INGENETUS

WEEKLY MARKET UPDATE

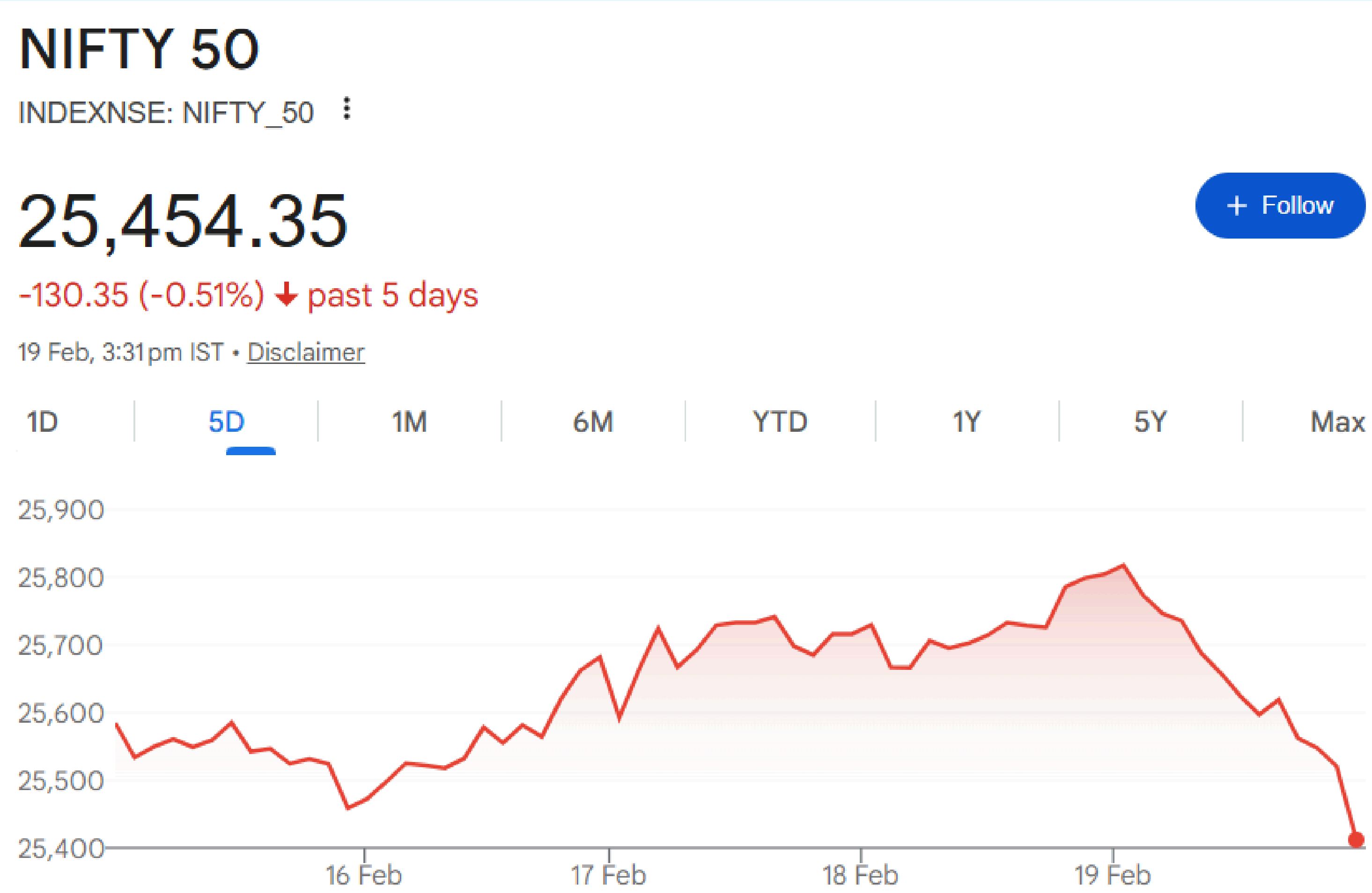
13th Feb, 2026 to 19th Feb, 2026

MARKET OVERVIEW

Markets See Swings as IT Pressure, Global Cues and Macro Signals Drive Sentiment

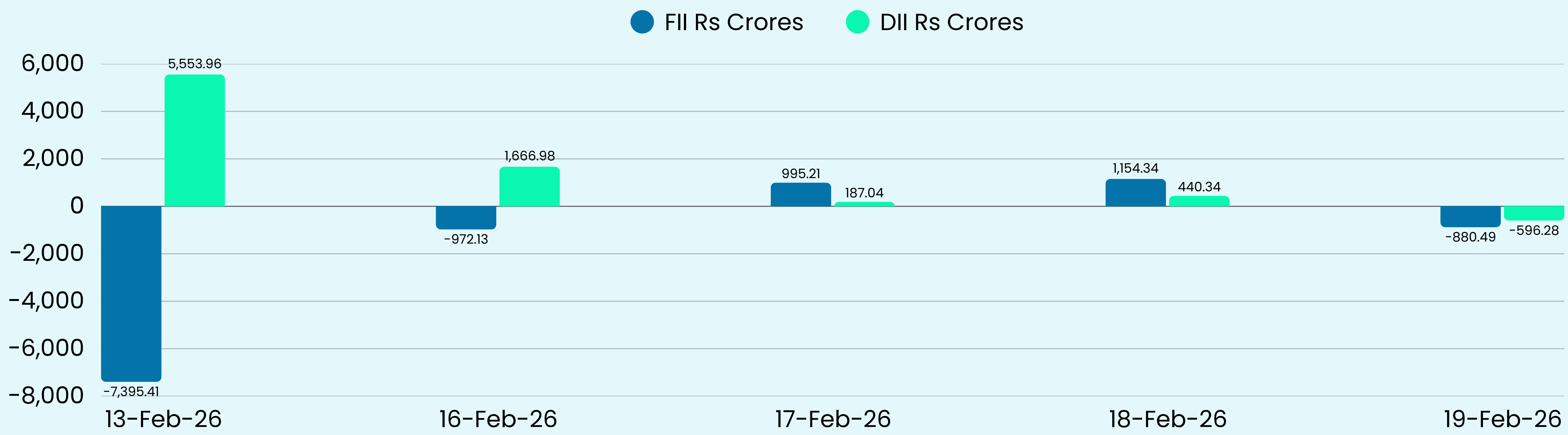
- Indian equities fell as IT stocks led losses on AI disruption fears, while strong U.S. jobs data reduced expectations of early Fed rate cuts.
- Markets declined again amid broad-based selling and weak global cues, with sentiment hit by worries over rising competition for Indian IT firms.
- Equities rebounded despite muted global signals, even as IT weakness persisted and higher wholesale inflation added macro concerns.
- Markets closed with modest gains as geopolitical tensions eased, diplomatic talks progressed, and PSU banks outperformed on strong results.
- Investors stayed cautious, tracking global cues, interest-rate expectations, and sector-specific movements.

As a result, the BSE Sensex down by 0.40%, closing at 82,498.14 , while the Nifty 50 down by 0.51%, settling at 25,454.35



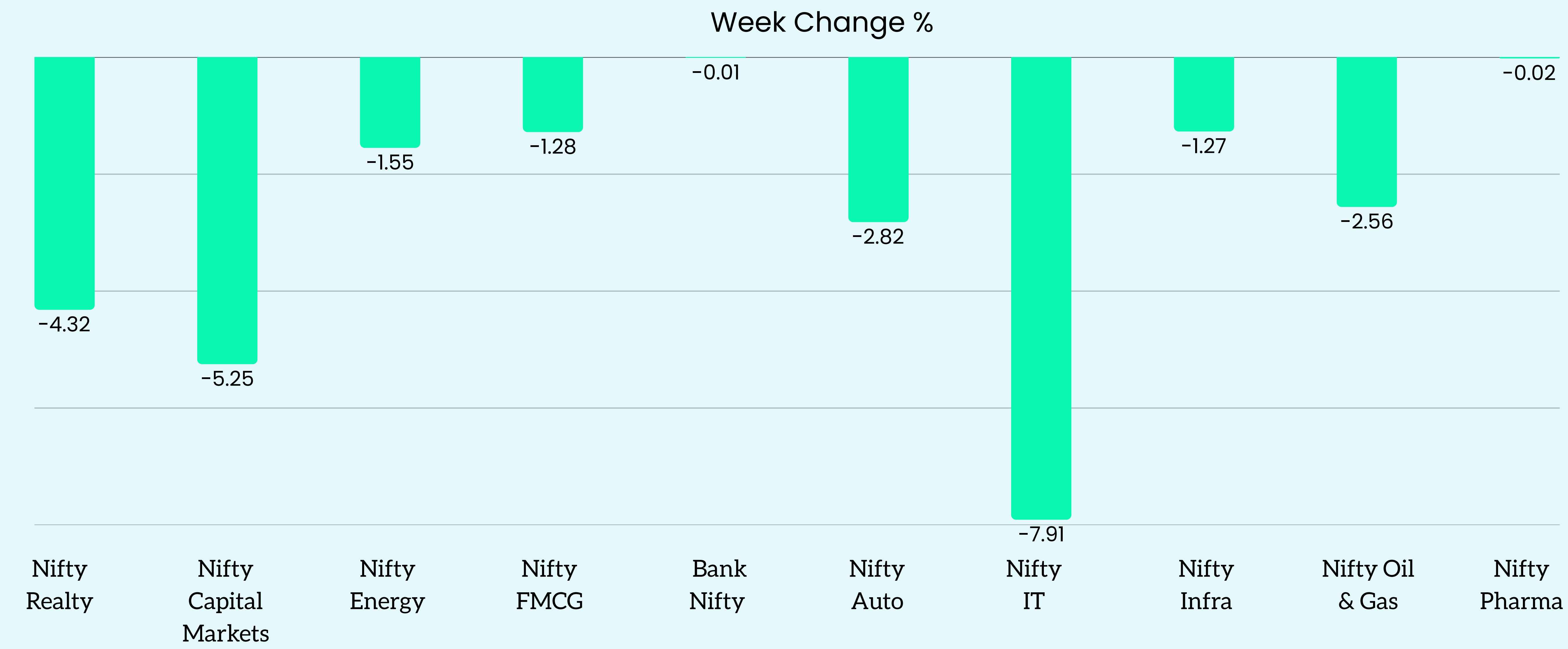
INSTITUTIONAL INVESTMENT TRENDS

- FIIs recorded a net outflow of ₹7,098.48 crore, indicating continued foreign selling pressure in the markets.
- DIIs posted a net inflow of ₹ 7,252.04 crore, providing strong domestic support to the equity markets.



SECTORAL HIGHLIGHTS

- Bank Nifty was among the best performers, staying nearly flat as relative strength in financials limited downside.
- Pharma also outperformed the broader market, showing defensive resilience amid overall sectoral weakness.
- IT was the worst performer with a sharp fall, reflecting heavy selling pressure and continued concerns around global tech outlook.
- Capital Markets also declined steeply, indicating risk-off sentiment and profit booking in high-beta financial plays.

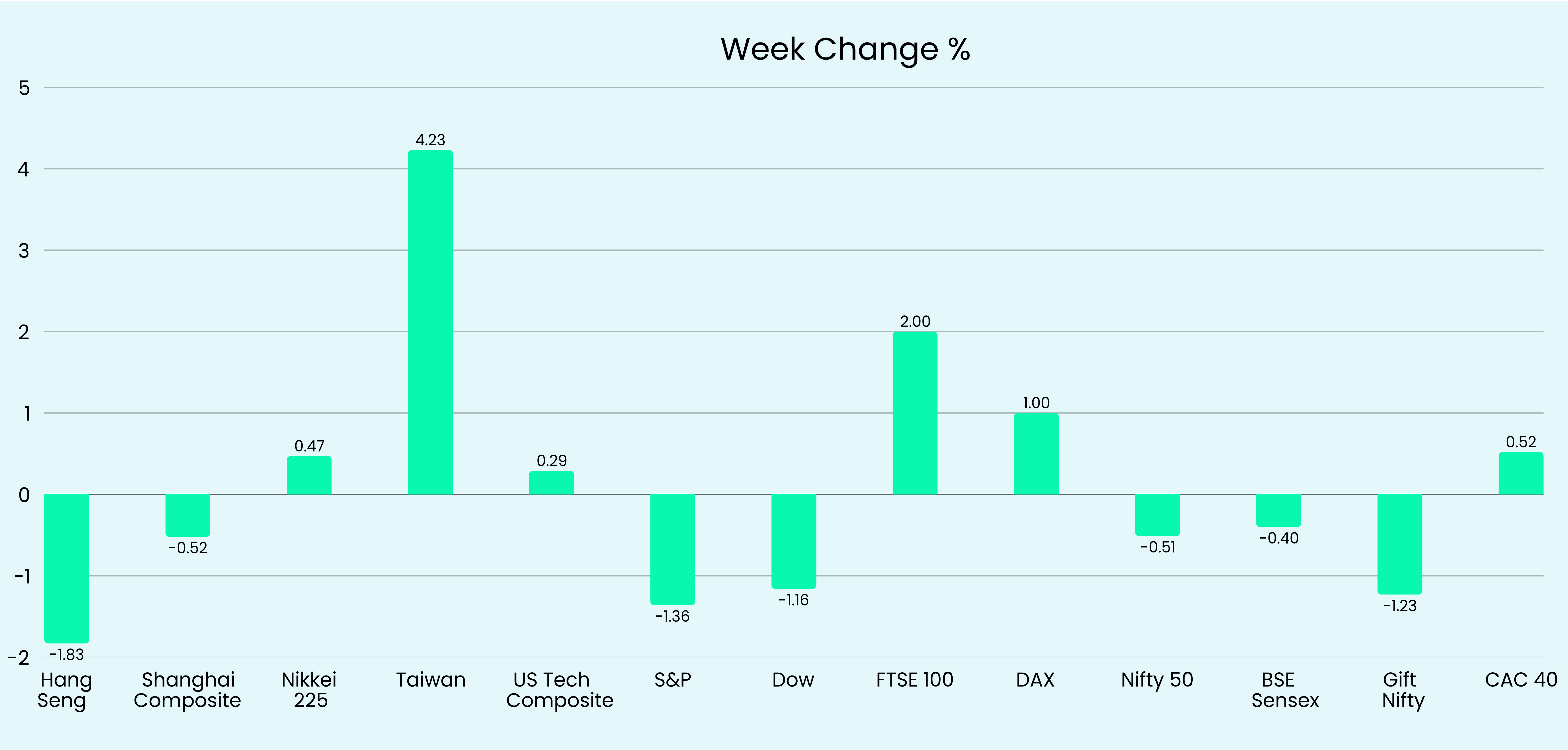


KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE	Monthly	Jan - 2026	2.75%
INTEREST RATE	Daily	06 - Feb	5.25%
UNEMPLOYMENT RATE	Monthly	Jan-2026	5.00%
GDP	Yearly	2025	$4.2 Trillion
GDP ANNUAL GROWTH RATE	Quarterly	Sept-2025	8.20%
GDP PER CAPITA	Yearly	2025	$2880
FISCAL EXPENDITURE	Monthly	Dec-2025	₹ 33,80,998 Crore
10-YEAR GOVERNMENT BOND YIELD	Daily	18 - Feb	6.68%

GLOBAL EQUITY MARKET OVERVIEW

- Taiwan led global markets with a sharp ~4.23% weekly gain, standing out as the strongest performer.
- FTSE 100 showed solid strength with a ~2.00% rise, outperforming most developed market peers.
- Hang Seng was the weakest index, falling ~1.83% and reflecting heavy regional pressure.
- S&P 500 declined ~1.36%, making it one of the poorest performers among major global indices.



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