



Weekly Market Monitor

10 April 2026

Market Overview

The Indian equity market staged a strong rebound this week, with Sensex and Nifty 50 closing higher after two consecutive bearish weeks, narrowing year-to-date losses. Midcaps (+4.5%) and small caps (+4.8%) outperformed, while the Nifty Next 50 gained (+3.7%), reflecting broad participation. Large-cap valuations are near 52-week lows, drawing value investors, whereas mid and small caps remain relatively expensive. Sector rotation favored cyclicals such as Realty (+13%), Auto (+10.6%), and Financials (+9.1%), while defensives like IT (+1.9%) and Pharma (+1.6%) lagged. Foreign institutional investors turned net buyers for the first time since February, complementing steady domestic inflows and providing a dual tailwind. Money market rates stayed stable, with the RBI holding repo at 5.25%, supporting valuations. Globally, strong gains in NASDAQ (+4.45%), DAX (+3.37%), and MSCI EM (+7.07%) reinforced the risk-on sentiment, amplifying India’s recovery narrative.

Weekly Market Review & Key Highlights

10 April 2026

Indian Equity Market

1. Market Performance
- After a couple of consecutive bearish weeks, this week sees a welcome green recovery — broad indices posted gains, signalling a potential short-term reversal in sentiment. Sensex rose to 77,550 and Nifty 50 to 24,051, rebounding from recent lows. Nifty Next 50 (+3.7%), Midcap 150 (+4.5%), Smallcap 250 (+4.8%) — all segments participated in the rally, reflecting renewed risk appetite across market caps.
2. P/E Valuations
- Indices near 52-week P/E lows: Sensex 20.15x (26.04-20.15), Nifty 50 19.96x (23.04-19.63), Midcap 150 31.2x (36.57-29.73), Smallcap 250 26.65x (34.2-24.12) — large caps attractive, mid/small still premium. Largecap approach fair value, tempting value buyers while midcaps risk further derating. Sectoral Indices
3. Sectoral Indices
- Realty +13.0%, Auto +10.6%, Financial Services +9.1%, Private Bank +8.6%, Bank +8.5% led gains — broad-based recovery with cyclicals and financials at the forefront. PSU +7.9%, Metal +7.9%, Commodities +5.8%, IT +1.9%, Pharma +1.6% also in green — sectoral breadth confirms a genuine risk-on week, unlike previous rotational moves.
4. FII vs DII
- FIIs turned net BUYERS this week — first time since Feb’26 — marking a significant shift after weeks of sustained selling. This supported by continued DII buying, provides dual tailwind for markets. Renewed FII participation is a key sentiment positive and may sustain the recovery rally if maintained.
5. Money Market & RBI Monetary Policy
- RBI MPC (concluded 9 Apr’26) kept repo rate unchanged at 5.25% with a neutral stance, balancing inflation management and growth support. G-Sec 10yr stable at 7.01%, Repo/Rev Repo steady at 5.25%/3.25%, Call Money at 5.05% — liquidity conditions remain balanced. Rate hold with neutral stance supports equity valuations; market had largely priced this in, limiting volatility impact.
6. Global Markets
- FTSE 100 +1.75% to 10,619, DAX +3.37% to 23,949, CAC 40 +3.74% to 8,260, NASDAQ +4.45% to 22,854 led gains; MSCI World +3.63%, MSCI EM +7.07% — global risk-on tone aided domestic sentiment. Strong global cues alongside FII return to buying amplify the week’s recovery narrative for Indian markets.

Indian Equity Market

Indices	10 Apr '26	WTD%	MTD%	CYTD%	1Yr%	3Yrs%
BSE Sensex	77550.25	5.77	7.79	-9.04	4.65	8.99
Nifty 50 Index	24050.60	5.89	7.70	-8.11	8.57	12.21
Nifty Next 50 Index	67641.25	9.17	12.08	-2.71	12.59	21.82
Nifty Midcap 150 Index	21300.30	7.55	9.62	-4.59	17.31	23.43
Nifty Smallcap 250 Index	15753.05	6.99	10.25	-5.72	10.44	21.25
Nifty 500 Index	22346.75	6.73	8.86	-6.56	10.82	15.85

P/E

Indices	10 Apr '26	52 Weeks H/L	YOY%	EPS
BSE Sensex	21.31	26.04 - 20.15	0.04	3,639
Nifty 50 Index	21.13	23.04 - 19.63	0.05	1,138
Nifty Next 50 Index	19.15	22.72 - 17.34	0.03	3,532
Nifty Midcap 150 Index	33.55	36.57 - 29.73	-0.34	635
Nifty Smallcap 250 Index	28.51	34.2 - 24.12	-0.24	553
Nifty 500 Index	23.12	25.34 - 21.32	-0.05	967

Sectoral Indices

Indicies	10 Apr'26	03 Apr '26	WOW%
Nifty Realty	759.25	672.10	12.97
Nifty Auto	26,640.90	24,089.65	10.59
Nifty Financial Services 25/50	28,584.35	26,211.50	9.05
Nifty Private Bank	26,779.95	24,665.75	8.57
Nifty Bank	55,912.75	51,548.75	8.47
Nifty PSU	8,778.25	8,134.40	7.92
Nifty Metal	12,356.40	11,456.60	7.85
Nifty Commodities	9,754.60	9,216.80	5.83
Nifty PSE	10,173.10	9,666.90	5.24
Nifty Media	1,365.20	1,303.35	4.75
Nifty FMCG	48,194.05	46,232.15	4.24
Nifty Oil & Gas	11,193.40	10,842.35	3.24
Nifty Services	29,818.90	28,979.45	2.90
Nifty IT	31,030.60	30,441.45	1.94
Nifty Pharma	22,164.85	21,808.40	1.63

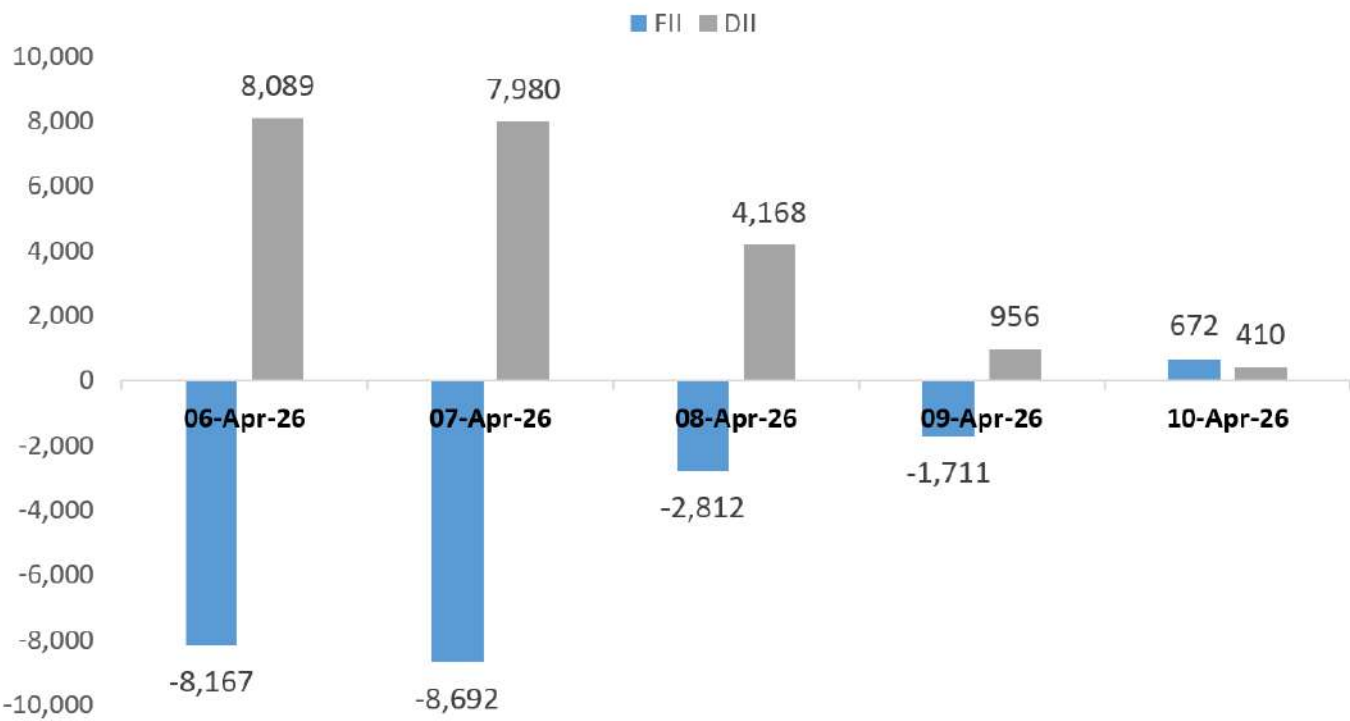
Commodity & Currency

Commodities	10 Apr'26	03 Apr'26	WOW%
Gold (₹/10 g)	1,49,646.00	1,46,091.00	-2.38
Silver (₹/1 Kg)	2,39,775.00	2,27,633.00	-5.06
Brent Crude Oil (\$/Barrel)	97.87	100.12	2.30
GBP/INR	124.31	123.19	-0.91
EUR/INR	108.28	107.48	-0.73
USD/INR	92.65	93.21	0.60

Global Equity Markets

Country	Global Performances	03 Apr'26	10 Apr'26	WOW%	YOY%
UK	FTSE 100	10,436.29	10,618.98	1.75	34.19
Germany	DAX	23,168.08	23,948.99	3.37	16.47
French	CAC 40	7,962.39	8,259.60	3.73	15.91
MSCI World	MSCI World Index	4,314.16	4,471.04	3.64	30.66
USA	NASDAQ composite	21,879.18	22,853.68	4.45	39.46
MSCI Emerging	MSCI Emerging Markets Index	1,443.57	1,545.34	7.05	50.20
Japan	Nikkei 225	53,123.49	56,924.11	7.15	64.48
China	Shanghai Composite	3,880.10	3,986.22	2.73	23.66
South Korea	KOSPI	5,377.30	5,858.87	8.96	139.24

FII VS DII



Macro Indicators

Indicators	Nov'25	Dec'25	Jan'25	Feb'26
CPI % YOY	0.71	1.33	2.75	3.21
WPI% YOY	-0.32	0.83	1.81	2.13
IIP% YOY	6.70	7.80	4.80	5.20
PMI	59.70	57.80	59.50	58.10

Debt

Money Market			
Liquidity Indicators	10 Apr'26	03 Apr'26	27 Mar'26
Repo Rate	5.25%	5.25%	5.25%
Reverse Repo Rate	3.25%	3.25%	3.25%
Call Money	5.05%	5.46%	5.46%
Treasury Bills	5.31%	0.00%	0.00%
G-Sec (10 yr)	7.01%	7.01%	7.01%

Top 5 Gainers

S.No	Top Gainers	10 Apr'26	03 Apr'26	WOW%
1	Adani Green Energy	1,085.35	856.00	26.79
2	Epigral	1,098.30	883.50	24.31
3	Adani Energy Solutio	1,157.90	941.60	22.97
4	Avanti Feeds	1,459.10	1,213.90	20.20
5	Neuland Laboratories	14951.00	12433.00	20.25

Top 5 Losers

S.No	Top Gainers	10 Apr'26	03 Apr'26	WOW%
1	Shaily Engineering Plastic Ltd	1,950.50	2,083.30	-6.37
2	Great Eastern Shipping Co. Ltd	1,372.90	1,459.60	-5.94
3	Ganesh Ecosphere Ltd	1,045.75	1,110.15	-5.80
4	Chennai Petroleum	973.85	1,032.25	-5.66
5	Vinati Organics Ltd	1,254.40	1,309.00	-4.17

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