

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

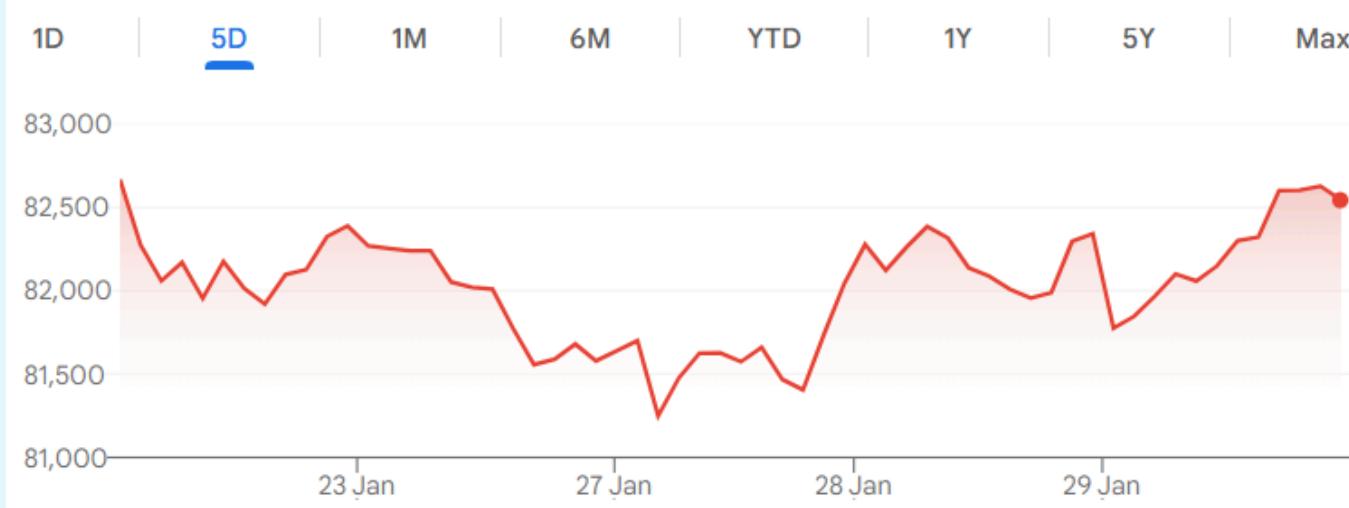
INDEXBOM: SENSEX :

82,566.37

-101.34 (-0.12%) ↓ past 5 days

29 Jan, 3:30 pm IST • Disclaimer

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NIFTY 50

INDEXNSE: NIFTY_50 :

25,418.90

+32.75 (0.13%) ↑ past 5 days

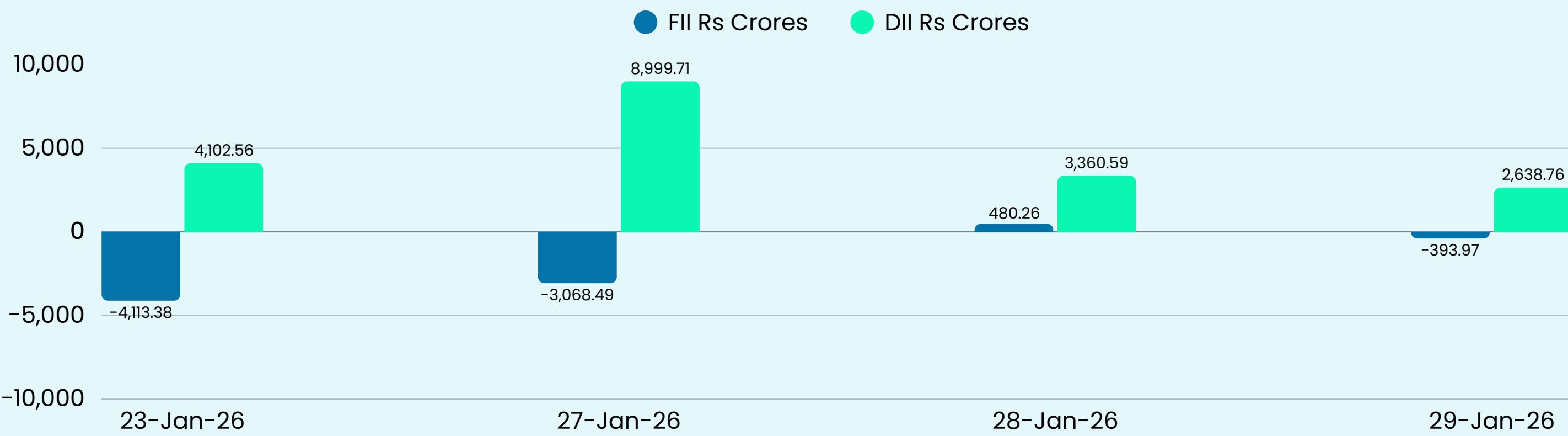
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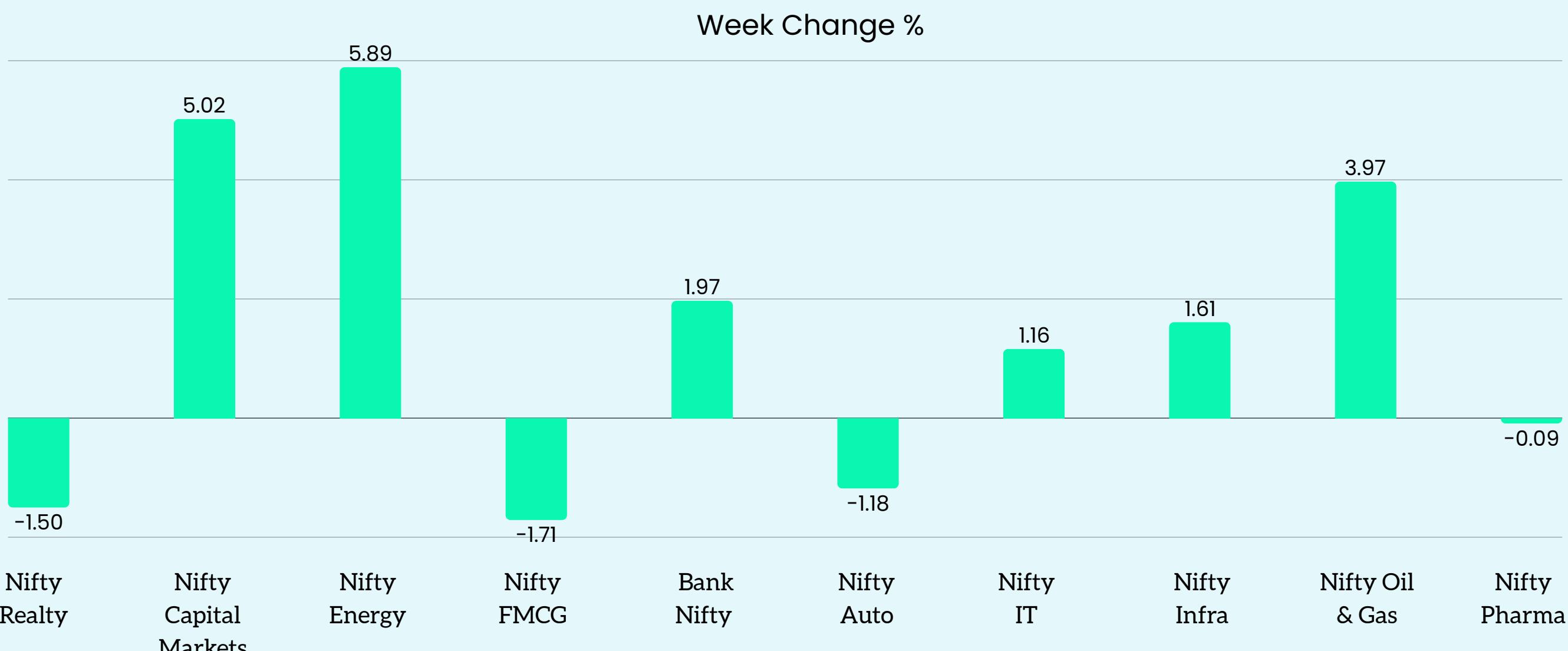
INSTITUTIONAL INVESTMENT TRENDS

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



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.



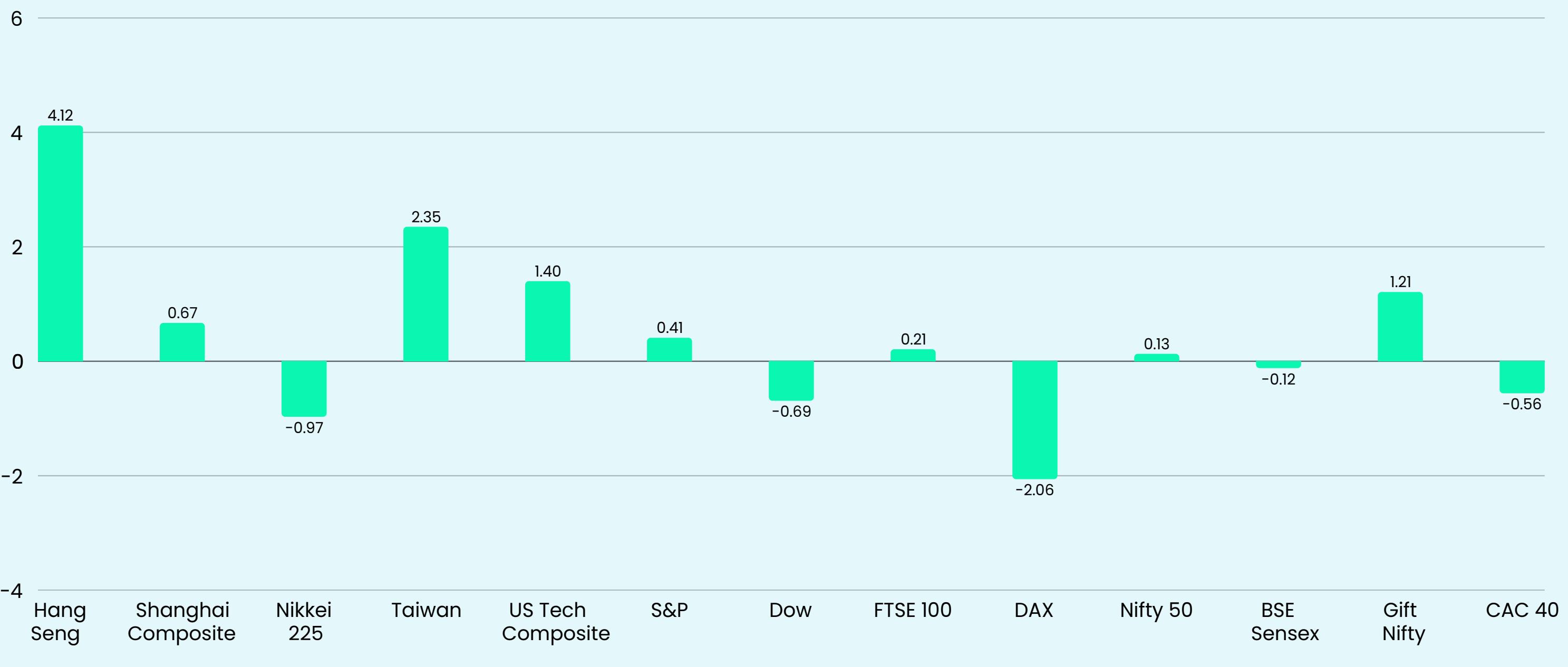
KEY MACRO ECONOMIC DATA (INDIA)

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.

Week Change %



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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