INGENETUS

WEEKLY MARKET UPDATE

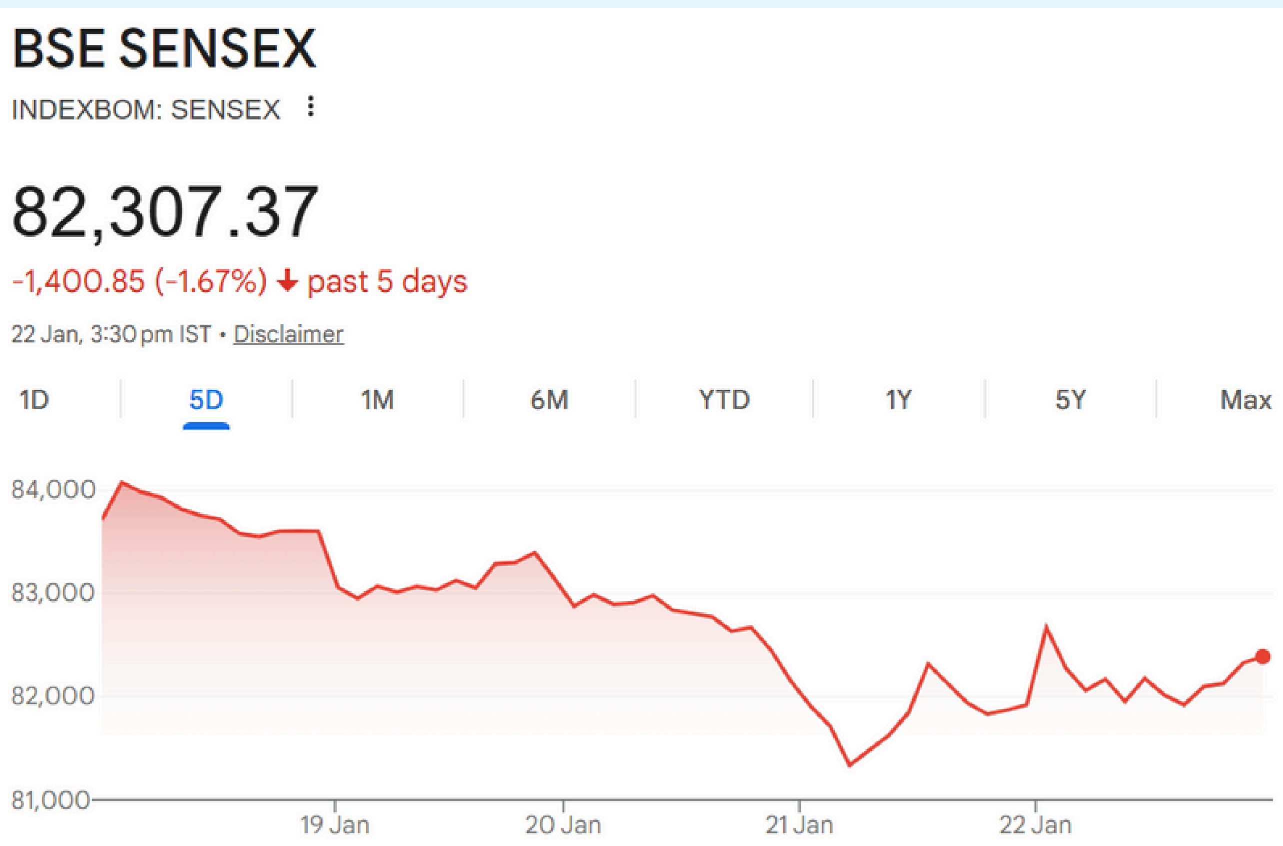
16th Jan, 2026 to 22nd Jan, 2026

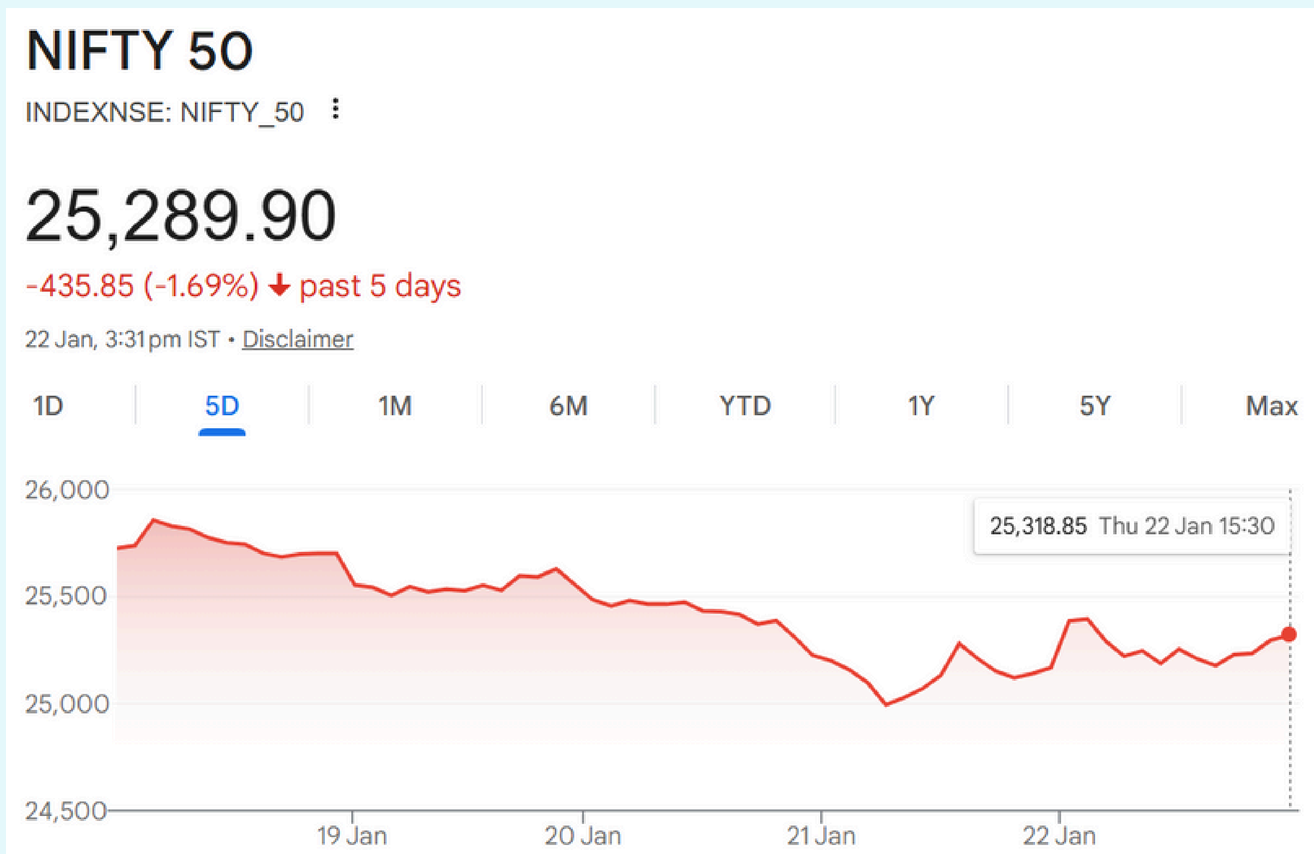
MARKET OVERVIEW

Geopolitical Tensions and Tariff Concerns Keep Indian Markets on Edge

- Indian equity markets stayed volatile amid foreign fund outflows, valuation concerns, and geopolitical pressures.
- Global sentiment weakened due to uncertainty around U.S. trade policies and renewed tariff threats.
- Rising bond yields and geopolitical rhetoric increased risk aversion across markets.
- Domestic cues were mixed, with a rise in wholesale inflation but a stronger FY26 growth outlook from the IMF
- IT stocks outperformed on better earnings and improved growth guidance, while broader earnings stayed mixed
- Markets found limited support from easing crude prices and progress on the India–EU free trade agreement.

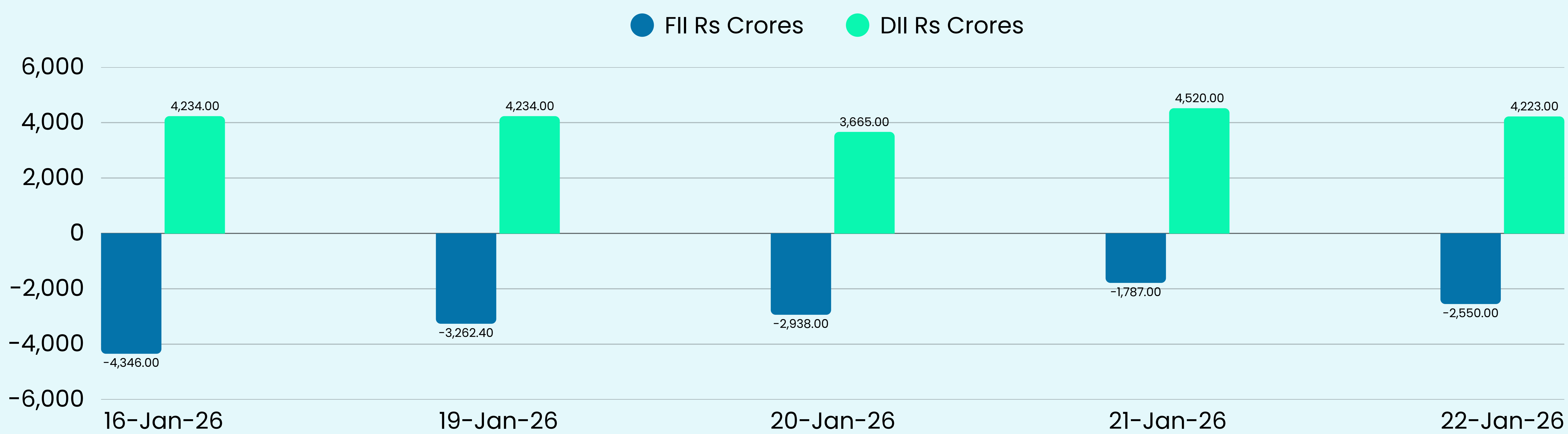
As a result, the BSE Sensex down by 1.67%, closing at 82,307.71 , while the Nifty 50 down by 1.69%, settling at 25,289





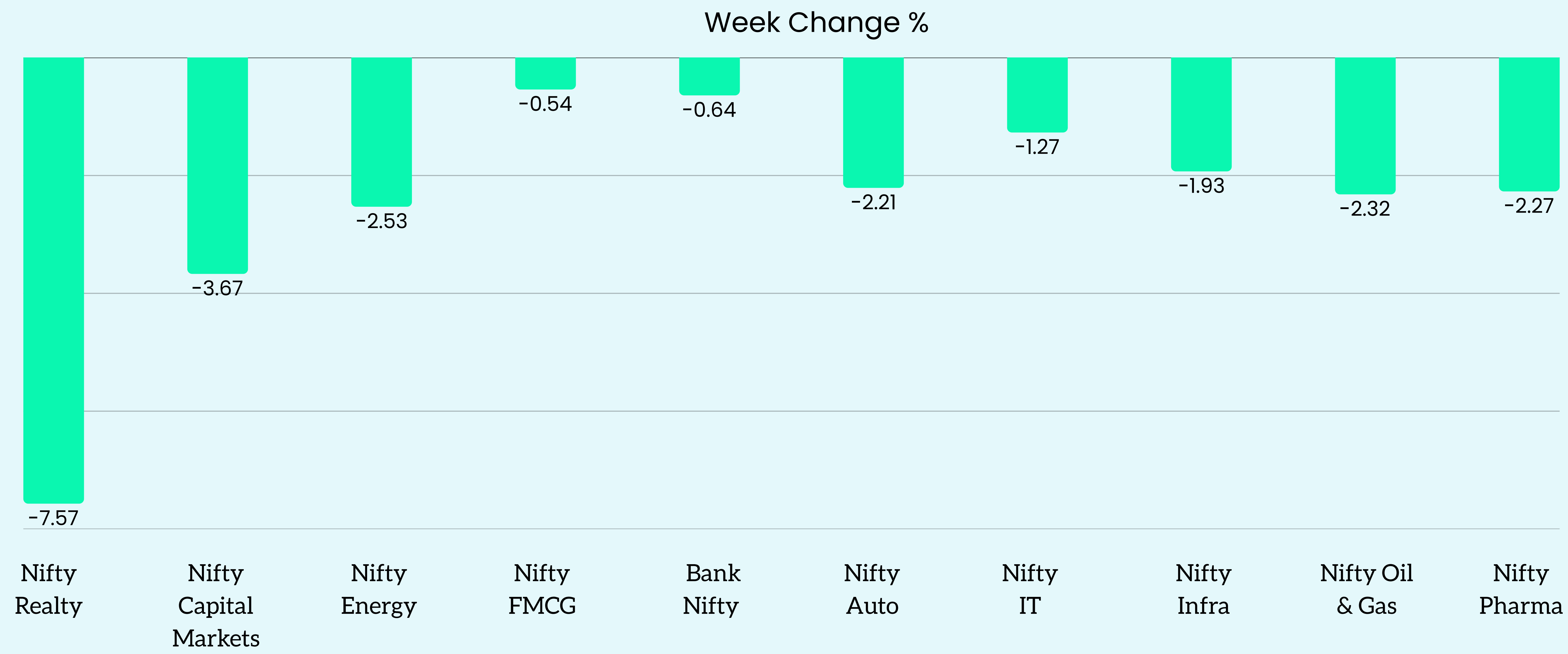
INSTITUTIONAL INVESTMENT TRENDS

- FIIs recorded a net outflow of ₹14,883 crore, indicating sustained and heavy foreign selling pressure.
- DIIs saw a net inflow of ₹20,876 crore, consistently supporting the market amid volatility.



SECTORAL HIGHLIGHTS

- Nifty Capital Markets emerged as the best performer with a marginal weekly decline of 0.47%, showing relative resilience amid broad market weakness.
- Bank Nifty also outperformed most sectors, limiting losses to 0.68%, supported by comparatively stable banking stocks.
- Nifty Realty was the worst performer, plunging 6.57% over the week, reflecting sharp selling pressure in real estate stocks.
- Nifty Auto saw heavy weakness with a decline of 3.38%, indicating subdued sentiment in the auto sector.

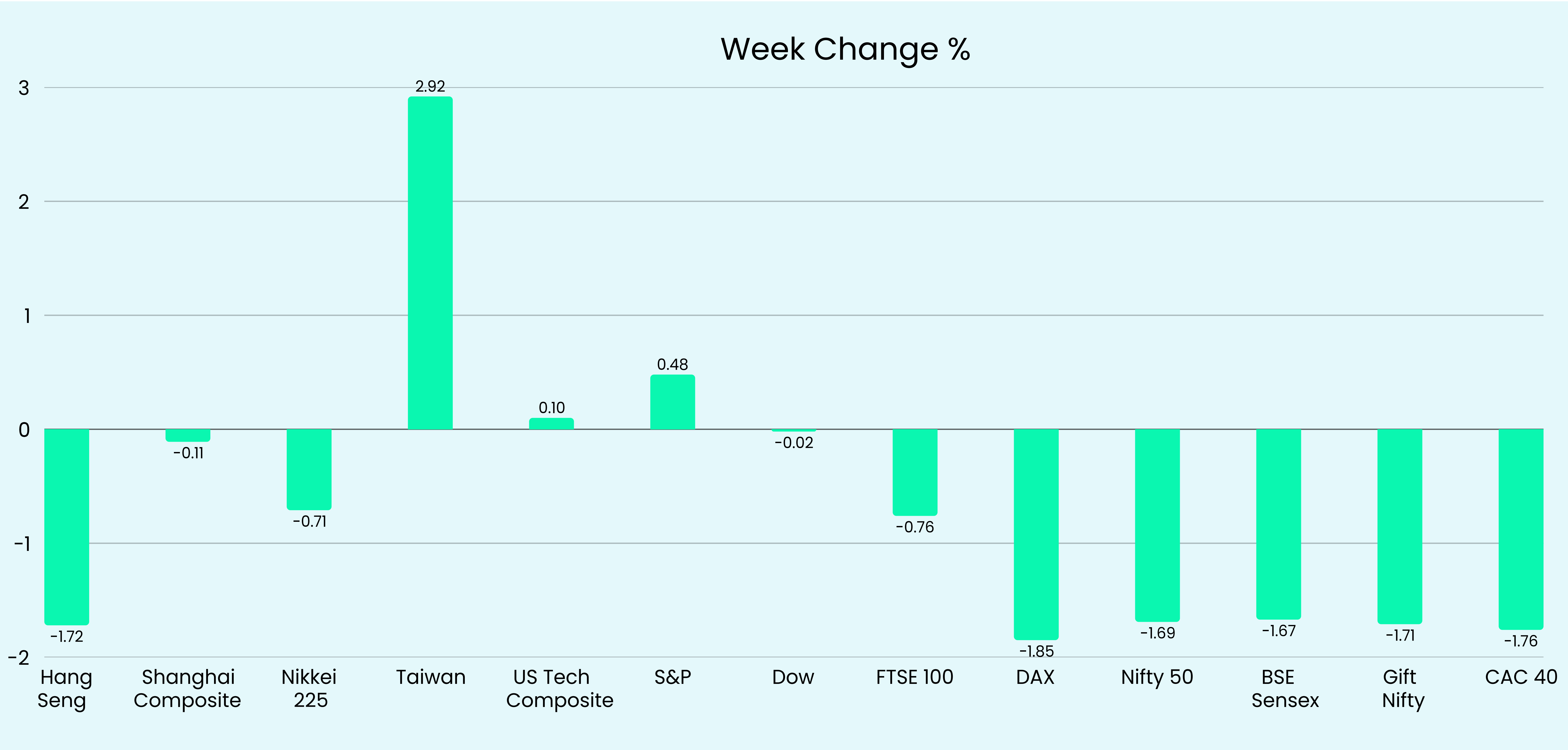


KEY MACRO ECONOMIC DATA (INDIA)

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	Oct-2025	₹ 26,25,619 Crore
10-YEAR GOVERNMENT BOND YIELD	Daily	22 Jan	6.67%

GLOBAL EQUITY MARKET OVERVIEW

- Nikkei 225 emerged as the best performer with a strong weekly gain of 4.52%, reflecting robust momentum in Japanese equities.
- Hang Seng also outperformed global peers, rising 2.48% over the week on improved investor sentiment.
- BSE Sensex was the weakest performer, declining 1.01%, indicating continued pressure in Indian equities.
- Nifty 50 also underperformed with a weekly fall of 0.68%, lagging behind most global indices.



Website: www.ingenetus.com **| Email:** information@ingenetus.com
Toll-Free Number: 1800 202 3772 **| Contact No.:** +91-9266207888
Address: 596, Level-5, Vegas Mall, Pocket 1, Sector-14, Dwarka, New Delhi, Delhi-110078