market Monitor
09 October 2026

BiggPocket WEALTH MANAGEMENT

BiggPocket Fintech Private Limited

ARN No. - 325081 | APRN No. - APRN05683

Market Overview

The Indian equity market staged a partial recovery, with Sensex rising 0.78% to 72,472 and Nifty 50 gaining 0.44% to 22,520, while broader markets remained marginally negative. Valuations improved slightly but stayed near multi-year lows at around 19.2x P/E. Sectoral gains were led by FMCG, PSU and Private Banks, while Realty and Metals remained under pressure. Brent crude rose 1.18% to $91.49/barrel, keeping import costs elevated, while the Rupee weakened to ₹96.61/USD. The RBI raised the repo rate to 5.50%, while the 10-year G-Sec yield climbed to 7.32%, reflecting persistent inflation concerns. Global markets were mixed, though Indian equities remained under pressure on a year-to-date basis. Meanwhile, PMI rebounded to 55.9 in September, signalling stronger manufacturing momentum.

Weekly Market Review & Key Highlights
09 October 2026

Indian Equity Market

1. **Indian Equity Markets-** Markets witnessed a partial recovery. Sensex closed at 72,472.33 0.78% WTD, Nifty 50 at 22,520.45 0.44% WTD, while Nifty Next 50 -1.18% WTD, Nifty Midcap 150 -0.19% WTD, and Smallcap 250 -0.08% WTD remained marginally negative indicating the recovery was largely large-cap driven. CYTD losses remain deep at -14.99% for Sensex and -13.96% for Nifty 50. Valuations recovered slightly Sensex P/E at 19.22x and Nifty 50 at 19.27x still near multi-year lows, keeping the long-term entry case intact.
2. **Sectoral Performance-** Sectoral performance turned selectively positive, led by FMCG 2.45%, PSU 2.38% and Private Bank 1.97% a rotation back into rate-sensitive and consumption names. On the downside, Realty -3.72%, Metal -3.69% and Commodities -2.27% continued to underperform.
3. **Commodities & Currency-** Gold edged up 0.77% WoW to ₹1,48,909/10g, maintaining its upward bias. Silver was broadly flat at -0.11% WoW (₹2,21,191/kg). Brent Crude inched up 1.18% WoW to $91.49/barrel, continuing to keep India's import bill elevated. The Rupee weakened marginally to ₹96.61/USD ,0.65% WoW. GBP/INR firmed to ₹127.89, 0.52% WoW while EUR/INR was nearly flat at ₹108.47, -0.14% WoW.
4. **Money Market & RBI Policy Rates-** In a significant policy move, the RBI raised the Repo Rate to 5.50% from 5.25% the first hike signalling a shift toward addressing persistent inflation. The 10-year G-Sec yield rose further to 7.32% from 7.23% last week and 7.17% two weeks ago a 15 bps rise over the fortnight. Call Money edged up to 5.31% from 5.08%, and Treasury Bills climbed to 5.57% from 5.52%. Reverse Repo remains unchanged at 3.35%.
5. **Global Equity Markets-** Global markets were mixed this week. Nikkei 225 led at 1.06% WoW, followed by FTSE 100 0.86% and NASDAQ 0.64%. MSCI Emerging Markets was nearly flat at –0.05%. On the downside, KOSPI fell sharply -5.39%, DAX -0.55% and Shanghai Composite -0.74%. On a YoY basis, KOSPI 86.69% and Nikkei 42.10% remain global outperformers, while India's Nifty 50 is at -9.59% YoY.
6. **Macro Indicators-** PMI rebounded to 55.9 in September from 54.3 in August the strongest reading since May '26 signalling a meaningful recovery in manufacturing momentum and a constructive signal for industrial output ahead.

Indian Equity Market

Indices	09-Oct-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	72472.33	0.78	-0.01	-14.99	-11.80	3.42
Nifty 50 Index	22520.45	0.44	-0.44	-13.96	-9.59	6.13
Nifty Next 50 Index	68166.70	-1.18	-2.27	-1.95	0.39	16.33
Nifty Midcap 150 Index	21603.25	-0.19	-1.21	-3.23	0.37	13.94
Nifty Smallcap 250 Index	17574.85	-0.08	-1.26	5.18	3.93	13.86
Nifty 500 Index	21866.65	0.04	-0.93	-8.56	-5.06	9.52

P/E

Indices	09-Oct-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	19.22	23.70 - 19.01	-0.14	3,771
Nifty 50 Index	19.27	22.92 - 19.02	-0.11	1,169
Nifty Next 50 Index	17.86	21.15 - 17.72	-0.14	3,817
Nifty Midcap 150 Index	28.05	34.83- 27.67	-0.14	770
Nifty Smallcap 250 Index	34.03	36.42 - 23.43	0.19	516
Nifty 500 Index	21.56	24.91 - 20.96	-0.08	1,014

Sectoral Indices

Indices	09-Oct-26	01-Oct-26	WOW%
Nifty FMCG	44864.25	43789.85	2.45
Nifty PSU	8126.35	7937.80	2.38
Nifty Private Bank	27222.55	26697.25	1.97
Nifty Bank	55256.65	54450.75	1.48
Nifty Financial Services 25/50	26822.05	26434.75	1.47
Nifty IT	28574.90	28304.70	0.95
Nifty Services	29090.70	28957.90	0.46
Nifty Media	1553.30	1546.30	0.45
Nifty Oil & Gas	10345.30	10474.85	-1.24
Nifty Pharma	25962.05	26311.55	-1.33
Nifty PSE	9077.75	9208.65	-1.42
Nifty Auto	24859.90	25384.95	-2.07
Nifty Commodities	8923.40	9130.25	-2.27
Nifty Metal	12000.75	12460.70	-3.69
Nifty Realty	803.95	835.00	-3.72

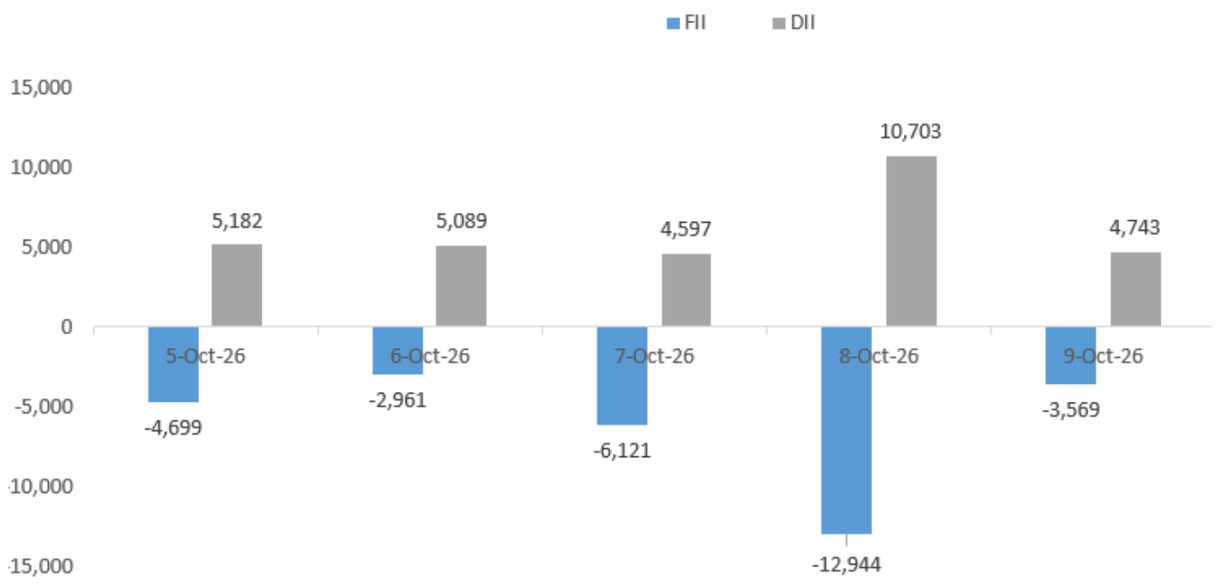
Commodity & Currency

Commodities	09-Oct-26	01-Oct-26	WOW%
Gold (₹/10 g)	148,909.00	147,770.00	0.77
Silver(₹/1 Kg)	221,191.00	221,443.00	-0.11
Brent Crude Oil ($/Barrel)	91.49	90.42	1.18
GBP/INR	127.89	127.22	0.52
EUR/INR	108.47	108.62	-0.14
USD/INR	96.61	95.99	0.65

Global Equity Markets

Country	Global Performances	09-Oct-26	02-Oct-26	WOW%	YOY%
Japan	Nikkei 225	69,030.92	68,309.46	1.06	42.10
United Kingdom	FTSE 100	10,552.05	10,461.95	0.86	10.96
United States	NASDAQ composite	27,366.17	27,190.86	0.64	23.25
MSCI World	MSCI World Index	4,962.41	4,931.54	0.63	17.10
MSCI Emerging	MSCI Emerging Markets Index	1,708.77	1,709.57	-0.05	25.12
Germany	DAX	25,087.27	25,225.94	-0.55	2.01
China	Shanghai Composite	3,813.79	3,842.19	-0.74	-3.06
France	CAC 40	7,803.33	7,911.98	-1.37	-2.96
South Korea	KOSPI	6,625.93	7,003.74	-5.39	86.69

FII VS DII



Macro Indicators

Indicators	Sept'26	Aug'26	Jul'26	Jun'26
CPI % YOY	N.A	4.82	4.45	4.38
WPI% YOY	N.A	9.92	9.78	9.87
IIP% YOY	N.A	8.00	6.70	7.30
PMI	55.90	54.30	53.30	57.10

Debt

Money Market			
Liquidity Indicators	**09-Oct-26**	**01-Oct-26**	**25-Sept-26**
Repo Rate	5.50%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.31%	5.08%	5.20%
Treasury Bills	5.57%	5.52%	5.39%
G-Sec (10 yr)	7.32%	7.23%	7.17%

Top 5 Gainers

S.No	Top Gainers	09-Oct-26	01-Oct-26	WOW%
1	**Physicswallah Ltd**	143.69	120.17	19.57
2	**Sky Gold and Diamonds Ltd**	921.00	810.65	13.61
3	**Trent**	2,918.20	2,580.00	13.11
4	**Black Box Ltd**	892.10	795.85	12.09
5	**PTC Industries**	24,535.00	22,025.00	11.40

Top 5 Losers

S.No	Top Losers	09-Oct-26	01-Oct-26	WOW%
1	**Jeena Sikho Lifecare Ltd**	385.15	480.80	-19.89
2	**Aarti Pharmalabs Ltd**	855.50	968.50	-11.67
3	**Bandhan Bank Ltd**	157.00	176.00	-10.80
4	**GMM Pfaudler Ltd**	1,299.80	1,443.40	-9.95
5	**The Bombay Burmah Trading Corporation Limited**	1222.10	1,334.20	-8.40

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