INGENETUS

WEEKLY MARKET UPDATE

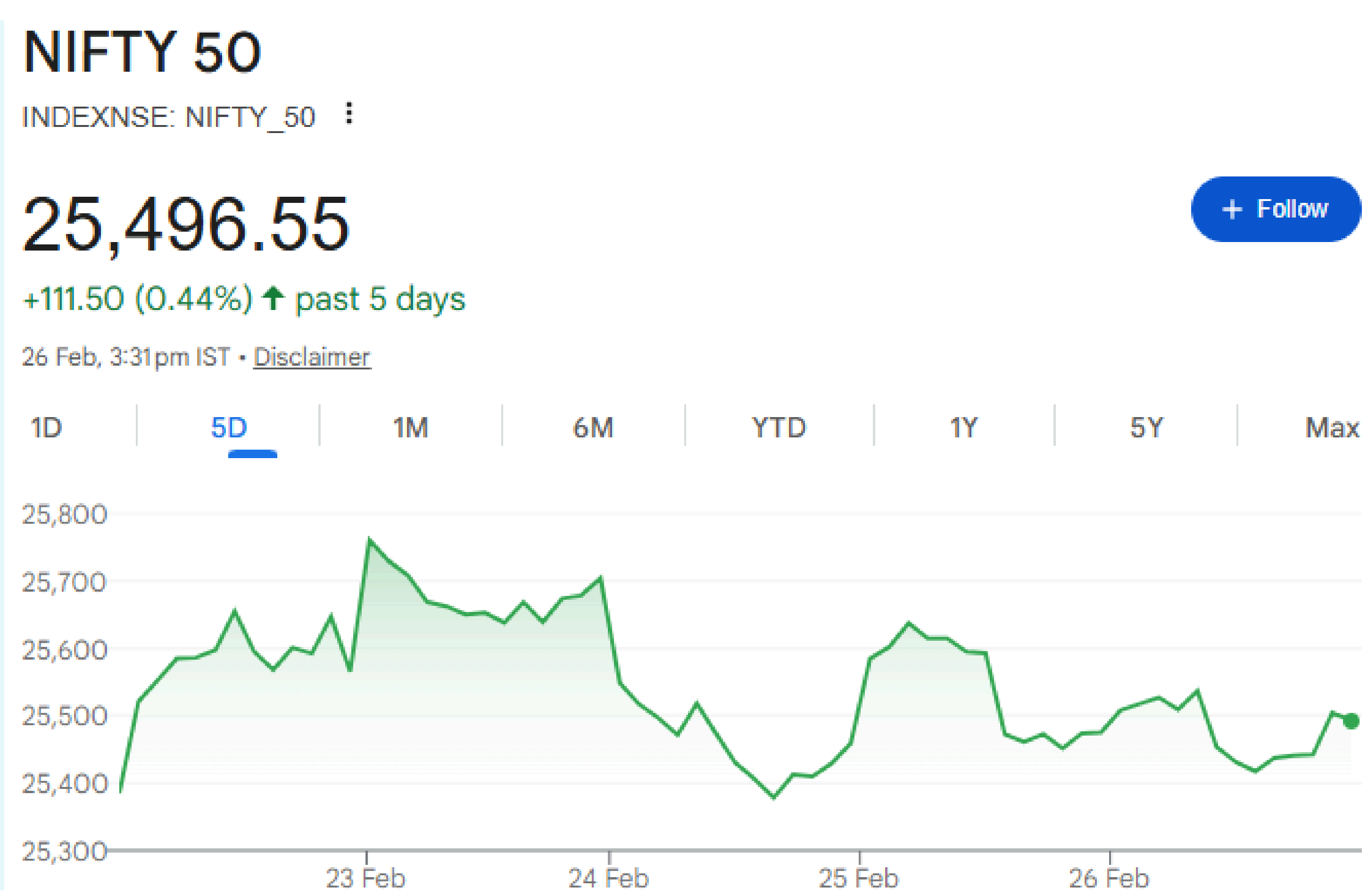
20th Feb, 2026 to 26th Feb, 2026

MARKET OVERVIEW

Elevated Volatility Amid Crude Surge, Geopolitical Tensions, and Renewed Tariff Uncertainty

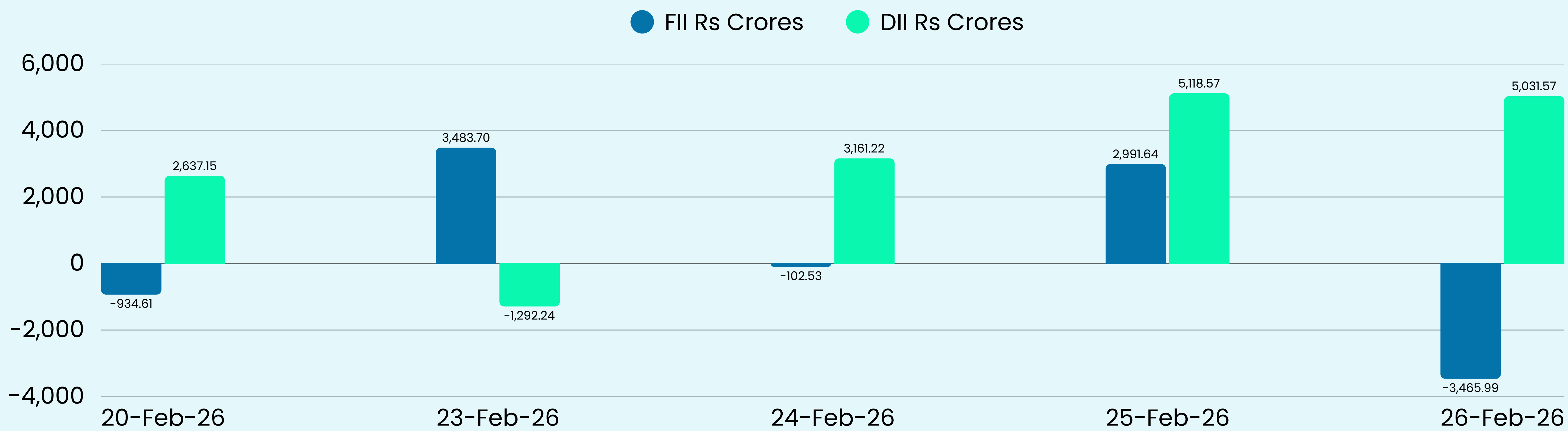
- Indian equities witnessed sharp losses as a spike in crude oil prices and escalating geopolitical tensions, including U.S.–Iran uncertainties and stalled sanctions talks, triggered profit booking.
- Markets saw a modest rebound supported by selective buying after the previous session's steep correction driven by oil price surge and global risk-off sentiment.
- Sentiment improved on positive global cues after the U.S. Supreme Court struck down reciprocal tariffs, raising hopes of easing trade tensions despite lingering sectoral pressure.
- Concerns over potential tariff actions, rising U.S. protectionist stance, and fears of disruptions to existing trade agreements weighed on markets, keeping investor sentiment fragile.
- Additional drag from global technology weakness and domestic liquidity absorption, including IPO activity, limited upside momentum even during recovery phases.

As a result, the BSE Sensex was down by 0.50%, closing at 82,248.61 , while the Nifty 50 was up by 0.44%, settling at 25,496.55.



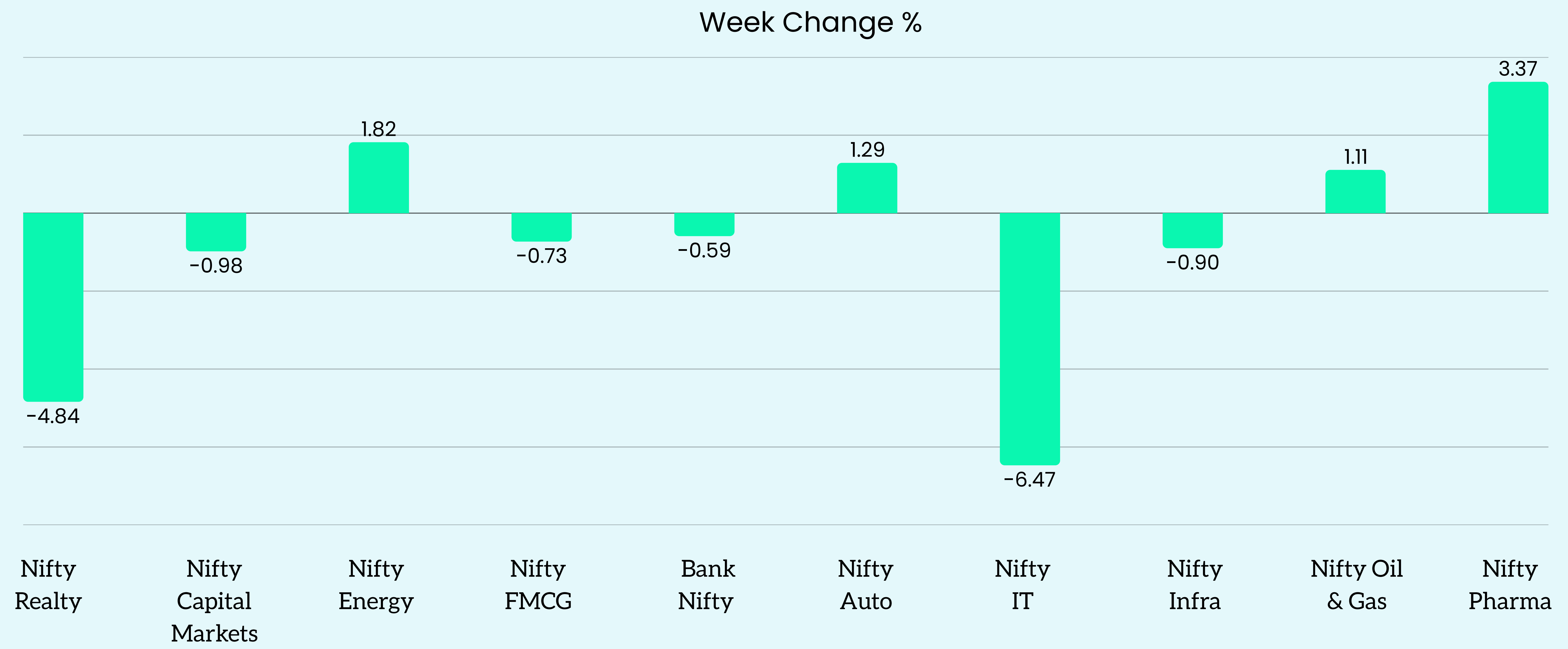
INSTITUTIONAL INVESTMENT TRENDS

- FII showed high volatility but ended with a net inflow of ~₹1,972 crore over the period.
- DII maintained strong buying throughout, recording a solid net inflow of ~₹14,656 crore.



SECTORAL HIGHLIGHTS

- Nifty Pharma emerged as the top performer with a strong ~3.37% weekly gain, indicating defensive buying interest.
- Nifty Energy also outperformed with a ~1.82% rise, supported by strength in oil & gas counters.
- Nifty IT was the worst hit, plunging ~6.47%, reflecting heavy selling pressure in technology stocks.
- Nifty Realty declined sharply by ~4.84%, making it the second worst performer amid sectoral weakness.

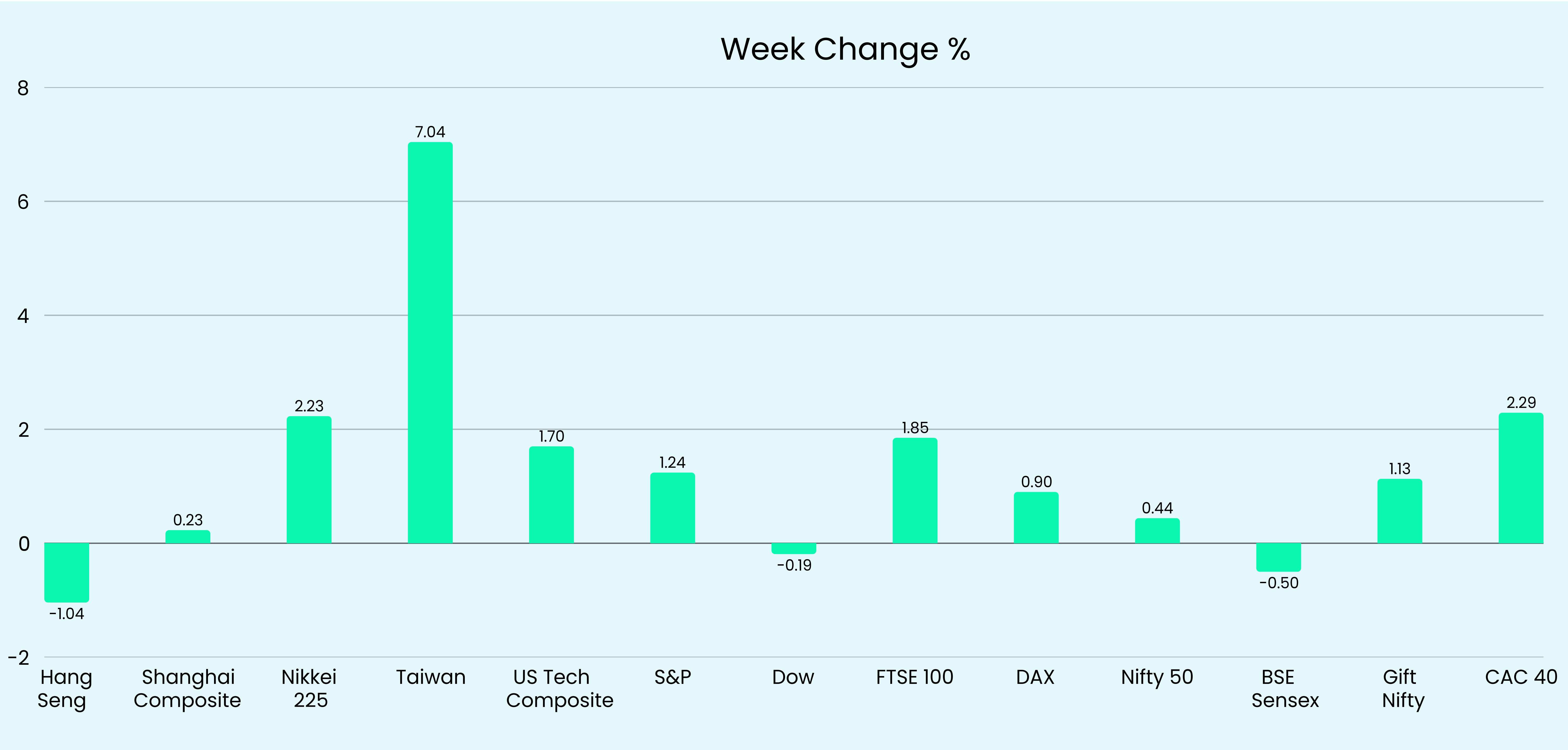


KEY MACRO ECONOMIC DATA (INDIA)

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	25 - Feb	6.68%

GLOBAL EQUITY MARKET OVERVIEW

- Taiwan index was the top performer with a strong ~7.04% weekly surge, significantly outperforming global peers.
- Nikkei 225 gained ~2.23%, marking it among the best performing major Asian indices.
- Hang Seng was the worst performer, declining ~1.04% during the week.
- BSE Sensex also ended in the red, slipping ~0.50% and underperforming most global markets.



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