Weekly Market Monitor
12 June 2026

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

Market Overview

The Indian equity market ended the week on a positive note, with Sensex rising 1.73% to 75,528 and Nifty 50 up 1.10% to 23,623, snapping a multi-week losing streak. Gains were concentrated in large-cap financials and PSUs, while broader indices like Nifty Next 50 (–0.26%), Midcap 150 (+0.03%), and Smallcap 250 (+0.14%) stayed flat, showing limited participation. Valuations remain near multi-year lows (Sensex 20.41x, Nifty 20.37x), keeping large caps attractive. Bond yields eased to 6.92% and short-term rates softened, reflecting stable liquidity. Commodities corrected sharply, with Brent crude down 8.65% to \$87.71, gold (–4.28%) and silver (–6.15%) also falling as geopolitical risks eased. INR held steady at 95.38 against USD. Globally, cues were mixed but constructive, with CAC 40 (+1.27%) and NASDAQ (+0.39%) higher, while DAX and Nikkei slipped. CPI rose to 3.93% in May, signalling firming inflation but also sustained manufacturing momentum, supporting earnings recovery prospects.

Weekly Market Review & Key Highlights
12 June 2026

Indian Equity Market

1. **Market Performance** - Indian markets ended the week on a positive note, with benchmark indices recovering meaningfully after weeks of sustained pressure. Sensex closed at ₹75,527.95 (+1.73% WTD) and Nifty 50 at 23,622.90 (+1.10% WTD), snapping a multi-week losing streak. The recovery was largely driven by strong buying in Banking, Financial Services and PSU sectors. However, CYTD losses remain deep — Sensex is still down ~11.41% and Nifty ~9.74% for the calendar year, reflecting the overhang of sustained FII outflows and macro headwinds from the West Asia conflict through much of 2026.
   Broader market showed a divergence — Nifty Next 50 (–0.26%), Midcap 150 (+0.03%) and Small cap 250 (+0.14%) ended largely flat to marginally positive, suggesting the week's recovery was concentrated in large-cap financial and banking heavyweights rather than a broad-based rally.
2. **P/E & Valuations** - Valuations remain near multi-year lows. Sensex P/E is at 20.41x (52W: 26.04–20.15) and Nifty 50 at 20.37x (52W: 23.04–19.62) both hovering near their 52-week P/E lows indicating the large-cap de-rating continues.
3. **Money Market & RBI Monetary Policy** - G-Sec (10yr) yield eased further to 6.92% from 6.98% last week and 7.01% the week prior, signaling softening of long-end rates as inflation risks moderate. Call Money rates declined to 5.27% (from 5.31% last week), and Treasury Bills eased to 5.30% — both indicating improving short-term liquidity conditions. The money market tone turned slightly more accommodative this week.
4. **Commodities & Currency** - Brent Crude fell sharply to \$87.71/barrel — down 8.65% WoW from \$96.02 — its steepest weekly decline in recent months. The fall was driven by ceasefire diplomacy progress in West Asia and a softening of supply-side risk premiums. If sustained below \$90, this would be a significant tailwind for India's Current Account Deficit and could meaningfully ease imported inflation pressure. Gold fell to ₹1,47,367/10g (–4.28% WoW) and Silver to ₹2,41,306/kg (–6.15% WoW), as safe-haven demand faded with improving geopolitical sentiment. USD/INR held stable at ₹95.38 (–0.02% WoW); GBP/INR at ₹127.84 (–0.21%) and EUR/INR at ₹110.36 (–0.42%) — Rupee largely range-bound.
5. **Global Equity Markets** - Global markets were mixed with a slight positive bias. CAC 40 (France) +1.27%, NASDAQ Composite +0.39%, MSCI World +0.21%, KOSPI (–0.45%), Nikkei 225 (–0.85%) and DAX (–0.98%) saw mild weekly declines. Global cues were broadly constructive with crude correction and softening geopolitical tensions supporting risk sentiment, though uncertainty around US rates and trade policy kept upside capped.
6. **Macro Indicators** - CPI for May'26 rose to 3.93% Apr: 3.48% the trend is upward firmly in expansion territory and indicative of sustained manufacturing momentum, providing a constructive backdrop for corporate earnings recovery.

Indian Equity Market

Indicies	12-Jun-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	75527.95	1.73	1.01	-11.41	-7.55	6.44
Nifty 50 Index	23622.9	1.10	0.32	-9.74	-4.07	9.51
Nifty Next 50 Index	70007.2	-0.26	-1.50	0.70	4.73	18.69
Nifty Midcap 150 Index	22257.90	0.03	-1.39	-0.30	4.14	20.71
Nifty Smallcap 250 Index	17079.10	0.14	0.51	2.22	-0.57	19.35
Nifty 500 Index	22599.80	0.60	-0.25	-5.50	-1.03	13.41

P/E

Indicies	12-Jun-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.41	26.04 - 20.15	-0.12	3,701
Nifty 50 Index	20.37	23.04 - 19.62	-0.09	1,160
Nifty Next 50 Index	18.93	22.39 - 17.09	-0.13	3,698
Nifty Midcap 150 Index	28.48	35.30- 28.48	-0.17	782
Nifty Smallcap 250 Index	33.82	34.20- 23.43	0.03	505
Nifty 500 Index	22.41	25.34 - 20.96	-0.09	1,008

Sectoral Indices

Indicies	12-Jun-26	05-Jun-26	wow%
Nifty Private Bank	27,649.70	26,299.25	5.13
Nifty Bank	56,814.80	54,496.25	4.25
Nifty PSU	8,528.75	8,259.05	3.27
Nifty Financial Services 25/50	28,093.35	27,327.85	2.80
Nifty Services	30,099.65	29,517.65	1.97
Nifty FMCG	48,827.60	48,302.45	1.09
Nifty Pharma	24,380.05	24,248.05	0.54
Nifty Auto	26,293.85	26,165.95	0.49
Nifty Realty	769.60	768.90	0.09
Nifty Oil & Gas	11,012.30	11,106.20	-0.85
Nifty Media	1,487.60	1,502.45	-0.99
Nifty PSE	9,897.10	10,080.45	-1.82
Nifty Commodities	9,896.45	10,103.30	-2.05
Nifty Metal	12,854.50	13,221.65	-2.78
Nifty IT	27,795.75	29,010.30	-4.19

Commodity & Currency

Commodities	12-Jun-26	05-Jun-26	WOW%
Gold (₹/10 g)	1,47,367.00	1,53,959.00	-4.28
Silver((₹/1 Kg)	2,41,306.00	2,57,129.00	-6.15
Brent Crude Oil (\$/Barrel)	87.71	96.02	-8.65
GBP/INR	127.84	128.11	-0.21
EUR/INR	110.36	110.83	-0.42
USD/INR	95.38	95.40	-0.02

Global Equity Markets

Country	Global Performances	12-Jun-26	05-Jun-26	WOW%	YOY%
South Korea	CAC 40	8,322.22	8,218.24	1.27	7.21
Japan	NASDAQ composite	25,809.66	25,709.43	0.39	31.26
MSCI Emerging	MSCI World Index	4,765.86	4,755.77	0.21	20.82
USA	FTSE 100	10,416.82	10,399.26	0.17	17.24
MSCI World	Shanghai Composite	4,031.51	4,027.74	0.09	18.48
French	MSCI Emerging Markets Index	1,714.68	1,722.45	-0.45	42.52
Germany	KOSPI	8,123.62	8,160.59	-0.45	178.20
UK	Nikkei 225	66,020.04	66,588.12	-0.85	72.95
China	DAX	24,515.78	24,759.05	-0.98	3.12

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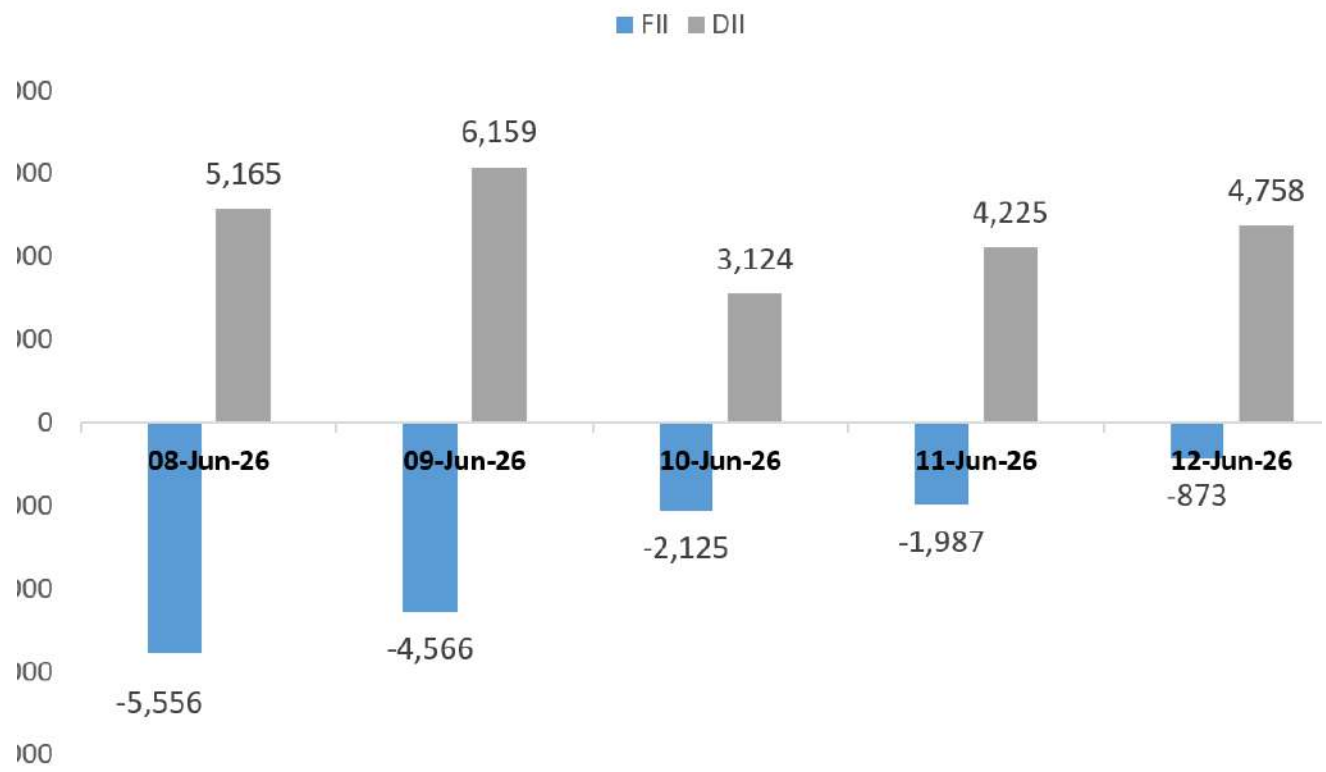
FII VS DII



Macro Indicators

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

Debt

Money Market			
Liquidity Indicators	**12-Jun-26**	**05-Jun-26**	**29-May-26**
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.27%	5.31%	5.47%
Treasury Bills	5.30%	5.56%	5.56%
G-Sec (10 yr)	6.92%	6.98%	7.01%

Top 5 Gainers

S.No	Top Gainers	12-Jun-26	05-Jun-26	WOW%
1	CarTrade Tech	2345.30	1958.40	19.76
2	Authum Investment & Infra	531.25	456.30	16.43
3	Aegis Vopak Terminals Ltd	217.85	190.19	14.54
4	Allied Blenders and Distillers Pvt Ltd	644.45	580.70	10.98
5	TBO Tek	1,352.80	1,225.20	10.41

Top 5 Losers

S.No	Top Gainers	12-Jun-26	05-May-26	WOW%
1	Oil India Ltd	417.80	483.35	-13.56
2	Onesource Specialty Pharma	1,612.50	1789.70	-9.90
3	Td Power	1192.80	1312.80	-9.14
4	Graphite India Ltd.	644.45	705.35	-8.63
5	HFCL Ltd	171.86	187.23	-8.21

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