INGENETUS

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AMFI REGISTERED MUTUAL FUND DISTRIBUTOR & SIF DISTRIBUTOR
APMI REGISTERED PMS DISTRIBUTOR (APRN)

MONTHLY MARKET UPDATE

1st Sep, 2026 to 30th Sep, 2026

MARKET OVERVIEW

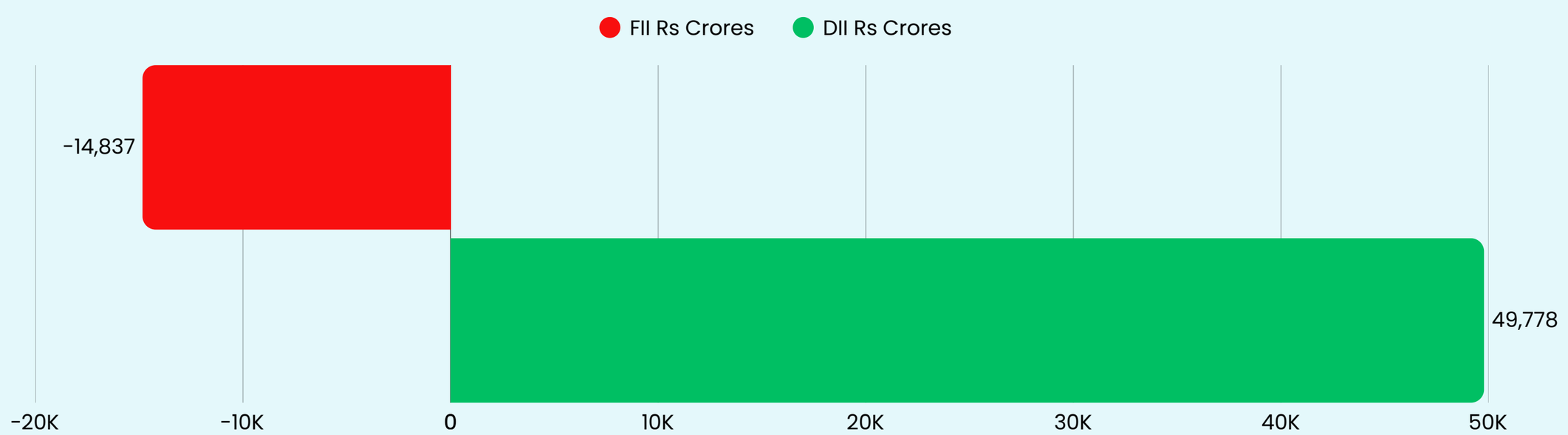
September Storm: Oil, the Fed and a Record-Low Rupee Shake Dalal Street

- Indian equities suffered their worst month of the year, with the Nifty and Sensex sliding around 5.7% to near six-month lows.
- Sentiment was battered by the US Fed's first rate hike since 2023, Brent crude holding above $100 on Strait of Hormuz tensions, and the rupee slipping past a record 96 per dollar.
- Despite the turmoil, strong domestic inflows and a robust 7.8% Q1 GDP print offered a silver lining and cushioned the broader fall.
- Global bond yields stayed elevated, with the US 30-year Treasury near multi-decade highs, keeping pressure on equities worldwide.

INDEX	MONTHLY RETURN	CLOSING PRICE
Nifty 50	-6.43%	22,620
BSE Sensex	-6.19%	72,480
Nifty 500	-6.19%	22,072
Nifty Midcap 150	-6.98%	21,867
Nifty Smallcap 250	-3.77%	17,798

INSTITUTIONAL INVESTMENT TRENDS

- FIIs were net sellers with a heavy outflow of ₹14,837 crore, reflecting sustained foreign selling pressure.
- DIIs were net buyers with a strong inflow of ₹49,778 crore, underscoring robust domestic institutional support.



SECTORAL HIGHLIGHTS

- Telecommunication (+7.56%) and Hardware Technology (+6.51%) led the gains, standing out in a broadly weak market.
- Diversified (-9.03%) and Software & Services (-8.60%) were the biggest laggards, dragging sentiment sharply lower.

Telecom-munication 7.56%	Hardware Technology 6.51%	Media 5.77%	Transport 0.81%	Hotels & Restaurants -0.98%	Pharma -1.09%
Textiles & Apparel -1.47%	Diversified Consumer -2.00%	Cement & Construction -2.23%	General Industrials -2.45%	Commercial Services -2.52%	Utilities -3.15%
Retailing -3.20%	Others -3.24%	Food, Bev. & Tobacco -3.44%	Metals & Mining -3.45%	Chemicals & Petrochem. -3.73%	Realty -3.95%
Forest Materials -5.01%	FMCG -5.29%	Oil & Gas -5.72%	Consumer Durables -5.77%	Healthcare -6.01%	Fertilizers -6.05%
Banking & Finance -6.10%	Automobiles & Auto Comp. -6.50%	Telecom Services -6.87%	Software & Services -8.60%	Diversified -9.03%	

KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Aug- 2026	4.82%
INTEREST RATE	Daily	05 - Aug	5.25%
UNEMPLOYMENT RATE	Monthly	Aug-2026	5.00%
GDP	Yearly	2025	$3.8 Trillion
GDP Annual GROWTH RATE	Quarterly	June-2026	7.80%
GDP PER CAPITA	Yearly	2025	$2523
10-YEAR GOVERNMENT BOND YIELD	Daily	Sep- 2026	7.17%

GLOBAL EQUITY MARKET OVERVIEW

- S&P 500 (-0.35%) and FTSE 100 (-1.01%) held up best, limiting their losses in a broad sell-off.
- Hang Seng (-4.38%) and Dow Jones (-3.87%) were the weakest performers, leading a sharp global decline.

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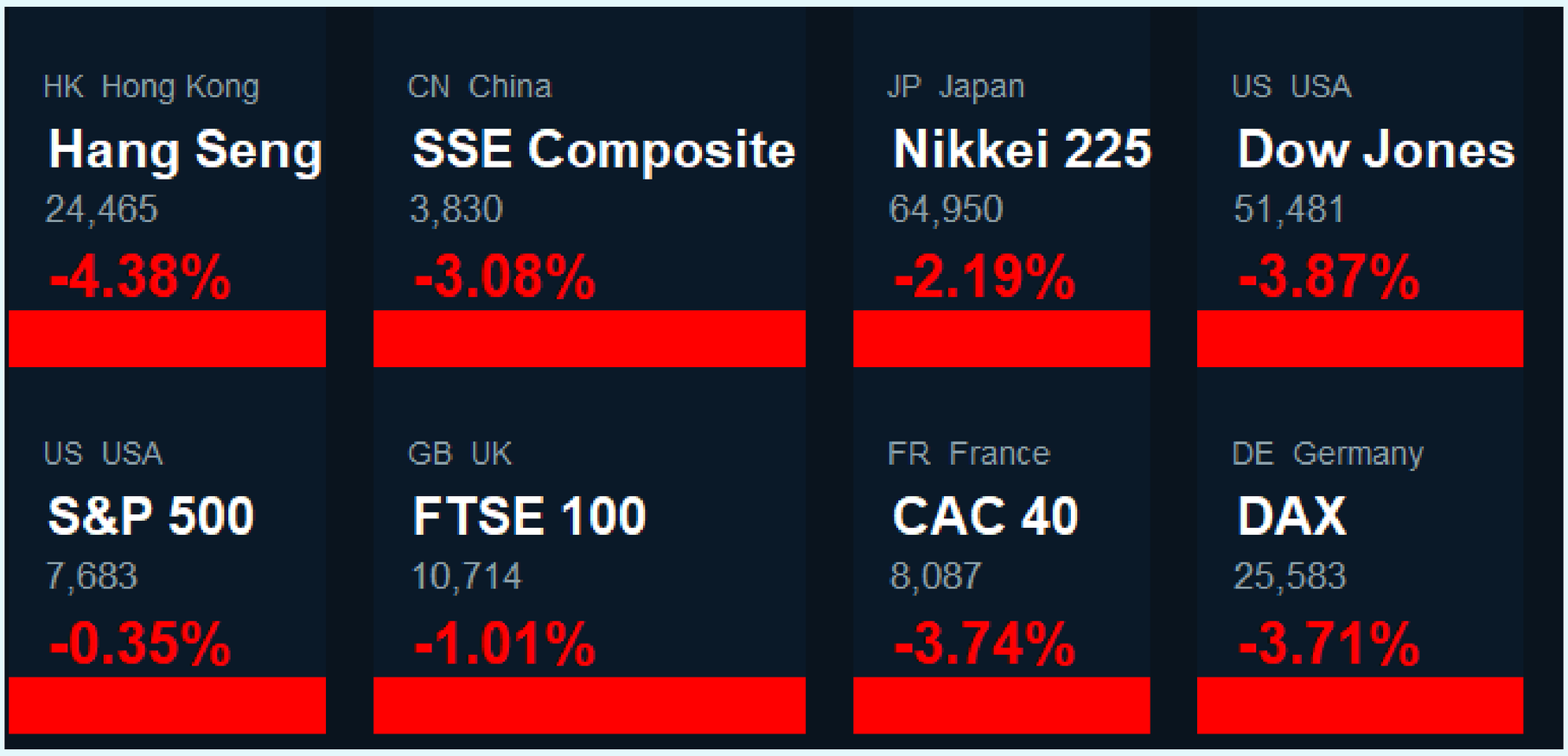

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