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WEEKLY MARKET UPDATE

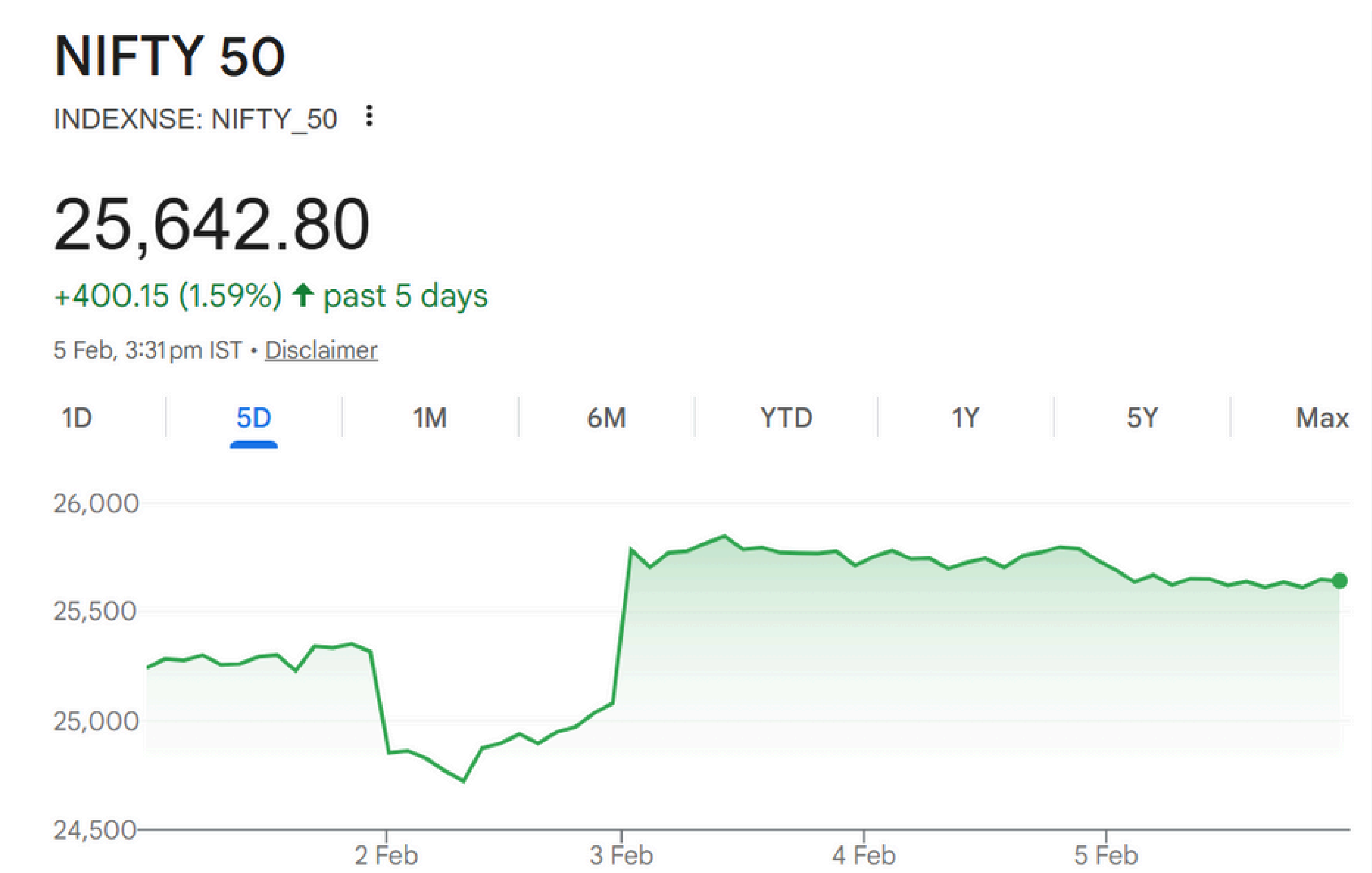
23rd Jan, 2026 to 29th Jan, 2026

MARKET OVERVIEW

Indian Equity Markets Navigate Volatility Amid Policy, Global, and Sectoral Developments

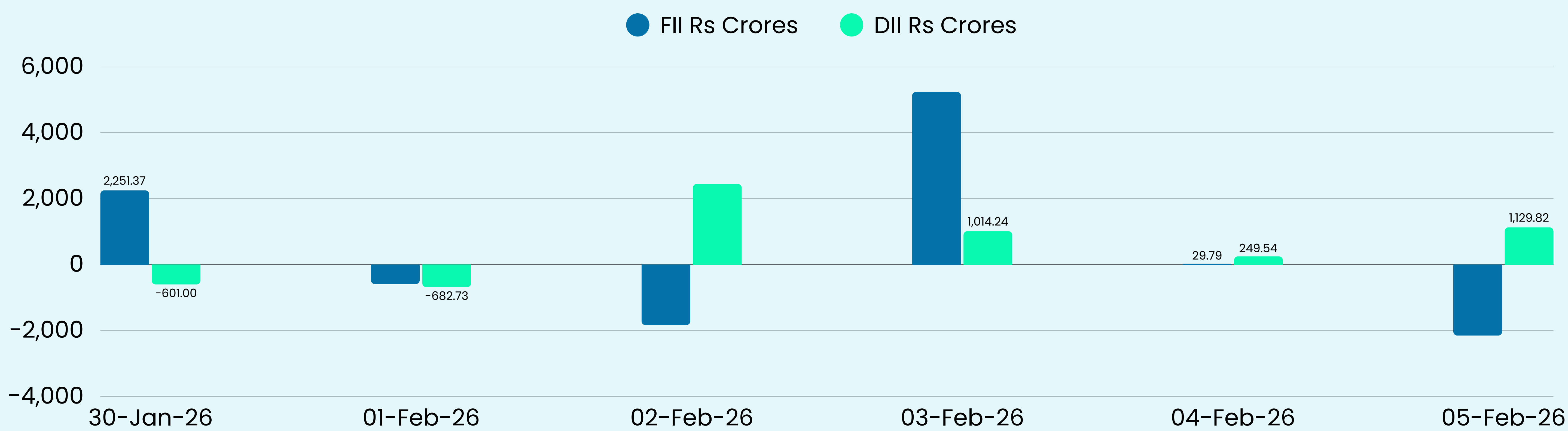
- Markets saw mixed movement, influenced by macro optimism from the Economic Survey and intermittent profit booking.
- Sentiment weakened ahead of the Union Budget amid geopolitical risks, FII selling, and rupee pressure.
- Equities recovered after initial budget-related disappointment, supported by buying in select large-cap and infrastructure stocks.
- A sharp rally followed the announcement of a U.S.–India trade agreement easing tariff concerns.
- Falling crude oil prices and a stronger rupee supported overall market sentiment.
- Export-driven Gains were limited by persistent selling in IT stocks due to concerns over AI-led business disruption.

As a result, the BSE Sensex up by 1.39%, closing at 83,313.93 , while the Nifty 50 up by 1.59%, settling at 25,642.80.



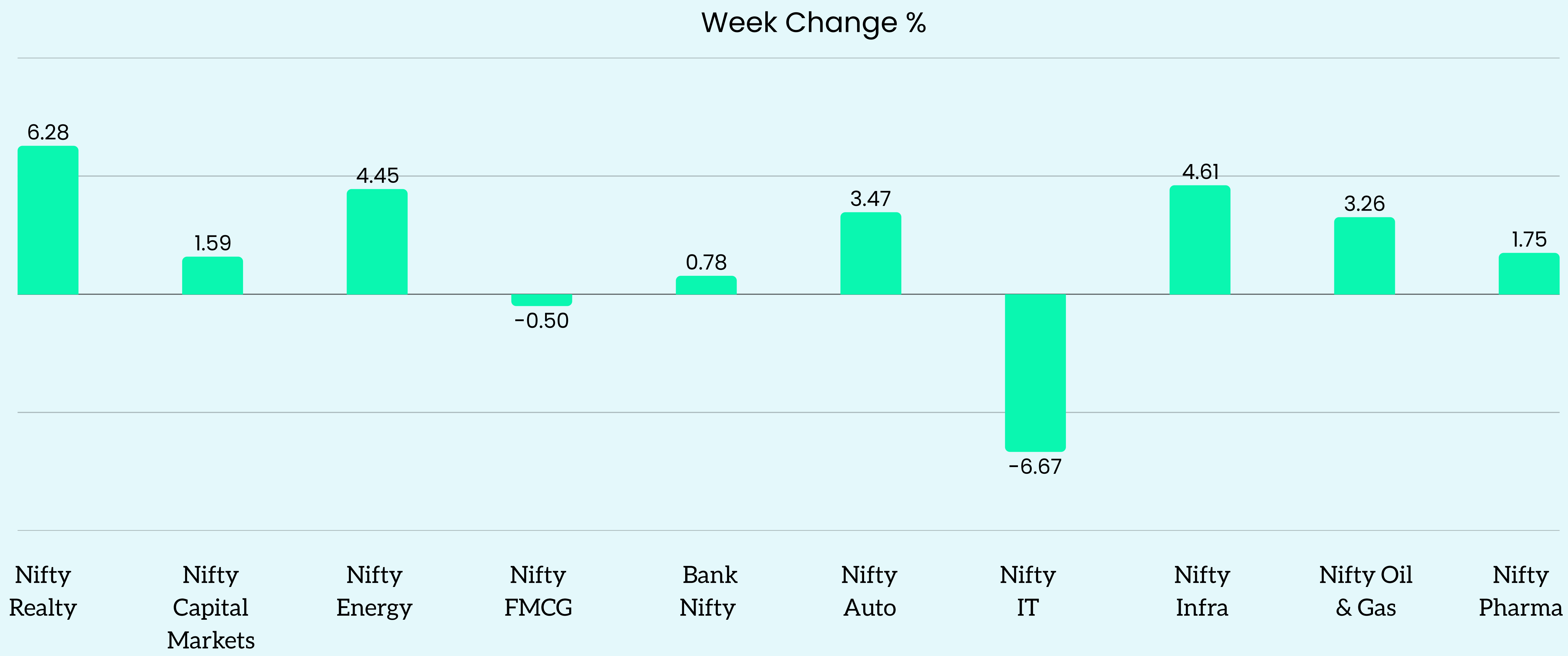
INSTITUTIONAL INVESTMENT TRENDS

- FIIs recorded a net inflow of ₹2,946.13 crore, indicating a shift from continued foreign selling pressure.
- DIIs posted a net inflow of ₹3,556.2 crore, providing strong domestic support to the equity markets.



SECTORAL HIGHLIGHTS

- Realty led the rally with strong weekly momentum (+6.28%), showing clear sectoral outperformance.
- Infrastructure followed closely (+4.61%), indicating renewed interest in capex-linked themes.
- IT was the weakest performer (-6.67%), facing heavy selling pressure during the week.
- FMCG slightly declined (-0.50%), underperforming despite its otherwise defensive nature.

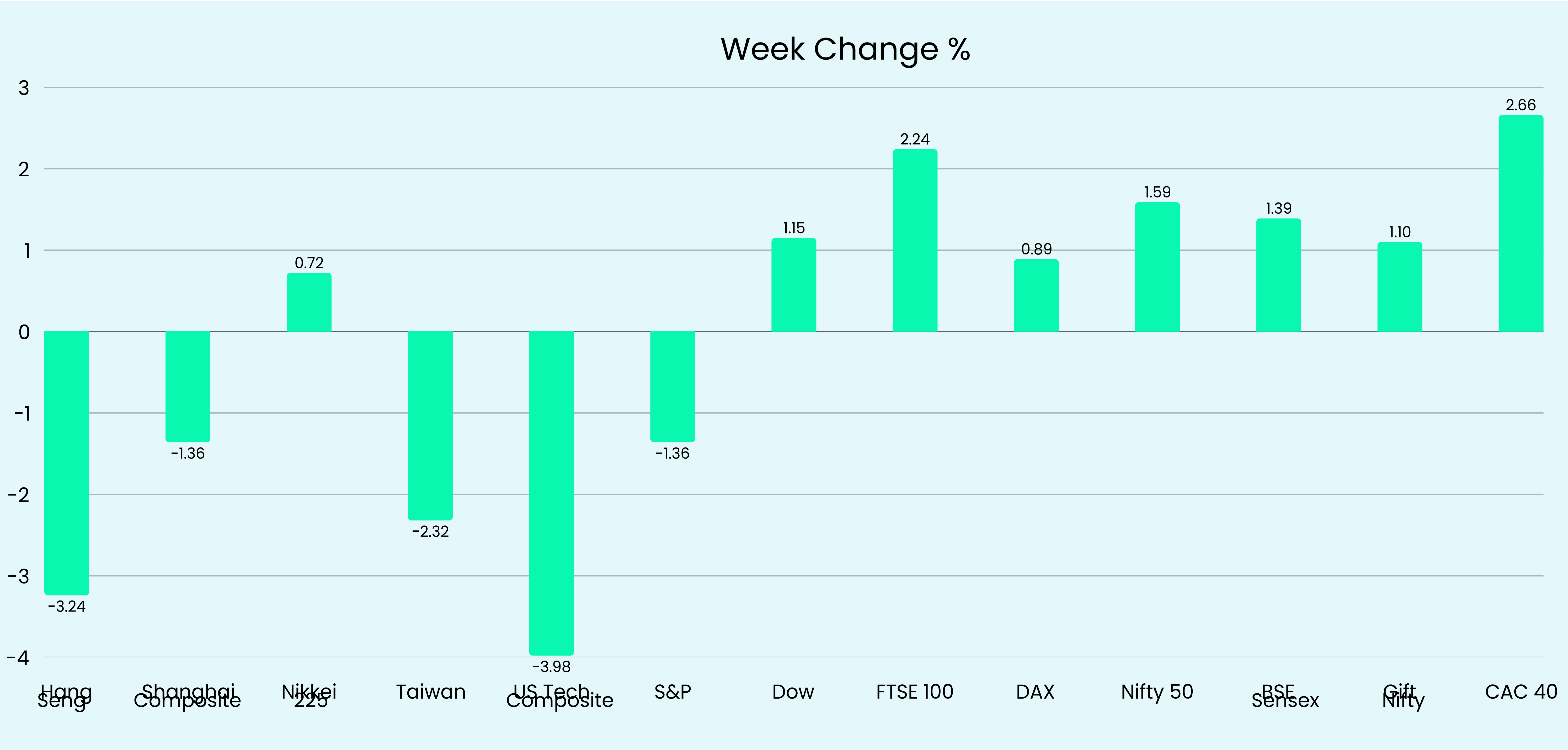


KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE	Monthly	Dec-2025	1.33%
INTEREST RATE	Daily	15- Dec	5.25%
UNEMPLOYMENT RATE	Monthly	Dec-2025	4.80%
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	04- Feb	6.71%

GLOBAL EQUITY MARKET OVERVIEW

- HCAC 40 topped the chart with a strong ~2.66% weekly gain, showing clear European market strength.
- FTSE 100 followed closely, rising ~2.24%, supported by broad-based buying.
- US Tech Composite was the worst performer, falling sharply by ~3.98% due to tech-led selling pressure.
- Hang Seng also underperformed, down ~3.24%, reflecting continued weakness in Chinese equities.



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