Weekly Market Insights & Strategies

15 June 2026

StockHolding Services Limited
(Formerly Known as SHCIL Services Limited)

Weekly Market Recap: India & Global

The week began on a weak note as the Nifty 50 fell 1.04% on Monday to close at 23,123, pressured by a sharp selloff across Asian markets and rising crude oil prices amid escalating Middle East tensions. Broad-based weakness was visible across sectors, with Financials and IT declining 1.0% and 1.2%, respectively, while technology, semiconductor, and AI-related stocks faced heavy selling. Wipro was a notable laggard, falling 8% following its buyback record date. Sentiment improved sharply on Tuesday as the RBI's measures to boost foreign currency inflows supported banking stocks and fueled a market rebound, with the Nifty gaining 119 points and closing near the day's high. Broader markets outperformed, led by a strong rally in midcaps, although the IT sector extended its losing streak to a fifth consecutive session. However, the recovery lost momentum on Wednesday as benchmark indices ended marginally lower after failing to hold intraday gains. Selling pressure emerged across most sectors, with only FMCG and private banks closing in positive territory. The Nifty and Sensex slipped 0.12% and 0.09%, respectively, while broader markets underperformed, with the Nifty Midcap and Smallcap indices declining around 1.5% and 1.3%. Media, Realty, Energy and Metal stocks were among the worst performers, falling 1–2%. Nifty closed 0.23% down on Thursday as sentiments were negative due to renewed escalation in the Middle East Conflict. 12 sectors ended in red. The US and Iran continued attacks on Thursday as well. US consumer Inflation data was increased. Concerns over the impact of AI disruption after release of new tools by Anthropic contributed as well. Nifty closed sharply higher on Friday, up by 461 points to settle at 23622.90. The rally was driven after drop in crude prices sharply, trading at 86 $per barrel. The de-escalation of Middle east war crisis suggested progress towards US-Iran agreement. Shriramfin was the top gainer for nifty with 8.10% and Nestle India leading the losers chart board by 3.23%, after news of larvae and insects in Maggi. Globally, Dow Jones was up 0.66%, S&P 500 up 0.65%, Nasdaq up by 0.70%. In Asia, Nikkei 225 was up by 3.49%, KOSPI was down by 0.45%, Shanghai was flat and Hang Seng down 0.98%.

Indian Equity Market Performance & Key Valuation Ratio

Index	12-06-2026	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	23,622.90	1.10%	20.37	3.11	1.23
BSE Sensex	75,527.95	1.73%	20.41	4.04	1.06
BSE 150 MidCap Index	16,226.22	-0.34%	28.95	5.41	0.73
BSE 250 SmallCap Index	6,798.01	0.19%	36.92	4.11	0.67
BSE 250 LargeMidCap Index	10,473.76	0.61%	22.09	4.23	1.02
Sectoral Indices					
BSE Fast Moving Consumer Goods	18,139.99	1.19%	33.13	7.51	0.91
BSE Commodities	8,467.97	-1.11%	24.06	3.3	0.58
BSE Consumer Discretionary	9,196.11	-0.17%	45.87	6.91	0.68
BSE Energy	11,287.66	-1.56%	9.86	1.9	2.84
BSE Financial Services	12,200.79	3.21%	16.83	2.93	0.89
BSE Healthcare	47,388.27	1.02%	41.61	7.22	0.54
BSE Information Technology	27,167.90	-3.73%	19.03	5.59	2.43
BSE Auto	57,912.57	0.49%	33.33	6.38	1.23
BSE Bankex	63,987.80	4.08%	14.39	2.29	0.86
BSE Metal	42,004.45	-2.80%	18.78	3.23	0.53
BSE Oil & Gas	26,151.06	-1.52%	8.16	1.58	3.04
BSE Power	7,920.40	-2.64%	36.12	5.02	1.03
BSE Realty	6,010.50	0.24%	36.56	4.82	0.39

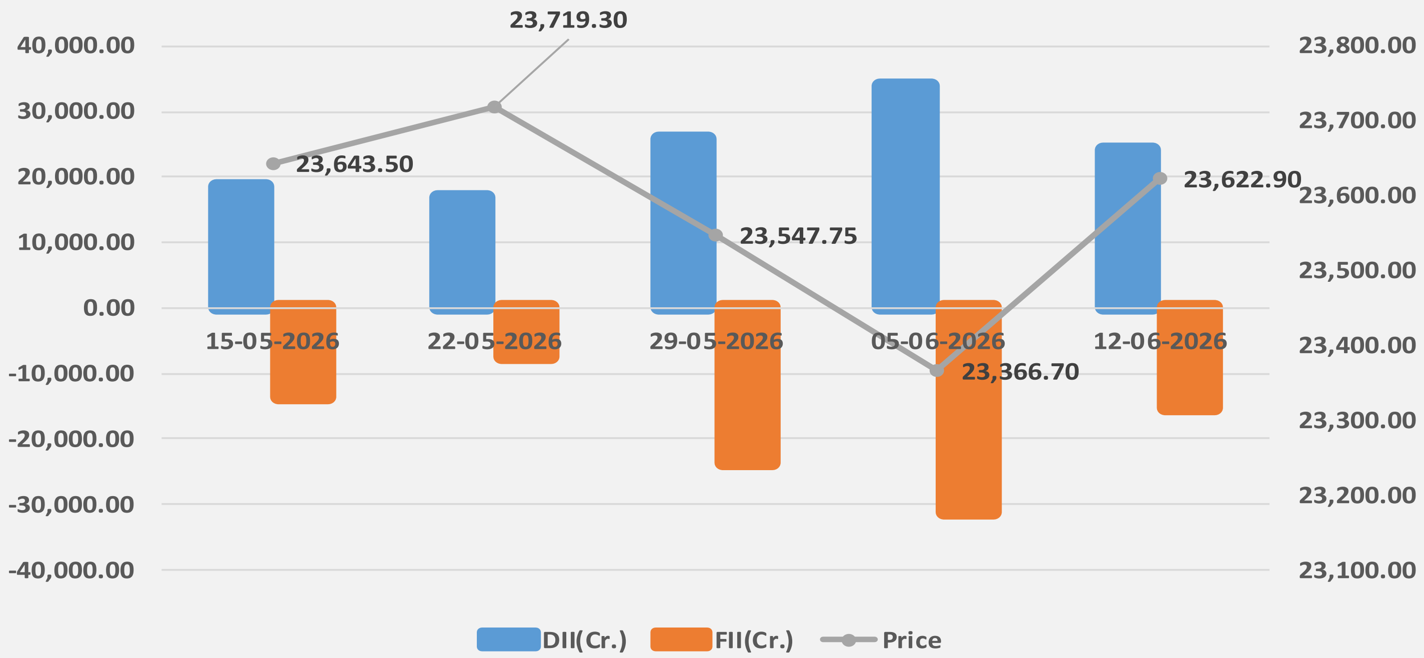
BSE-Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Kotak Mahindra Bank Ltd	403.30	6.90%	7.30%
Axis Bank Ltd	1,356.30	6.60%	7.60%
ICICI Bank Ltd	1,340.80	6.20%	8.10%
Interglobe Aviation Ltd	4,709.70	5.10%	12.10%
State Bank of India Ltd	1,017.20	4.00%	4.40%

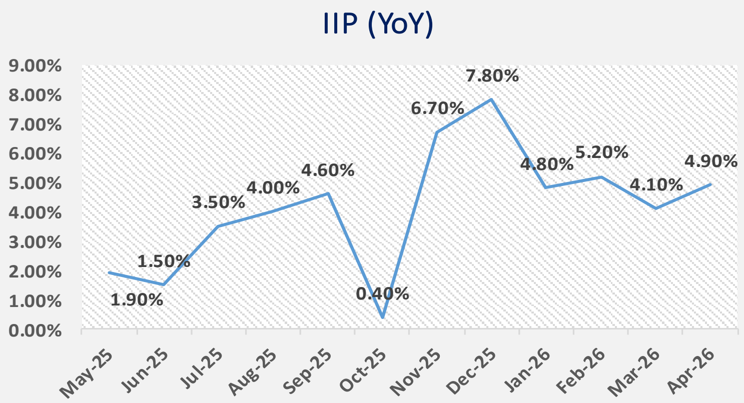
BSE-Losers

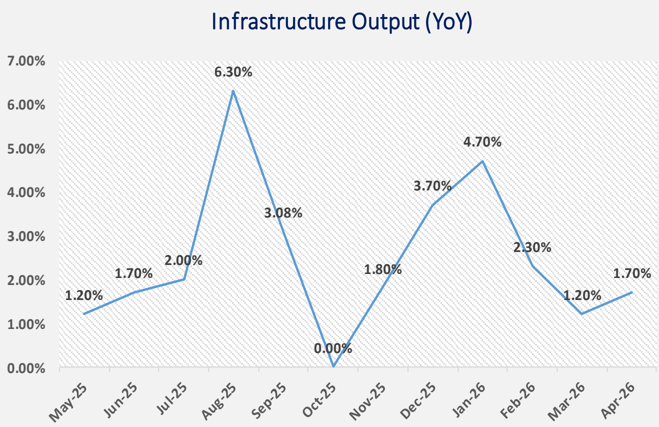
Symbol	LTP	%Change (WoW)	%Change (MoM)
Infosys Ltd	1,116.40	-6.80%	-2.10%
Eternal Ltd	243.80	-5.00%	1.60%
Tata Steel Ltd	197.90	-4.30%	-6.70%
HCL Technologies Ltd	1,109.60	-3.90%	-3.20%
Tech Mahindra Ltd	1,429.20	-3.70%	2.60%

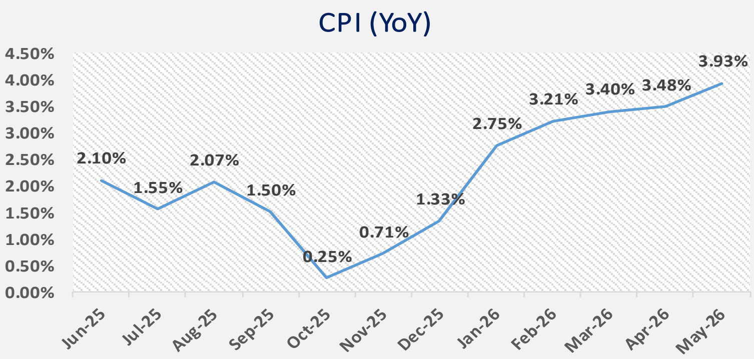
FII & DII Investment Flow Vs NIFTY50

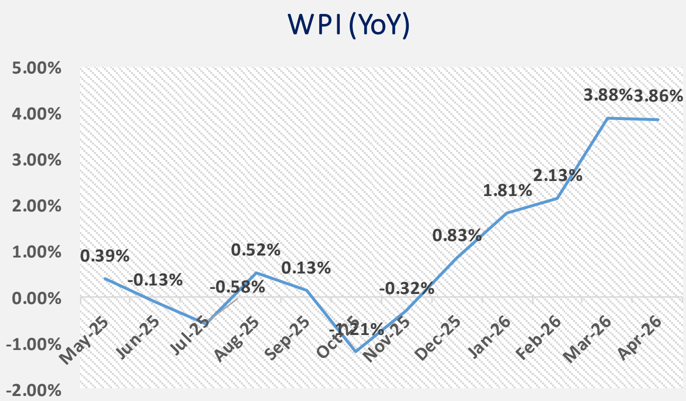


Macro-Economic Performance: India









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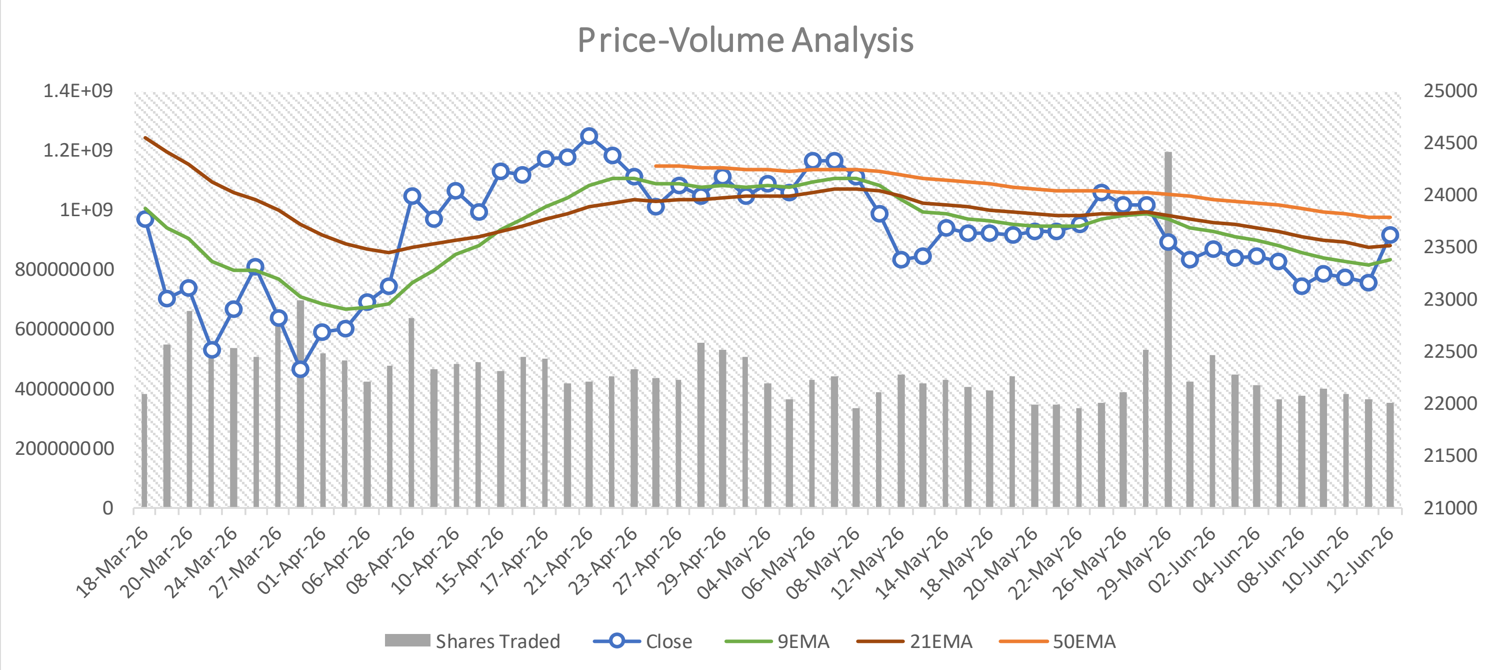
Market View from Research Desk:



NIFTY (23,622.90): From an India market perspective, the sharp decline in crude oil prices coupled with a fall in the India 10-year bond yield to 6.87% is supportive for the broader economy, easing inflation concerns and improving liquidity conditions. The strong outperformance of Bank Nifty along with a decline in India VIX indicates improving risk appetite and confidence in domestic growth, favouring banking, NBFCs, real estate, automobiles, consumer discretionary, paints, aviation, and logistics sectors. The decline in gold and silver prices suggests a shift towards risk assets, while higher copper prices reflect improving industrial activity, benefiting capital goods, infrastructure, electrical equipment, and industrial manufacturing companies. The relatively stable rupee and lower bond yields are also positive for rate-sensitive sectors. On the negative side, upstream oil & gas producers and precious metal-linked businesses may face near-term pressure due to weaker commodity prices.

Nifty 50 witnessed a strong recovery during the week and formed a bullish Marubozu-like candle on the daily chart on 12 June, indicating robust buying interest across sectors. The index decisively reclaimed the 23,500 zone and closed near the day's high at 23,622, suggesting a breakout from the recent consolidation range and continuation of the higher high–higher low structure. Momentum indicators are likely to remain positive with immediate resistance around 23734/23802/24021/24241 and 23159/23091/22871/22651 as the support levels. RBI announced a special framework for FCNR(B) deposits and ECBs to enhance foreign currency inflows, while India's CPI inflation remained contained at 3.93% in May 2026. In the US, higher-than-expected CPI and PPI readings, along with resilient consumer sentiment and stable labour market conditions, reinforced expectations of elevated interest rates, potentially impacting capital flows to emerging markets. Meanwhile, China's subdued inflation reflected weak domestic demand, although stronger-than-expected trade data supported regional sentiment, while ongoing Middle East tensions kept markets alert to energy price and inflation risks. Investors will be keenly tracking India WPI inflation, Unemployment rate along with Japan’s Interest Rate Decision.

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