Weekly Market Monitor
19 June 2026

BiggPocket WEALTH MANAGEMENT

BiggPocket Fintech Private Limited

ARN No. - 325081 | APRN No. - APRN05683

Market Overview

The Indian equity market witnessed a strong recovery this week, with Sensex rising 1.69% to 76,803 and Nifty 50 gaining 1.65% to 24,013, snapping a multi-week losing streak. Broader markets outperformed, as Nifty Next 50 advanced 3.36%, Midcap 150 gained 3.21%, and Smallcap 250 surged 3.72%, reflecting improved investor confidence and risk appetite. Valuations for large caps remained near the lower end of their 52-week range (~20x), while broader markets continued to trade at a premium. Sectoral gains were led by Realty (+4.69%), PSE (+2.84%), Financial Services (+2.29%), and PSU Banks (+2.20%), while IT was the notable laggard, declining 4.18%. Market sentiment was further supported by a sharp fall in Brent crude prices, easing inflation concerns and improving the outlook for India's current account deficit. Global markets also remained positive, led by strong gains in Asian equities, while rising WPI inflation continued to be a key macroeconomic factor to monitor.

Weekly Market Review & Key Highlights
19 June 2026

Indian Equity Market

1. **Market Performance** Indian markets ended the week on a positive note, snapping a multi-week losing streak. Sensex closed at 76,803 (+1.69% WTD) and Nifty 50 at 24,013 (+1.65% WTD), driven by strong buying in Banking, Financial Services, and PSU sectors. Broader indices — Nifty Next 50 (+3.36%), Midcap 150 (+3.21%), and Smallcap 250 (+3.72%) — also recovered meaningfully, though calendar-year losses remain steep at around 8–10% for large-caps. Valuations are near multi-year lows, with Sensex and Nifty 50 P/E hovering close to their 52-week lows of 20.15x and 19.62x respectively, indicating continued de-rating but a potentially attractive zone for long-term investors.
2. **Sectoral Performance** - The week's recovery was led by Realty (+4.69%), PSE (+2.84%), Financial Services (+2.29%), and PSU Bank (+2.20%), reflecting renewed confidence in capital-intensive and government-linked sectors. Commodities, Services, and Media also posted modest gains in the +1.5–1.6% range. On the other hand, IT was the clear underperformer, falling 4.18% WoW, likely weighed down by global tech sentiment and rupee dynamics. Pharma also dipped marginally by 0.43%, while Auto and FMCG managed slim positive returns, indicating selective recovery rather than a broad sectoral rally.
3. **Commodities & Currency** - Brent Crude witnessed its steepest weekly decline in recent months, falling 12.67% WoW to $76.60/barrel, driven by progress in West Asia ceasefire diplomacy and a reduction in supply-risk premiums. This is a significant tailwind for India's current account deficit and could ease imported inflation pressure if sustained. Gold fell 1.87% WoW to ₹1,44,606/10g and Silver dropped 3.93% WoW to ₹2,31,829/kg as safe-haven demand faded with improving geopolitical sentiment. On the currency front, the Rupee remained largely stable against the USD at ₹94.47 (–0.95% WoW), while GBP/INR and EUR/INR softened 2.53% and 2.11% respectively, reflecting relative USD strength.
4. **Money Market & RBI Policy Rates-** 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** Global markets delivered broadly positive returns for the week. KOSPI (South Korea) was the top performer globally with a remarkable +11.43% WoW gain, followed by Nikkei 225 (+7.92%) and NASDAQ Composite (+2.74%). MSCI Emerging Markets rose 3.98%, benefiting from softening crude and improved risk appetite. European markets were mixed — DAX gained 1.65%, CAC 40 added 1.19%, but FTSE 100 slipped marginally by 1.04%. MSCI World was up 1.29% for the week. On a YoY basis, KOSPI leads dramatically at +204%, followed by Nikkei (+85.12%) and MSCI EM (+51.44%), while India's Nifty 50 lags at –1.93% YoY, underscoring the relative underperformance of domestic large-caps over the past year.
6. **Macro Indicators** - WPI which has accelerated sharply to 9.68% in May from 2.13% in February, indicating significant pipeline cost pressures.

Indian Equity Market

Indicies	19-Jun-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	76802.90	1.69	2.71	-9.91	-5.60	6.73
Nifty 50 Index	24013.1	1.65	1.98	-8.25	-1.93	9.85
Nifty Next 50 Index	72356.65	3.36	1.81	4.08	10.99	19.18
Nifty Midcap 150 Index	22972.95	3.21	1.78	2.91	9.97	21.04
Nifty Smallcap 250 Index	17713.80	3.72	4.25	6.01	9.97	19.84
Nifty 500 Index	23144.20	2.41	2.15	-3.22	9.97	13.84

P/E

Indicies	19-Jun-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.76	26.04 - 20.15	-0.12	3,700
Nifty 50 Index	20.71	23.04 - 19.62	-0.09	1,159
Nifty Next 50 Index	19.48	22.39 - 17.09	-0.13	3,714
Nifty Midcap 150 Index	29.40	35.30- 28.48	-0.17	781
Nifty Smallcap 250 Index	35.07	35.07- 23.43	0.03	505
Nifty 500 Index	22.93	25.34 - 20.96	-0.09	1,009

Sectoral Indices

Indicies	19-Jun-26	12-Jun-26	WOW%
Nifty Realty	811.90	769.60	5.50
Nifty PSE	10,178.50	9,897.10	2.84
Nifty Financial Services 25/50	28,737.80	28,093.35	2.29
Nifty PSU	8,716.50	8,528.75	2.20
Nifty Media	1,515.40	1,487.60	1.87
Nifty Commodities	10,055.80	9,896.45	1.61
Nifty Services	30,562.70	30,099.65	1.54
Nifty Bank	57,685.75	56,814.80	1.53
Nifty FMCG	49,558.70	48,827.60	1.50
Nifty Oil & Gas	11,169.75	11,012.30	1.43
Nifty Metal	13,020.80	12,854.50	1.29
Nifty Auto	26,583.35	26,293.85	1.10
Nifty Private Bank	27,892.05	27,649.70	0.88
Nifty Pharma	24,460.30	24,380.05	0.33
Nifty IT	27,426.85	27,795.75	-1.33

Commodity & Currency

Commodities	19-Jun-26	12-Jun-26	WOW%
Gold (₹/10 g)	144,606.00	147,367.00	-1.87
Silver((₹/1 Kg)	231,829.00	241,306.00	-3.93
Brent Crude Oil ($/Barrel)	76.60	87.71	-12.67
GBP/INR	124.60	127.84	-2.53
EUR/INR	108.03	110.36	-2.11
USD/INR	94.47	95.38	-0.95

Global Equity Markets

Country	Global Performances	19-Jun-26	12-Jun-26	WOW%	YOY%
South Korea	KOSPI	9,052.42	8,123.62	11.43	204.00
Japan	Nikkei 225	71,250.06	66,020.04	7.92	85.12
MSCI Emerging	MSCI Emerging Markets Index	1,782.97	1,714.68	3.98	51.44
United States	NASDAQ composite	26,517.93	25,809.66	2.74	35.67
Germany	DAX	25,043.00	24,635.30	1.65	8.32
China	Shanghai Composite	4,090.48	4,031.51	1.46	21.66
MSCI World	MSCI World Index	4,827.55	4,765.86	1.29	24.20
France	CAC 40	8,421.14	8,322.22	1.19	11.49
United Kingdom	FTSE 100	10,363.27	10,471.72	-1.04	17.92

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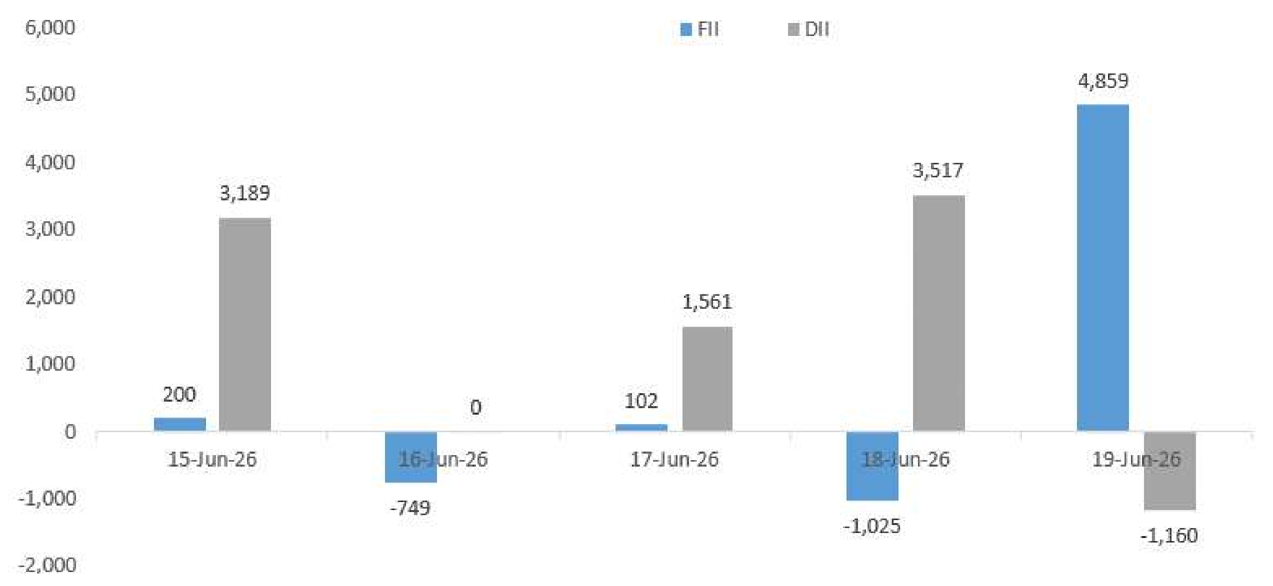
FII VS DII



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	9.68
IIP% YOY	5.20	4.10	4.90	N.A
PMI	58.10	57.00	58.2	59.3

Debt

Money Market			
Liquidity Indicators	**19-Jun-26**	**12-Jun-26**	**05-Jun-26**
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.36%	5.27%	5.31%
Treasury Bills	5.26%	5.30%	5.56%
G-Sec (10 yr)	6.85%	6.92%	6.98%

Top 5 Gainers

S.No	Top Gainers	19-Jun-26	12-Jun-26	WOW%
1	New India Assurance Company Ltd	202.31	152.80	32.40
2	Carborundum Universal Ltd	1241.70	1053.10	17.91
3	Olectra Greentech Ltd	1,520.30	1,296.00	17.31
4	Gabriel India Ltd	1,197.40	1,040.60	15.07
5	Bharat Dynamics Ltd	1,373.40	1,200.20	14.43

Top 5 Losers

S.No	Top Gainers	19-Jun-26	12-Jun-26	WOW%
1	Avanti Feeds Ltd	967.70	1,060.10	-8.72
2	Tata Motors Passenge	359.50	390.00	-7.82
3	Infosys Ltd	1051.40	1116.40	-5.82
4	Shaily Engineering Plastics Ltd	2,799.35	2970.50	-5.76
5	Ather Energy Ltd	971.70	1,028.70	-5.54