

Market Overview

Indian Markets — Red across the board. Sensex (73,583) and Nifty 50 (22,820) both down ~1.3% this week and ~13% YTD. Valuations near 52-week lows — market entering value zone. Sectors — IT & Pharma the only green sectors. PSU Banks, Realty, and Metals took the biggest hit. Movers — HEG Ltd (+16.8%) top gainer; JSW Holdings (–19.5%) biggest loser of the week. Commodities & Currency — Gold, Silver, and Crude all fell 2–4%. Rupee slipped to 94.60/USD — weakest in recent weeks. Mutual Funds — All categories in the green: Large Cap +2.45% | Mid Cap +2.1% | Small Cap +1.85% (weekly). Global Markets — Largely negative. KOSPI worst performer (–5.92%). Only France's CAC 40 and Japan bucked the trend. Macro — Inflation ticking up (CPI 3.21%), but PMI at 58.1 shows manufacturing stays strong. RBI holds Repo at 5.25%; bond yields rising to 7.01%.

Indian Equity Market

Indices	27 Mar '26	WTD%	MTD%	CYTD%	1Yr%	3Yrs%
BSE Sensex	73583.22	-1.27	-9.48	-13.69	-5.18	8.53
Nifty 50 Index	22819.60	-1.28	-9.37	-12.81	-2.19	11.63
Nifty Next 50 Index	62043.05	-2.85	-11.00	-10.76	-1.25	19.37
Nifty Midcap 150 Index	19952.75	-1.36	-8.67	-10.62	4.72	22.31
Nifty Smallcap 250 Index	14655.35	-0.92	-7.72	-12.29	-2.47	20.27
Nifty 500 Index	21020.15	-1.44	-9.27	-12.10	-0.87	14.90

P/E

Indices	27 Mar '26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.22	26.04-20.22	-0.07	3,639
Nifty 50 Index	19.97	23.04 - 19.63	-0.05	1,143
Nifty Next 50 Index	17.34	22.72 - 17.34	-0.23	3,578
Nifty Midcap 150 Index	29.73	36.57 - 29.73	-0.18	671
Nifty Smallcap 250 Index	24.12	34.2 - 24.12	-0.16	608
Nifty 500 Index	21.32	25.34 - 21.32	-0.09	986

Sectoral Indices

Index	23-Mar'26	27-Mar'26	WOW%
Nifty IT	29,199.60	29,541.65	1.17
Nifty Pharma	22,540.70	22,565.60	0.11
Nifty Media	1,305.10	1,294.20	-0.84
Nifty Services	29,475.65	29,158.00	-1.08
Nifty Private Bank	25,267.65	24,986.70	-1.11
Nifty FMCG	47,007.55	46,427.20	-1.23
Nifty Auto	24,715.90	24,351.95	-1.47
Nifty Commodities	9,390.50	9,223.85	-1.77
Nifty Oil & Gas	11,034.95	10,830.40	-1.85
Nifty Financial Services 25/50	27,131.85	26,609.70	-1.92
Nifty PSE	9,882.00	9,676.40	-2.08
Nifty Bank	53,427.05	52,274.60	-2.16
Nifty Metal	11,412.75	11,161.65	-2.20
Nifty Realty	696.40	670.15	-3.77
Nifty PSU	8,584.60	8,249.45	-3.90

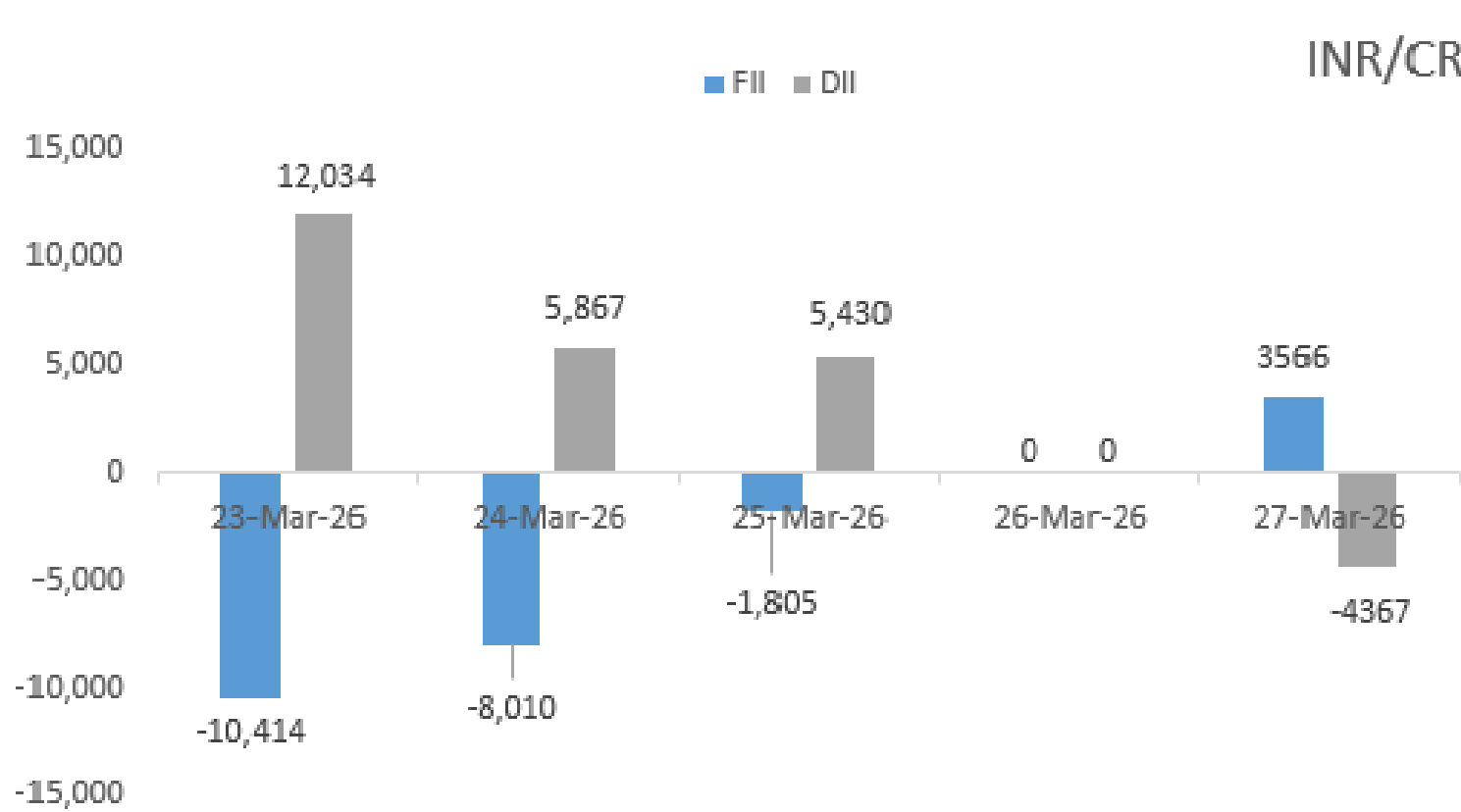
Commodity & Currency

Commodities	23-Mar'26	27-Mar'26	WOW%
Gold (₹/10 g)	146,640.00	142,344.00	-2.93
Silver((₹/1 Kg)	230,503.00	221,711.00	-3.81
Brent Crude Oil (\$/Barrel)	96.14	94.48	-1.73
GBP/INR	125.16	126.20	0.83
EUR/INR	107.94	109.16	1.13
USD/INR	93.35	94.60	1.34

Global Equity Markets

Country	Global Performances	23-Mar'26	27-Mar'26	WOW%	YOY%
South Korea	CAC 40	7,665.62	7,763.43	1.28	-3.61
MSCI	Nikkei 225	53,372.53	53,373.07	0.00	41.20
Japan	FTSE 100	9,918.33	9,994.14	0.76	15.08
MSCI	DAX	22,380.19	22,301.27	-0.35	-1.78
USA	MSCI World Index	4,244.24	4,188.08	-1.32	13.31
French	Shanghai Composite	3,957.05	3,913.72	-1.10	16.01
UK	NASDAQ composite	21,647.61	21,408.08	-1.11	17.92
China	MSCI Emerging Markets Index	1,463.75	1,434.80	-1.98	26.90
Germany	KOSPI	5,781.20	5,438.87	-5.92	108.61

FII VS DII



INR/CR

Macro Indicators	Nov'25	Dec'25	Jan'25	Feb'26
CPI % YOY	0.71	1.33	2.75	3.21
WPI% YOY	-0.32	0.83	1.81	2.13
IIP% YOY	6.70	7.80	4.80	N.A
PMI	59.70	57.80	59.50	58.10

Debt

Money Market			
Liquidity Indicators	27 Mar'26	20 March'26	13 March'26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.25%	3.25%	3.25%
Call Money	5.46%	5.33%	5.07%
Treasury Bills	0.00%	5.33%	5.32%
G-Sec (10 yr)	7.01%	6.82%	6.73%

Top 5 **Gainers**

S.No	Top Gainers	23-Mar'26	27-Mar'26	WOW%
1.	HEG Ltd.	490.00	572.30	16.80
2.	Supreme Petrochem Ltd	648.00	755.20	16.54
3.	Affle 3i Ltd	1268.70	1446.10	13.98
4.	Emcure Pharmaceuticals Ltd	1,468.20	1,652.70	12.57
5.	Apar Industries Ltd	9,645.00	10,608.00	9.98

Top 5 **Losers**

S.No	Top Losers	23-Mar'26	27-Mar'26	WOW%
1.	JSW Holdings Ltd	14,700.00	11,838.00	-19.47
2.	Lodha Developers Ltd	787.75	698.85	-11.29
3.	PTC Industries Ltd	17426.35	15,613.75	-10.40
4.	Chennai Petroleum Corporation Ltd	1,064.00	959.75	-9.80
5.	Raymond Lifestyle Ltd	859.00	775.05	-9.77

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