



# Weekly Market Monitor

## 19 June 2026

### 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

#### P/E

| Indicies                 | 19-Jun-26 | WTD% | MTD% | CYTD% | 1 Yr% | 3Yr%  | Indicies                 | 19-Jun-26 | 52 Weeks H/L  | YOY%  | EPS   |
|--------------------------|-----------|------|------|-------|-------|-------|--------------------------|-----------|---------------|-------|-------|
| BSE Sensex               | 76802.90  | 1.69 | 2.71 | -9.91 | -5.60 | 6.73  | BSE Sensex               | 20.76     | 26.04 - 20.15 | -0.12 | 3,700 |
| Nifty 50 Index           | 24013.1   | 1.65 | 1.98 | -8.25 | -1.93 | 9.85  | Nifty 50 Index           | 20.71     | 23.04 - 19.62 | -0.09 | 1,159 |
| Nifty Next 50 Index      | 72356.65  | 3.36 | 1.81 | 4.08  | 10.99 | 19.18 | Nifty Next 50 Index      | 19.48     | 22.39 - 17.09 | -0.13 | 3,714 |
| Nifty Midcap 150 Index   | 22972.95  | 3.21 | 1.78 | 2.91  | 9.97  | 21.04 | Nifty Midcap 150 Index   | 29.40     | 35.30- 28.48  | -0.17 | 781   |
| Nifty Smallcap 250 Index | 17713.80  | 3.72 | 4.25 | 6.01  | 9.97  | 19.84 | Nifty Smallcap 250 Index | 35.07     | 35.07- 23.43  | 0.03  | 505   |
| Nifty 500 Index          | 23144.20  | 2.41 | 2.15 | -3.22 | 9.97  | 13.84 | Nifty 500 Index          | 22.93     | 25.34 - 20.96 | -0.09 | 1,009 |

#### Sectoral Indices

#### Commodity & Currency

| 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 |

| 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  |

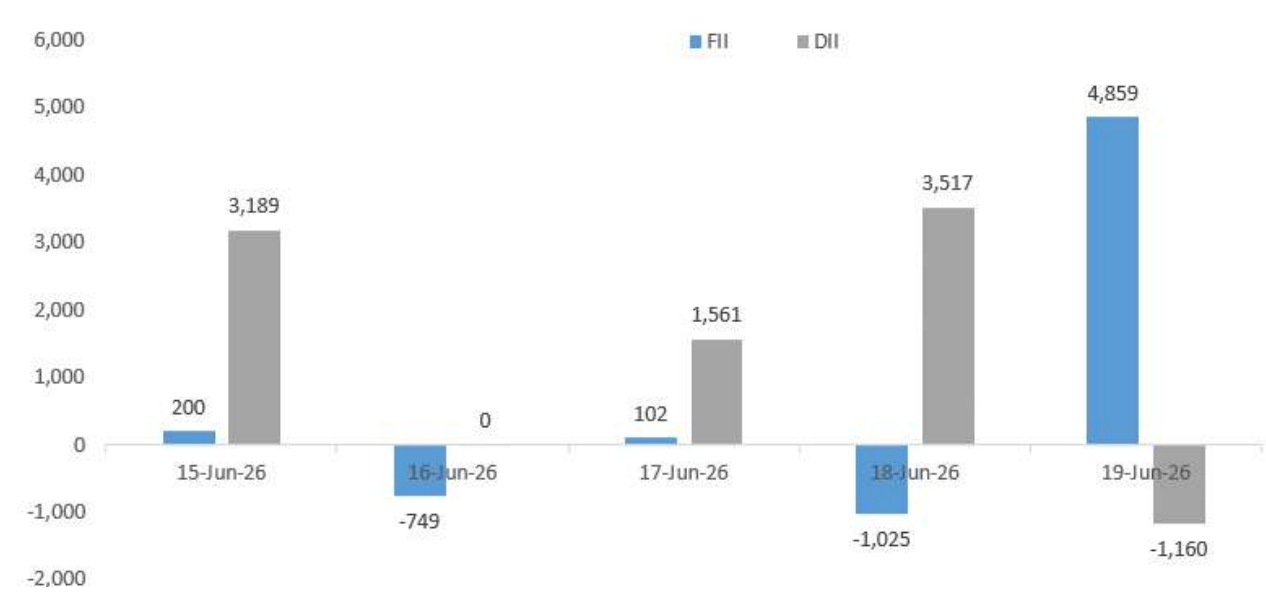
#### Global Equity Markets

| 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 |

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