EQUITY WEEKLY REPORT

12th September 2026

Market Snapshot

KEY INDICES	11-Sep-26	04-Sep-26	%Ch
S&P CNX NIFTY	23398.10	23897.70	**-2.09**
SENSEX	74781.76	76515.43	**-2.27**
NIFTY MIDCAP 100	62197.20	63079.05	**-1.40**
NIFTY SMLCAP 100	19906.30	20095.45	**-0.94**

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	11-Sep-26	04-Sep-26	%Ch
NIFTY BANK	56606.55	57369.65	**-1.33**
NIFTY AUTO	27304.50	27710.90	**-1.47**
NIFTY FMCG	45053.75	45892.75	**-1.83**
NIFTY IT	28921.50	30695.10	**-5.78**
NIFTY METAL	12999.05	13317.45	**-2.39**
NIFTY PHARMA	26532.40	26478.10	**0.21**
NIFTY REALTY	848.50	907.90	**-6.54**
BSE CG	77540.06	77868.58	**-0.42**
BSE CD	62332.68	63243.97	**-1.44**
BSE Oil & GAS	25596.44	26169.67	**-2.19**
BSE POWER	7496.57	7475.80	**0.28**

(Source: Investing.com)

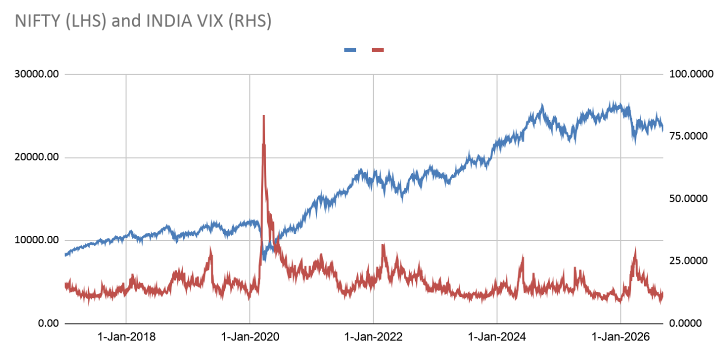
FII & DII Activities (Rs Crore)

04/09/2026 to 11/09/2026

Activities	FIIs	DIIs
Buy	80284.04	93653.52
Sell	88799.97	78303.94
Net	**-8515.93**	**15349.58**

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Benchmarks plunge for sixth straight week as crude oil prices surge

Domestic equity benchmarks ended sharply lower during the week, weighed down by elevated crude oil prices, rising global bond yields and concerns over US inflation. Escalating US-Iran tensions raised concerns over a prolonged conflict and its potential impact on global energy supplies, inflation and monetary policy, prompting investors to remain cautious.

The benchmarks began the week on a weak note on Monday as firm crude prices, rising US bond yields and expectations of a September Federal Reserve rate hike weighed on sentiment. Losses extended into Tuesday and Wednesday as Brent crude crossed the $100-per-barrel mark, intensifying concerns over inflation and the broader macroeconomic outlook. After three consecutive sessions of losses, the domestic market staged a recovery on Thursday, supported by buying at lower levels and gains during the closing auction. However, the recovery proved short-lived, with the benchmarks ending lower again on Friday amid renewed selling pressure and escalating geopolitical tensions.

Sensex Gainers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
ADANIPORTS	1765.00	1709.00	3.28
POWERGRID	269.10	266.00	1.17
NTPC	333.30	332.60	0.21
BEL	405.50	405.20	0.07

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
INFY	1038.20	1130.00	-8.12
HCLTECH	1207.00	1294.00	-6.72
WIPRO	167.50	176.80	-5.26
RELIANCE	1258.00	1322.00	-4.84
TCS	2202.00	2300.90	-4.30

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
ADANIPORTS	1764.60	1707.30	3.36
COALINDIA	426.40	415.35	2.66
DIVISLAB	9322.00	9100.00	2.44
DRREDDY	1165.50	1151.00	1.26
POWERGRID	269.10	266.00	1.17

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
INFY	1037.70	1130.00	-8.17
HCLTECH	1206.10	1293.40	-6.75
SHREECEM	22570.00	23855.00	-5.39
WIPRO	167.40	176.40	-5.10
SBILIFE	1684.70	1775.00	-5.09

(Source: Capitaline)

Investors will closely monitor the US Consumer Price Index (CPI) inflation data, developments in the US-Iran conflict and movements in Brent crude oil prices.

In the week ended on Friday, 11 September 2026, the barometer index, the S&P BSE Sensex declined 1,733.67 points or 2.27% to 74,781.76. The Nifty 50 index dropped 499.60 points or 2.09% to 23,398.10. The BSE 150 Mid-Cap index fell 1.40% to close at 16,859.15. The BSE 250 Small-Cap shed 0.77% to end at 7,225.69.

Global Markets:

Asian Markets

Japan's economy expanded at a faster pace than initially estimated in the April-June quarter, supported by a smaller-than-expected decline in business spending, revised government data showed on Tuesday. The Cabinet Office reported that GDP grew at an annualised rate of 1.4% in Q2, up from the preliminary estimate of 1.1%. On a quarter-on-quarter basis, the economy expanded 0.4%, in line with market expectations and higher than the initial estimate of 0.3%.

In China, CPI inflation accelerated to 0.8% year on year in August from 0.5% in July, while the Producer Price Index (PPI) rose 3.8%, compared with 3.5% in July, as higher energy and metals prices pushed up input costs. Core CPI increased 1% YoY, although subdued domestic demand continued to weigh on underlying price pressures.

European Markets

The European Central Bank raised its key interest rate by 25 basis points to 2.50% on 10 September, citing persistent inflationary pressures from elevated energy costs.

UK gross domestic product (GDP) rose 0.4% month on month in July, following a 0.3% increase in June, the Office for National Statistics (ONS) said on Friday. Services output

Nifty Midcap 100 Gainers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
PAYTM	1807.50	1659.50	**8.92**
LAURUSLABS	1969.00	1840.00	**7.01**
BANDHANBNK	176.52	164.95	**7.01**
MAXHEALTH	1037.70	984.80	**5.37**
FLUOROCHEM	4773.20	4554.00	**4.81**

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	11-Sep-26	04-Sep-26	%Ch
ZEEL	79.36	91.61	**-13.37**
GODREJPROP	1748.00	1982.00	**-11.81**
SAIL	179.00	196.80	**-9.04**
GUJENERGY	241.59	263.59	**-8.35**
DEEPAKNTR	1587.80	1712.40	**-7.28**

(Source: Capitaline)

World Markets

KEY INDICES	11-Sep-26	04-Sep-26	%Ch
DJIA	52573.29	53414.25	**-1.57**
NASDAQ	26333.04	26506.99	**-0.66**
BOVESPA	187206.89	185147.16	**1.11**
FTSE 100	10650.44	10831.09	**-1.67**
CAC 40	8179.77	8278.77	**-1.20**
DAX	25568.56	26046.40	**-1.83**
MOEX RUSSIA	2281.04	2253.41	**1.23**
NIKKEI 225	64011.34	65020.94	**-1.55**
HANG SENG	24805.63	25650.87	**-3.30**
STRAITS TIMES	5695.93	5801.96	**-1.83**
SHANGHAI COMPOSITE	3888.11	3930.12	**-1.07**
JAKARTA	6541.38	6636.48	**-1.43**

(Source: Capitaline, Investing.com)

grew 0.4%, supported particularly by firms offering artificial intelligence (AI) products, while industrial production increased 0.2% and construction output rose 0.1%. The monthly data indicate that UK economic output has increased 1.5% in the first seven months of the year.

US Markets

The US Labor Department reported that nonfarm payrolls increased by 162,000 in August, well above economists' expectations for a 56,000 rise. The unemployment rate remained at 4.1%. The labour-force participation rate edged up to 61.6%. Payroll gains for June and July were also revised higher by a combined 55,000.

(Source: Capitaline)

Outlook and Technical View

Global developments, including the evolving U.S.-Iran conflict, movements in crude oil prices, rising bond yields, movement of rupee against USD, energy market dynamics, interest-rate outlook and other international macroeconomic cues, will also remain key drivers of market sentiment in the near term. Besides, Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be closely monitored.

From the technical standpoint, Nifty may find support at 23270, 23142, 23053, 22982 while levels of 23487, 23576, 232704, 23822 may act as resistance with pivot point at 23359.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	29-Sep-26	23499.00	24048.00	**-2.28%**	**100.90**	717324	614835	**16.67%**
BANKNIFTY	29-Sep-26	56921.00	57775.00	**-1.48%**	**314.45**	144118	133836	**7.68%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	179.00	181.09	29-Sep-26	**23.68%**
RBLBANK	412.55	415.90	29-Sep-26	**16.47%**
HINDPETRO	352.00	354.75	29-Sep-26	**15.84%**
MUTHOOTFIN	2792.10	2812.70	29-Sep-26	**14.96%**
CONCOR	499.25	502.85	29-Sep-26	**14.62%**
TCS	2200.80	2216.50	29-Sep-26	**14.47%**
LICHSGFIN	562.90	566.85	29-Sep-26	**14.23%**
ONGC	232.50	234.12	29-Sep-26	**14.13%**
BAJAJFINSV	1913.50	1926.50	29-Sep-26	**13.78%**
MARUTI	12400.00	12484.00	29-Sep-26	**13.74%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	167.40	165.49	29-Sep-26	**-23.14%**
MANAPPURAM	329.00	326.70	29-Sep-26	**-14.18%**
HAVELLS	1111.00	1105.10	29-Sep-26	**-10.77%**
SIEMENS	3957.00	3941.60	29-Sep-26	**-7.89%**
GRASIM	3281.90	3272.60	29-Sep-26	**-5.75%**
TITAN	5009.50	5001.50	29-Sep-26	**-3.24%**
FEDERALBNK	344.50	344.00	29-Sep-26	**-2.94%**
NESTLEIND	1383.30	1381.50	29-Sep-26	**-2.64%**
PAGEIND	35365.00	35320.00	29-Sep-26	**-2.58%**
ASIANPAINT	2472.50	2469.80	29-Sep-26	**-2.21%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	73499020	73341920	**1.00**

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. GVT&D	**2. GODREJPROP**	**3. LODHA**	**4. BRIGADE**	**5. OBEROIRLTY**
6. ABREL	**7. PRESTIGE**	**8. DLF**	**9. ANANTRAJ**	**10. SOBHA**
11. PHOENIXLTD				

(Source: Moneycontrol)

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