



Weekly Market Monitor

11 September 2026

Market Overview

Indian equity markets extended their losing streak to five weeks, with Sensex down 2.27% to 74,782 and Nifty 50 falling 2.09% to 23,398. Broader indices showed resilience, with Smallcap 250 (-0.77%) and Next 50 (-1.09%) posting smaller declines. Valuations hit fresh lows, with Sensex at 19.84x and Nifty at 19.78x, breaching prior 52-week lows. Sectoral weakness was broad-based, led by Realty (-6.54%) and IT (-5.78%), alongside declines across Metals, FMCG, Financials, and Banks, signaling a clear risk-off mood. Brent crude surged 12.25% to \$102.48, crossing \$100 for the first time in months, pressuring inflation and the current account. Gold (-1.86%) and silver (-2.74%) eased, while INR weakened to 95.72/USD. Bond yields rose to 7.04%, crossing the 7% mark for the first time this year. Globally, markets were mostly negative, with KOSPI (+3.33%) the lone gainer, while DAX, Nikkei, FTSE, and NASDAQ all slipped. On the macro front, PMI improved to 54.3 in August, signaling a rebound in manufacturing activity despite the equity market weakness.

Weekly Market Review & Key Highlights

11 September 2026

Indian Equity Market

1. **Indian Equity Markets-** Markets fell sharply this week, extending losses for the fifth consecutive week the longest losing streak of the year. BSE Sensex closed at 74,781.76 -2.27% WTD and Nifty 50 at 23,398.10, -2.09% WTD. Broader markets showed relative resilience Smallcap 250 fell only -0.77% WTD and Nifty Next 50 slipped -1.09% WTD. Valuations touched fresh lows with Sensex P/E at 19.84x and Nifty 50 at 19.78x both now breaching their prior 52-week lows, signalling significant de-rating of Indian large-caps.
2. **Sectoral Performance-** All other sectors declined Realty led losses at -6.54%, followed by IT -5.78%, Metal -2.39%, FMCG -1.83%, Services -1.98%, Financial Services -2.10%, Oil & Gas -2.24%, Commodities -2.29%, and PSU -1.94%. Bank -1.33%, Private Bank -1.40%, Auto -1.47%, and Media -1.80% also declined meaningfully. The broad-based weakness spanning rate-sensitive, export-oriented, and domestic consumption sectors alike signals a risk-off shift rather than selective profit-taking.
3. **Commodities & Currency-** Brent Crude surged further to \$102.48/barrel 12.25% WoW from \$91.30 crossing the \$100 mark for the first time in recent months a significant headwind for India's current account and inflation outlook. Gold eased -1.86% WoW to ₹1,51,549/10g and Silver fell -2.74% WoW to ₹2,29,113/kg as some safe-haven rotation shifted toward crude-linked plays. The Rupee weakened to ₹95.72/USD, 1.30% WoW, reflecting pressure from the surging crude oil import bill. GBP/INR and EUR/INR both firmed to ₹129.45 1.16% and ₹111.15, 1.16% respectively.
4. **Money Market & RBI Policy Rates-** The 10-year G-Sec yield rose to 7.04% from 6.97% last week and 6.92% two weeks ago a 12 bps rise over the fortnight now crossing the 7% mark for the first time this year, reflecting the combined pressure of surging crude oil, rupee depreciation, and elevated WPI. Call Money edged up to 5.02% from 4.94%, while Treasury Bills eased marginally to 5.21% from 5.25%.
5. **Global Equity Markets-** Global markets turned broadly negative this week, reflecting risk-off sentiment. KOSPI was the lone gainer at 3.33% WoW. All other major indices declined DAX fell -1.87%, Nikkei 225 -1.57%, FTSE 100 -1.19%, MSCI World -1.18%, CAC 40 -0.89%, Shanghai Composite -1.07%, and NASDAQ -0.62%. MSCI Emerging Markets was nearly flat at -0.09%.
6. **Macro Indicators-** PMI recovered to 54.3 in August from 53.3 in July, reversing the recent moderation trend and signalling a rebound in manufacturing activity a constructive signal for industrial output ahead.

Indian Equity Market

P/E

Indicies	11-Sept-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%	Indicies	11-Sept-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	74781.76	-2.27	-2.83	-12.29	-8.30	3.67	BSE Sensex	19.84	23.70 - 19.80	-0.12	3,769
Nifty 50 Index	23398.10	-2.09	-2.83	-10.60	-5.41	6.62	Nifty 50 Index	19.78	22.92 - 19.62	-0.08	1,183
Nifty Next 50 Index	72083.70	-1.09	-2.27	3.68	7.01	16.64	Nifty Next 50 Index	19.06	21.64 - 17.09	-0.07	3,782
Nifty Midcap 150 Index	22847.85	-1.38	-2.93	2.35	6.88	14.46	Nifty Midcap 150 Index	28.57	34.83- 27.81	-0.11	800
Nifty Smallcap 250 Index	18339.90	-0.77	-0.18	9.76	7.91	14.35	Nifty Smallcap 250 Index	33.84	36.42 - 23.43	0.07	542
Nifty 500 Index	22866.50	-1.67	-2.49	-4.38	-0.12	10.05	Nifty 500 Index	22.16	24.91 - 20.96	-0.03	1,032

Sectoral Indices

Commodity & Currency

Indicies	11-Sept-26	04-Sept-26	WOW%
Nifty Pharma	26532.40	26478.10	0.21
Nifty PSE	9688.40	9710.15	-0.22
Nifty Bank	56606.55	57369.65	-1.33
Nifty Private Bank	27436.00	27824.50	-1.40
Nifty Auto	27304.50	27710.90	-1.47
Nifty Media	1537.20	1565.45	-1.80
Nifty FMCG	45053.75	45892.75	-1.83
Nifty PSU	8349.90	8514.85	-1.94
Nifty Services	29969.35	30575.55	-1.98
Nifty Financial Services 25/50	27625.90	28217.10	-2.10
Nifty Oil & Gas	10937.00	11187.65	-2.24
Nifty Commodities	9579.80	9803.85	-2.29
Nifty Metal	12999.05	13317.45	-2.39
Nifty IT	28921.50	30695.10	-5.78
Nifty Realty	848.50	907.90	-6.54

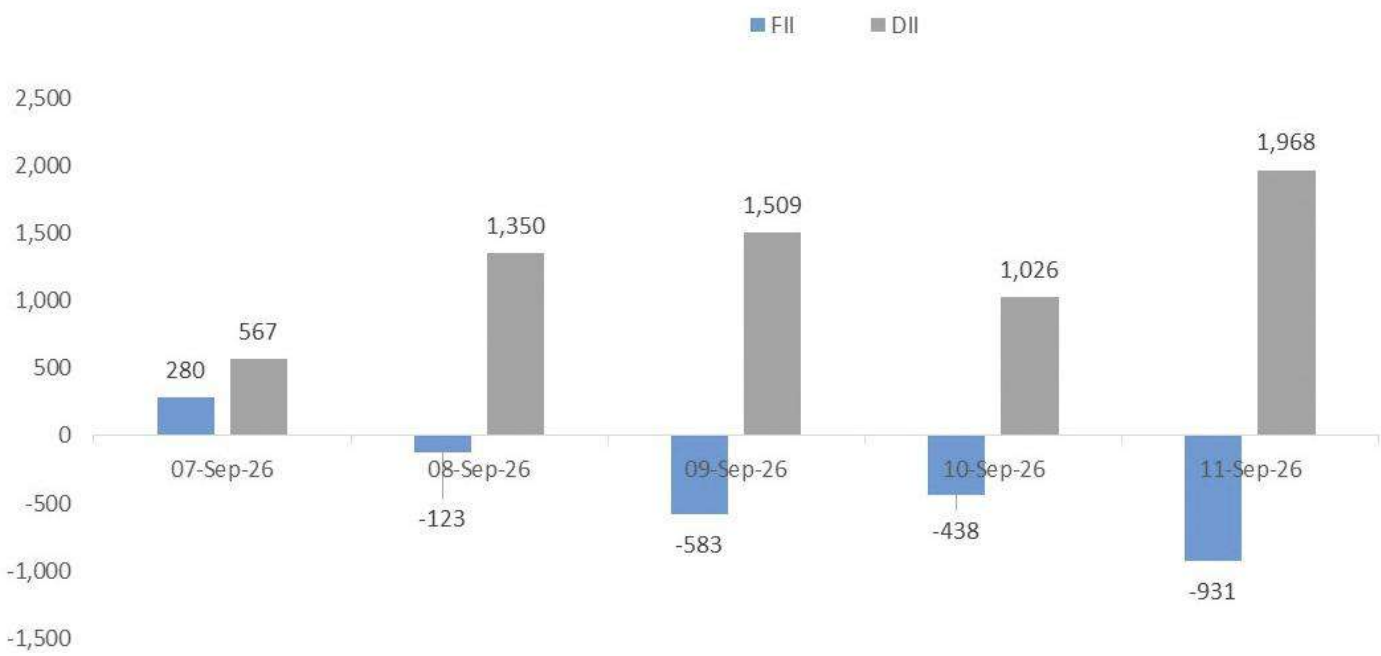
Commodities	11-Sept-26	04-Sept-26	WOW%
Gold (₹/10 g)	1,51,549.00	1,54,425.00	-1.86
Silver((₹/1 Kg)	2,29,113.00	2,35,557.00	-2.74
Brent Crude Oil (\$/Barrel)	102.48	91.30	12.25
GBP/INR	129.45	127.97	1.16
EUR/INR	111.15	109.88	1.16
USD/INR	95.72	94.49	1.30

Global Equity Markets

Country	Global Performances	11-Sept-26	04-Sept-26	WOW%	YOY%
South Korea	KOSPI	6,909.91	6,687.21	3.33	106.62
MSCI Emerging	MSCI Emerging Markets Index	1,725.12	1,726.61	-0.09	31.65
France	CAC 40	8,204.76	8,278.29	-0.89	4.86
China	Shanghai Composite	3,888.11	3,930.12	-1.07	0.33
MSCI World	MSCI World Index	4,941.15	5,000.35	-1.18	16.12
United Kingdom	FTSE 100	10,702.61	10,831.22	-1.19	15.11
Japan	Nikkei 225	64,011.34	65,034.00	-1.57	44.26
United States	NASDAQ composite	26,342.50	26,506.06	-0.62	19.49
Germany	DAX	25,571.78	26,059.35	-1.87	9.62

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Macro Indicators

Indicators	Aug'26	Jul'26	Jun'26	May'26
CPI % YOY	N.A	4.45	4.38	3.93
WPI% YOY	N.A	9.78	9.87	9.68
IIP% YOY	N.A	6.70	7.30	5.10
PMI	54.30	53.30	57.10	59.30

Debt

Money Market			
Liquidity Indicators	11-Sept-26	04-Sept-26	28-Aug-26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.02%	4.94%	5.22%
Treasury Bills	5.21%	5.25%	5.26%
G-Sec (10 yr)	7.04%	6.97%	6.92%

Top 5 Gainers

S.No	Top Gainers	11-Sept-26	04-Sept-26	WOW%
1	Raymond Ltd	1,002.80	740.85	35.36
2	Finolex Cables Ltd.	1,424.00	1,220.20	16.70
3	GMM Pfaudler Ltd	1,307.90	1,147.90	13.94
4	Graphite India Ltd.	825.80	733.60	12.57
5	Tega Industries Ltd	1,729.10	1,548.00	11.70

Top 5 Losers

S.No	Top Gainers	11-Sept-26	04-Sept-26	WOW%
1	Pfizer Ltd.	4,060.20	4609.70	-11.92
2	Pfizer Ltd.	4060.20	4609.70	-11.92
3	Godrej Properties Ltd	1748.00	1982.00	-11.81
4	Lodha Developers Ltd	1,116.90	1,222.00	-8.60
5	Zensar Technologies Ltd	425.25	461.55	-7.86

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