

WEEKLY MARKET UPDATE

23rd Jan, 2026 to 29th Jan, 2026

MARKET OVERVIEW

Markets in Focus: Global Signals, FII Flows and the India–EU FTA

- Indian equity markets rebounded on easing EU–U.S. tensions and improved global sentiment, snapping a short losing streak.
- Hopes of a trade framework reduced immediate tariff concerns, but persistent FII outflows kept market volatility elevated.
- Equities slipped as the rupee touched record lows amid geopolitical uncertainty, valuation worries, and continued foreign selling.
- Sentiment showed signs of stability as global markets reacted positively to reduced tariff-related risks despite domestic headwinds.
- Markets gained momentum after India and the European Union announced a landmark free trade agreement aimed at boosting bilateral trade.
- Export-driven and labor-intensive sectors benefited from FTA optimism, supported further by a softer U.S. dollar globally.

As a result, the BSE Sensex down by 0.12%, closing at 82,566.37 , while the Nifty 50 up by 0.13%, settling at 25,418.90

BSE SENSEX

INDEXBOM: SENSEX

82,566.37

-101.34 (-0.12%) ↓ past 5 days

29 Jan, 3:30 pm IST • [Disclaimer](#)



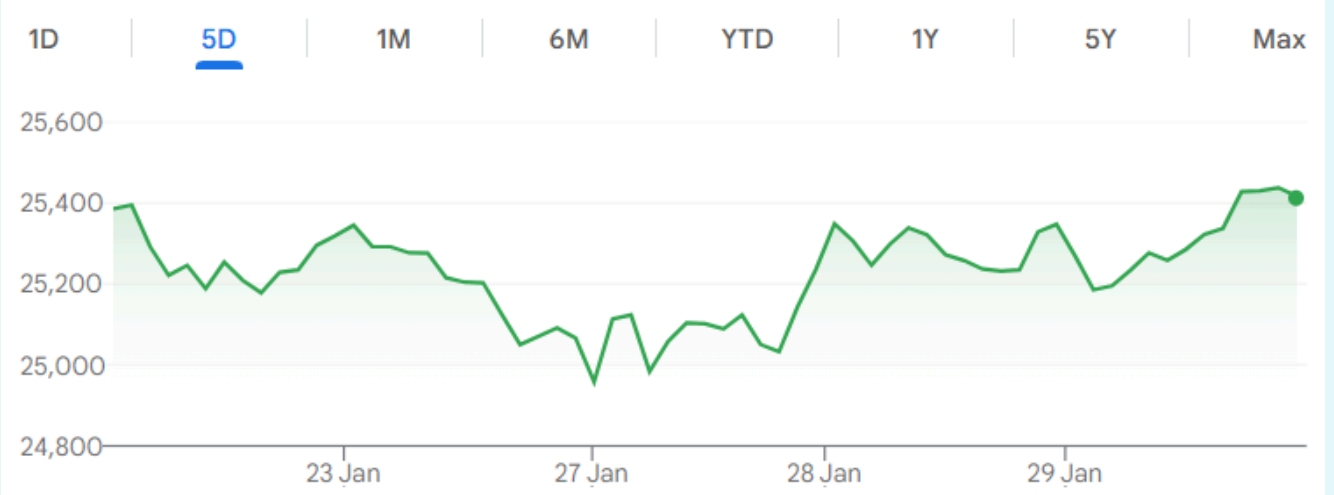
NIFTY 50

INDEXNSE: NIFTY_50

25,418.90

+32.75 (0.13%) ↑ past 5 days

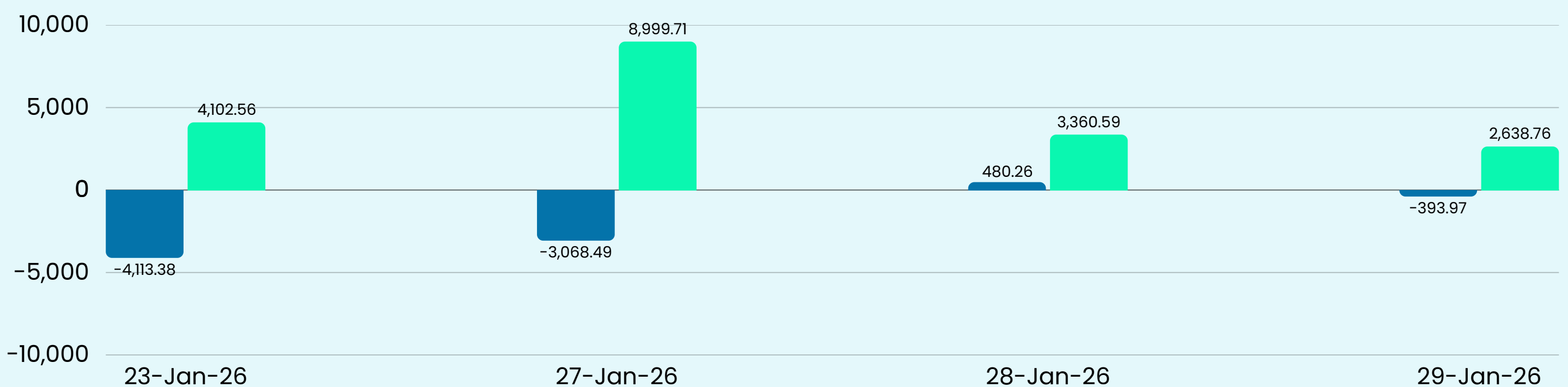
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INSTITUTIONAL INVESTMENT TRENDS

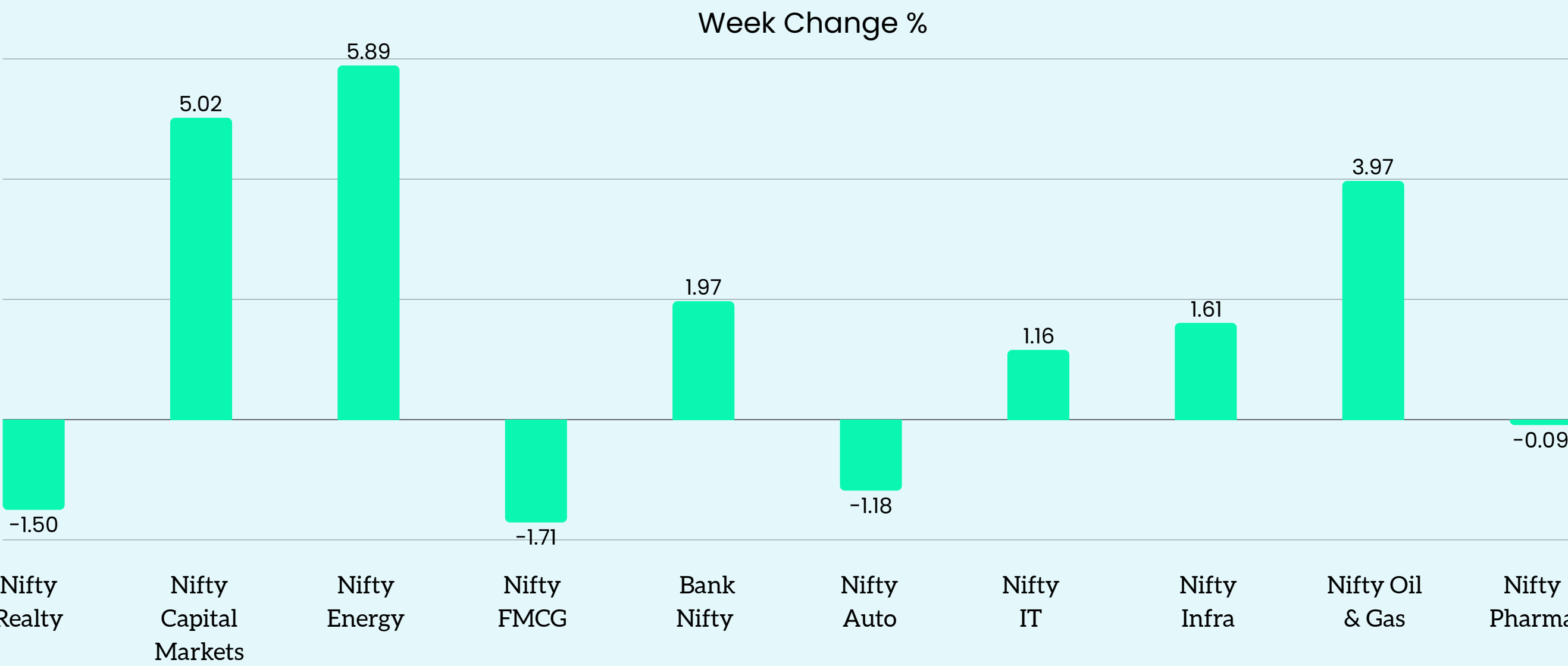
- FIIs recorded a net outflow of ₹7,096 crore, indicating continued foreign selling pressure during the period.
- DIIs posted a net inflow of ₹19,102 crore, providing strong domestic support to the equity markets.

● FII Rs Crores ● DII Rs Crores



SECTORAL HIGHLIGHTS

- Nifty Energy emerged as the top performer with strong weekly gains of around 5.9%, supported by strength in energy and commodity-linked stocks.
- Nifty Capital Markets also outperformed, rising about 5.0% on improved sentiment and expectations of higher market activity.
- Nifty FMCG was the weakest performer, declining nearly 1.7% due to valuation concerns and defensive profit booking.
- Nifty Realty also underperformed, slipping around 1.5% amid sector-specific pressure and subdued demand outlook.

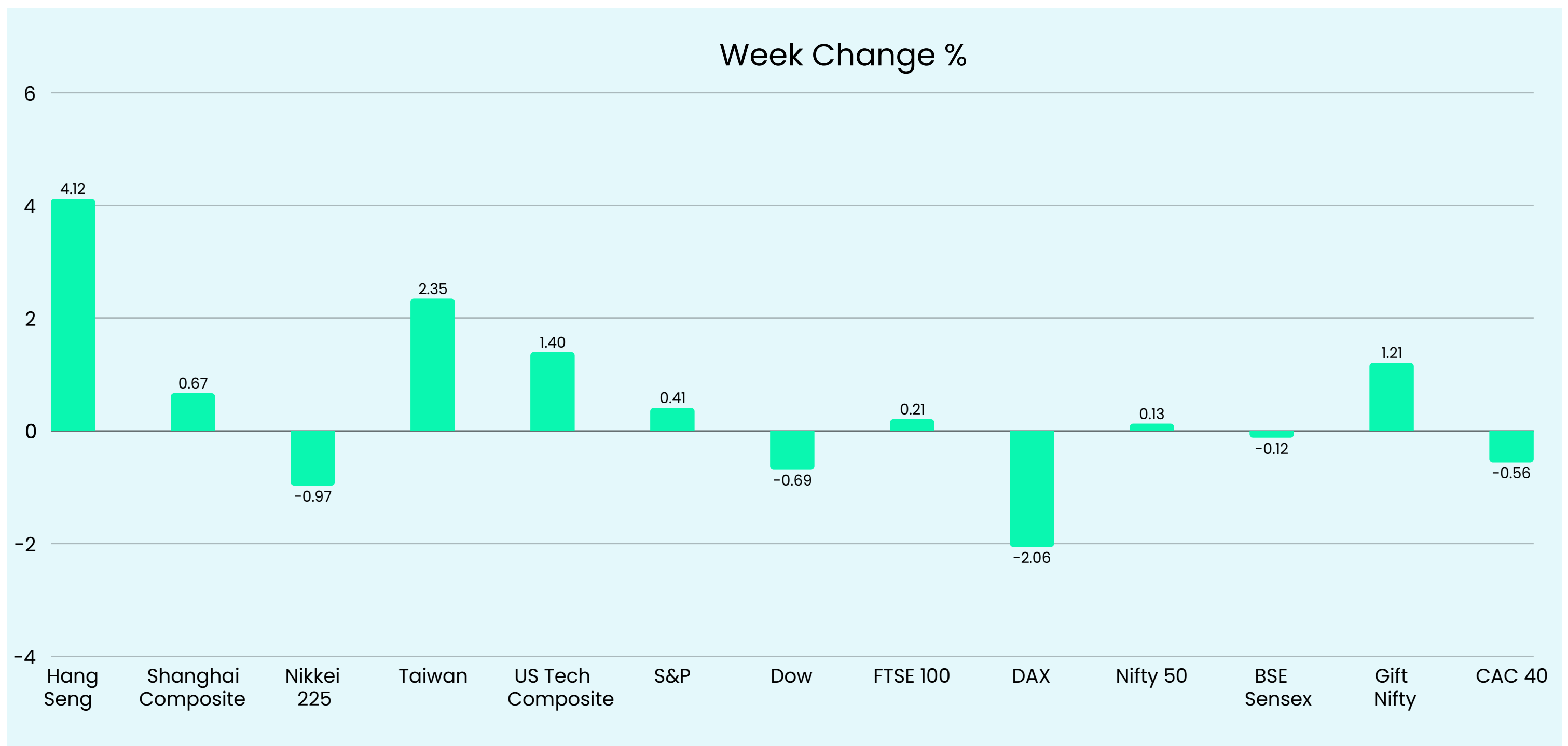


KEY MACRO ECONOMIC DATA (INDIA)

| 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 | Nov-2025 | ₹ 29,25,910 Crore |
| 10-YEAR GOVERNMENT BOND YIELD | Daily | 22 Jan | 6.67% |

GLOBAL EQUITY MARKET OVERVIEW

- Hang Seng led global markets with strong gains of about 4.1%, driven by sharp buying interest in Asian equities.
- Taiwan index also outperformed, rising nearly 2.4% on strength in technology and export-oriented stocks.
- DAX was the weakest performer, falling around 2.1% amid European market pressure and risk-off sentiment.
- Nikkei 225 underperformed as well, declining close to 1.0% due to profit booking and yen-related concerns.



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