Weekly Market Monitor
24 July 2026

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

Market Overview

The Indian equity market witnessed a weak week, with Sensex declining 2.68% to 76,060 and Nifty 50 falling 2.33% to 23,767, reversing the previous week's gains amid renewed market caution. Broader markets proved relatively resilient, with Midcap 150 and Smallcap 250 posting smaller declines while retaining positive CYTD returns. Valuations for benchmark indices remained near the lower end of their 52-week range (~20x), reinforcing an attractive long-term entry point. Sectoral performance was broadly negative, with FMCG (+0.62%) and Auto (+0.44%) emerging as the only notable gainers, while Private Banks, Realty, and Financial Services led the declines. Meanwhile, Brent crude surged to $92.19 per barrel, bond yields edged higher, and the Rupee remained broadly stable, keeping inflation concerns elevated despite mixed global market performance.

Weekly Market Review & Key Highlights
24 July 2026

Indian Equity Market

1. **Indian Equity Markets-** Indian markets turned negative this week, with BSE Sensex closing at 76,059.77 (-2.68% WTD) and Nifty 50 at 23,767.45 (-2.33% WTD), pulling back from last week's gains. MTD returns also slipped into the red at -0.55% and -0.41% respectively. CYTD losses deepened to -10.79% for Sensex and -9.19% for Nifty 50. Broader markets held relatively better. Nifty Next 50 was nearly flat (-0.09% WTD), while Midcap 150 (-1.23%) and Smallcap 250 (-2.23%) also saw corrections, though they retain positive CYTD returns of +1.62% and +5.34%. Valuations contracted further, with Sensex P/E at 20.48x and Nifty 50 at 20.29x both approaching 52-week lows of 20.15x and 19.62x keeping the long-term entry case intact.
2. **Sectoral Performance-** This week's sectoral action was broadly negative, with most sectors giving back recent gains. FMCG (+0.62%) and Auto (+0.44%) were the only notable gainers, supported by resilient domestic consumption. Media and PSE managed marginal positive returns close to flat. On the downside, Private Bank fell the sharpest at -4.32%, followed by Realty (-4.02%), Financial Services (-3.07%), Bank (-3.12%), and Services (-3.17%) reversing last week's leadership. IT, which had led gains last week at +4.34%, also corrected -1.57% this week. Oil & Gas slid -1.96%, reflecting crude-related caution.
3. **Commodities & Currency-** Brent Crude Oil continued its recovery, surging further to $92.19/barrel up 16.77% WoW from $78.95 last week a material headwind for India's import bill and inflation trajectory. Gold rose 1.84% WoW to ₹1,43,238/10g and Silver gained 3.26% WoW to ₹2,22,824/kg, reflecting a mild return of safe-haven demand. On the currency front, the Rupee held broadly stable at ₹96.54/USD (+0.18% WoW). GBP/INR eased slightly to ₹128.53 (-1.00% WoW) and EUR/INR to ₹109.87 (-0.43% WoW), reflecting modest USD softening against major currencies.
4. **Money Market & RBI Policy Rates** Short-term rates firmed marginally this week. The 10-year G-Sec yield rose to 6.86% from 6.78% last week and 6.74% two weeks ago, reflecting some tightening in long-end sentiment likely tracking the surge in crude prices and renewed inflation concerns. Call Money edged up to 5.12% from 5.40%, while Treasury Bills climbed to 5.35% from 5.33%, pointing to mild tightening in short-term liquidity.
5. **Global Equity Markets** Global markets delivered mixed returns this week. China's Shanghai Composite led gainers at +1.33% WoW, followed by Germany's DAX (+1.08%), FTSE 100 (+0.98%), CAC 40 (+0.75%), and Nikkei 225 (+0.73%). MSCI Emerging Markets inched up +0.45%, while MSCI World dipped marginally -0.39%. South Korea's KOSPI fell -1.91% and NASDAQ corrected -2.13% the latter reflecting some profit-taking in US tech. On a YoY basis, KOSPI (+109.71%) and Nikkei (+54.47%) remain the top global performers, while India's Nifty 50 trails at -4.30% YoY.

Indian Equity Market

Indicies	24-Jul-26	WTD%	MTD%	CYTD%	1 Yr%	3Yr%
BSE Sensex	76059.77	-2.68	-0.55	-10.79	-7.45	4.64
Nifty 50 Index	23767.45	-2.33	-0.41	-9.19	-4.30	7.79
Nifty Next 50 Index	71766.00	-0.09	0.19	3.23	6.15	18.53
Nifty Midcap 150 Index	22685.25	-1.23	-0.39	1.62	4.09	18.82
Nifty Smallcap 250 Index	17601.20	-2.23	-0.67	5.34	-0.53	17.40
Nifty 500 Index	22913.30	-1.81	-0.36	-4.19	-0.98	11.85

P/E

Indicies	24-Jul-26	52 Weeks H/L	YOY%	EPS
BSE Sensex	20.48	23.60 - 20.15	-0.13	3,714
Nifty 50 Index	20.29	22.92 - 19.62	-0.11	1,171
Nifty Next 50 Index	19.10	22.07 - 17.09	-0.13	3,757
Nifty Midcap 150 Index	30.14	35.30- 27.81	-0.15	753
Nifty Smallcap 250 Index	34.37	36.42 - 23.43	0.00	512
Nifty 500 Index	22.65	25.17 - 20.96	-0.10	1,012

Sectoral Indices

Indicies	24-Jul-26	17-Jul-26	WOW%
Nifty FMCG	49053.30	48748.70	0.62
Nifty Auto	27217.95	27099.75	0.44
Nifty Media	1527.45	1521.45	0.39
Nifty PSE	9952.30	9938.55	0.14
Nifty Metal	12401.55	12436.95	-0.28
Nifty Pharma	25548.15	25645.00	-0.38
Nifty PSU	8345.65	8381.75	-0.43
Nifty Commodities	9764.75	9832.10	-0.69
Nifty IT	28767.95	29226.60	-1.57
Nifty Oil & Gas	11077.00	11268.65	-1.96
Nifty Financial Services 25/50	28351.40	29250.60	-3.07
Nifty Bank	56693.50	58521.40	-3.12
Nifty Services	30442.30	31439.45	-3.17
Nifty Realty	881.80	918.70	-4.02
Nifty Private Bank	27277.55	28508.50	-4.32

Commodity & Currency

Commodities	24-Jul-26	17-Jul-26	WOW%
Gold (₹/10 g)	143,238.00	140,653.00	1.84
Silver((₹/1 Kg)	222,824.00	215,786.00	3.26
Brent Crude Oil ($/Barrel)	92.19	78.95	16.77
GBP/INR	128.53	129.83	-1.00
EUR/INR	109.87	110.34	-0.43
USD/INR	96.54	96.37	0.18

Global Equity Markets

Country	Global Performances	24-Jul-26	17-Jul-26	WOW%	YOY%
China	**Shanghai Composite**	3,814.20	3,764.15	1.33	5.78
Germany	**DAX**	25,099.00	24,830.98	1.08	3.31
United Kingdom	**FTSE 100**	10,665.12	10,562.13	0.98	17.49
France	**CAC 40**	8,372.28	8,310.27	0.75	7.09
Japan	**Nikkei 225**	64,611.15	64,141.12	0.73	54.47
MSCI Emerging	**MSCI Emerging Markets Index**	1,628.03	1,620.66	0.45	29.44
MSCI World	**MSCI World Index**	4,788.90	4,807.71	-0.39	16.03
South Korea	**KOSPI**	6,690.62	6,820.60	-1.91	109.71
United States	**NASDAQ composite**	24,975.82	25,520.24	-2.13	18.32

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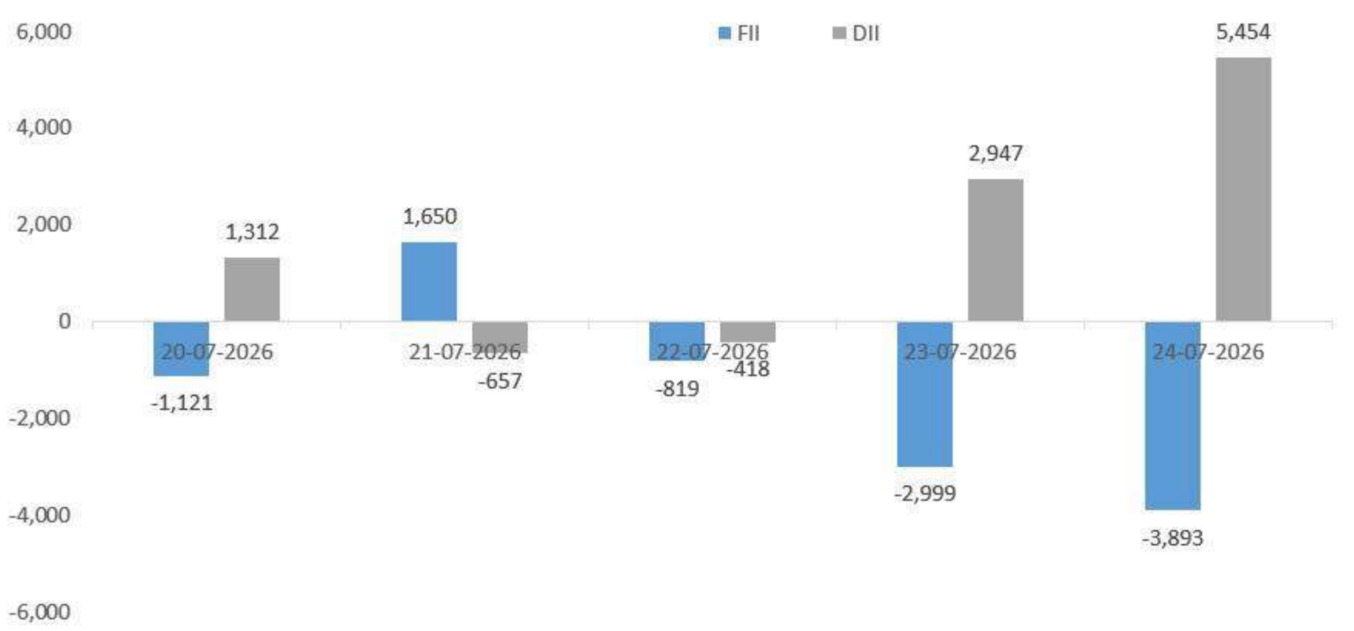
FII VS DII



Macro Indicators

Indicators	Jun'26	May'26	Apr'26	Mar'26
CPI % YOY	4.38	3.93	3.48	3.40
WPI% YOY	9.87	9.68	8.30	3.88
IIP% YOY	N.A	5.10	4.90	4.10
PMI	57.10	59.30	58.20	57.00

Debt

Money Market			
Liquidity Indicators	**24-Jul-26**	**17-Jul-26**	**10-Jun-26**
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.35%	3.35%	3.35%
Call Money	5.12%	5.40%	5.35%
Treasury Bills	5.35%	5.33%	5.27%
G-Sec (10 yr)	6.86%	6.78%	6.74%

Top 5 Gainers

S.No	Top Gainers	24-Jul-26	17-Jul-26	WOW%
1	Bluestone Jewellery and Lifestyle Ltd	772.40	599.05	28.94
2	Data Patterns	4,584.50	3,990.70	14.88
3	Gujarat Fluorochemicals Ltd.	4,573.70	4,144.90	10.35
4	Mahindra and Mahindra Financial	356.50	324.20	9.96
5	Jana Small Finance Bank Ltd	536.95	493.00	8.91

Top 5 Losers

S.No	Top Gainers	24-Jul-26	17-Jul-26	WOW%
1	Bandhan Bank Ltd	165.93	213.25	-22.19
2	Gallantt Ispat Ltd	521.20	651.70	-20.02
3	Kirloskar Pneumatic Company Ltd	1,497.10	1,696.00	-11.73
4	Aditya Birla Sun Life Amc Ltd	1017.00	1,150.60	-11.61
5	Cemindia Projects Ltd	1441.00	1615.00	-10.77

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