

# WEEKLY MARKET UPDATE

27th Feb, 2026 to 05th Mar, 2026

## MARKET OVERVIEW

### Geopolitical Escalation and Crude Oil Surge Trigger Broad Market Weakness

- Indian equity markets remained under pressure amid rising geopolitical tensions in the Middle East and uncertainty around global trade dynamics.
- Markets declined sharply after diplomatic talks between the U.S. and Iran regarding Tehran's nuclear program ended without any agreement.
- Rising conflict risks triggered a surge in crude oil prices, increasing volatility across global financial markets.
- The sharp jump in crude prices raised concerns over inflation and India's external balance, given the country imports nearly 85% of its oil requirements.
- Additional uncertainty emerged from potential disruptions to Gulf shipping routes and the Strait of Hormuz, a key passage for a significant share of global crude oil supply.

As a result, the BSE Sensex was down by 2.85%, closing at 80,015.90, while the Nifty 50 was down by 2.36%, settling at 24,765.90.

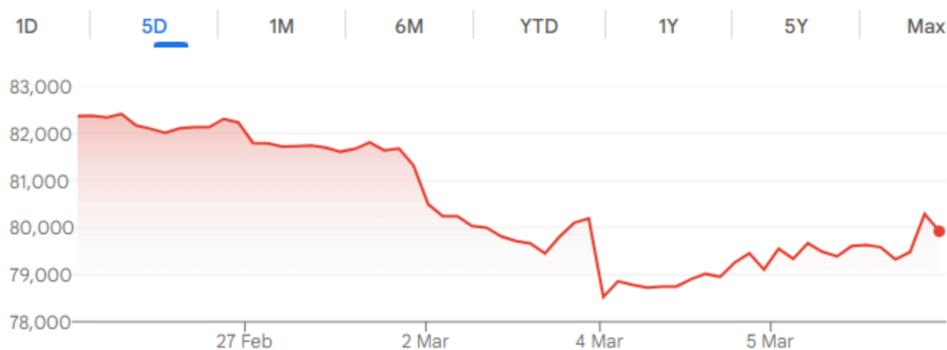
#### BSE SENSEX

INDEXBOM: SENSEX

80,015.90

-2,347.96 (-2.85%) ↓ past 5 days

5 Mar, 3:30 pm IST • Disclaimer



#### NIFTY 50

INDEXNSE: NIFTY\_50

24,765.90

-598.50 (-2.36%) ↓ past 5 days

5 Mar, 3:31 pm IST • Disclaimer



## INSTITUTIONAL INVESTMENT TRENDS

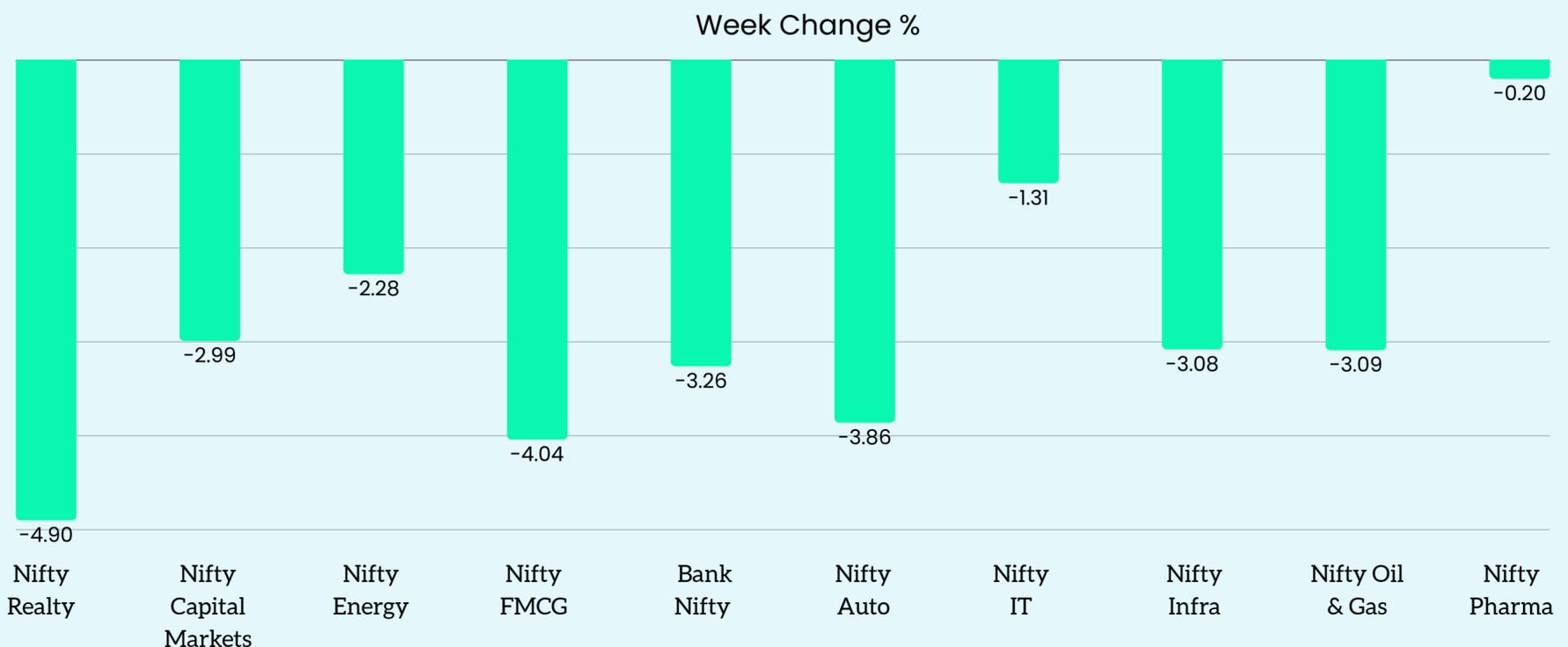
- FII showed high volatility but ended with a net outflow of ₹23,337 Cr over the period.
- DII maintained strong buying throughout, recording a solid net inflow of ₹38,108 Cr.

● FII Rs Crores ● DII Rs Crores



## SECTORAL HIGHLIGHTS

- Nifty Pharma emerged as the most resilient sector, posting a marginal decline of just 0.20%, indicating relative defensive strength amid broader market weakness.
- Nifty IT limited losses to 1.31%, outperforming most sectors as investors gravitated toward relatively stable export-oriented companies.
- Nifty Realty was the worst-performing sector, falling 4.90%, reflecting heightened sensitivity to rising interest rate concerns and weak sentiment.
- Nifty FMCG declined 4.04%, as profit booking and concerns over demand outlook weighed on consumer-focused stocks

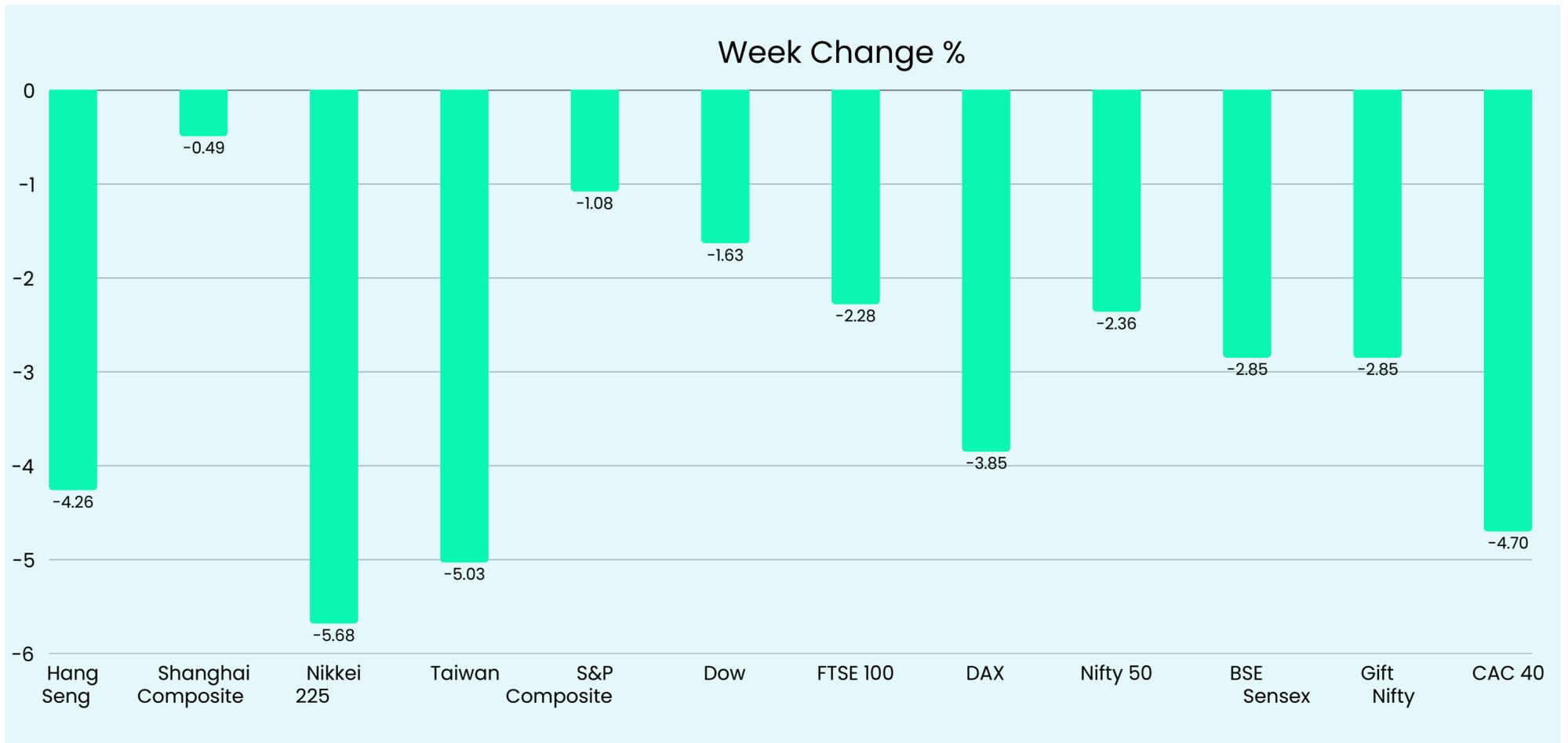


## KEY MACRO ECONOMIC DATA (INDIA)

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	24 - Mar	6.71%

## GLOBAL EQUITY MARKET OVERVIEW

- Shanghai Composite was the most resilient global index, declining just 0.49%, indicating relatively stable market sentiment in China.
- S&P Composite also showed relative strength with a limited decline of 1.08%, outperforming most global peers during the week.
- Nikkei 225 emerged as the worst performer, falling 5.68%, reflecting sharp risk-off sentiment across Japanese equities.
- Taiwan Index declined 5.03%, making it the second worst performer amid broader weakness in Asian markets.



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