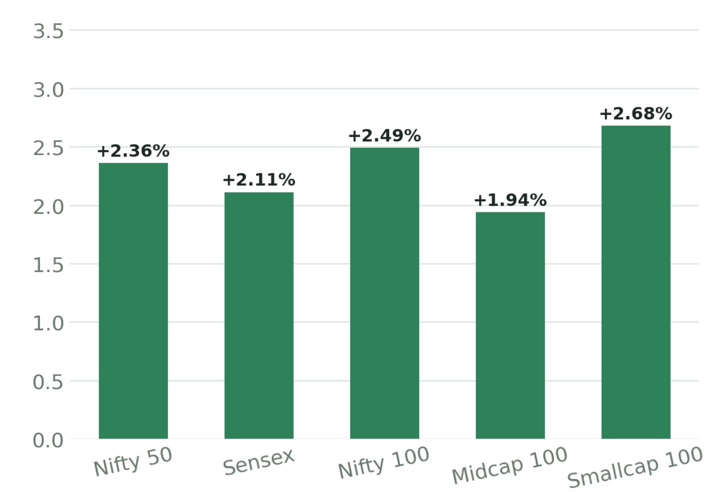
NIFTY 50	SENSEX	RBI REPO RATE	INDIA CPI	BRENT CRUDE
+2.36%	+2.11%	5.25%	4.45%	+19.9%

01 Equity Markets — July 2026

INDIA

INDEX	BEGINNING	ENDING	RETURN
Nifty 50	23,897.65	24,383.60	+2.36%
Sensex	76,545.21	78,094.64	+2.11%
Nifty 100	24,953.20	25,486.35	+2.49%
Nifty Midcap 100	61,935.35	62,915.30	+1.94%
Nifty Smallcap 100	18,901.25	19,339.65	+2.68%

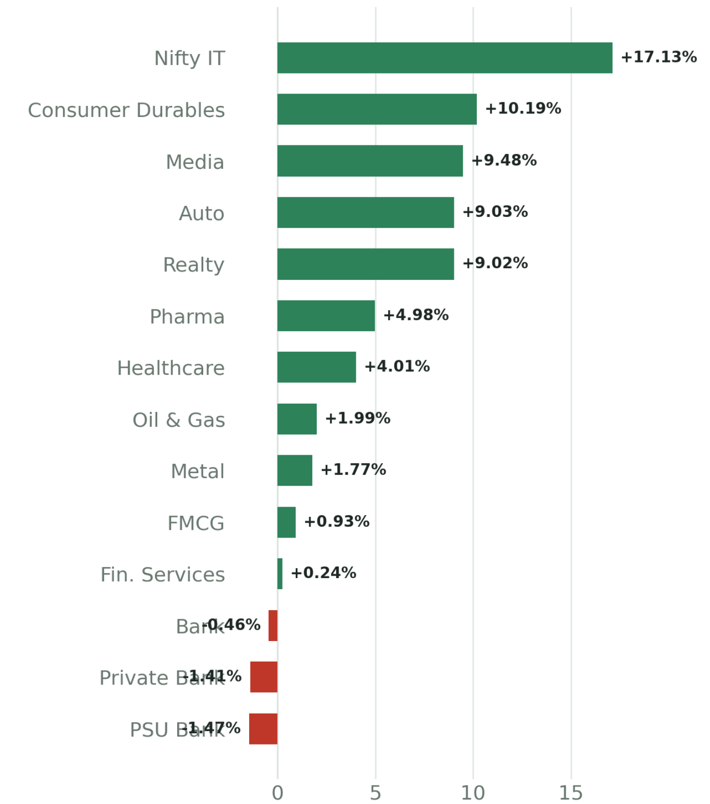
BENCHMARK RETURNS (%)



SECTORAL INDICES

SECTOR INDEX	01-JUL	31-JUL	RETURN
Nifty IT	26,381.00	30,708.90	+17.13%
Nifty Consumer Durables	36,734.25	40,072.15	+10.19%
Nifty Media	1,486.85	1,618.65	+9.48%
Nifty Auto	26,585.15	28,744.15	+9.03%
Nifty Realty	834.60	901.45	+9.02%
Nifty Pharma	25,416.90	26,534.80	+4.98%
Nifty Healthcare	16,192.80	16,755.50	+4.01%
Nifty Oil & Gas	11,058.45	11,247.70	+1.99%
Nifty Metal	12,515.30	12,719.00	+1.77%
Nifty FMCG	48,981.90	49,121.20	+0.93%
Nifty Financial Services	26,553.75	26,594.05	+0.24%
Nifty Bank	57,573.35	57,264.85	-0.46%
Nifty Private Bank	27,949.15	27,522.65	-1.41%
Nifty PSU Bank	8,525.20	8,367.20	-1.47%

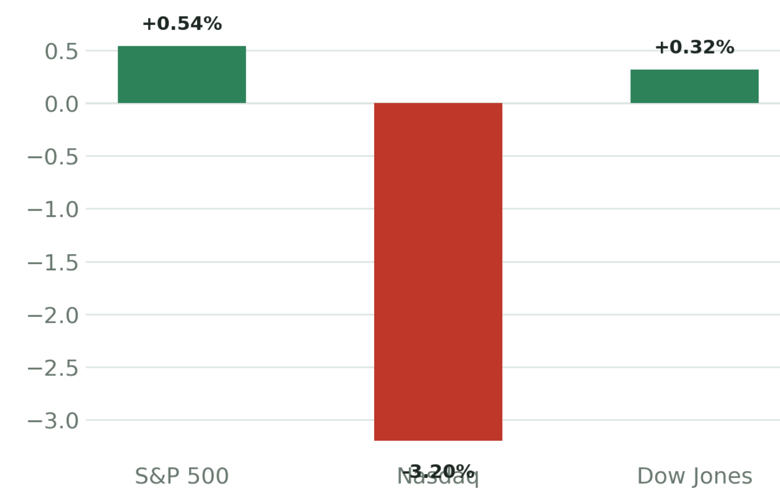
SECTOR PERFORMANCE (%)



GLOBAL

INDEX	BEGINNING	ENDING	RETURN
S&P 500	7,449.36	7,489.72	+0.54%
Nasdaq	26,213.72	25,373.85	-3.20%
Dow Jones	52,319.20	52,485.03	+0.32%

GLOBAL INDEX RETURNS (%)



02 Institutional Flows — July 2026

FII EQUITY NET

+₹15,412 Cr

First net buying since Feb '26

DII EQUITY NET

+₹32,839 Cr

Continued domestic support

FII DEBT FLOWS

+$3.04 Bn

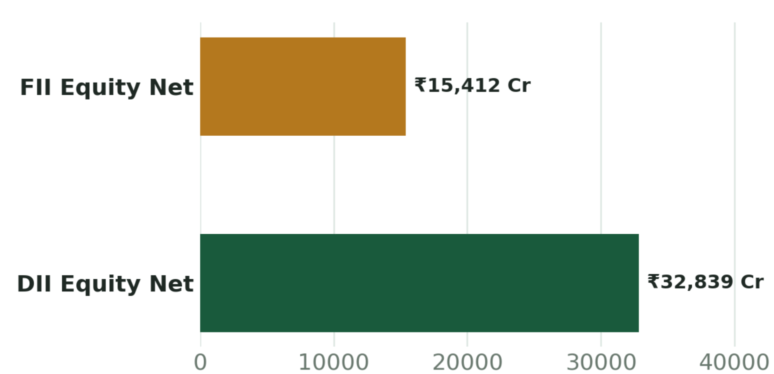
2nd straight monthly inflow

NET ACTIVITY

Net Buyers

Both FII & DII in July

FII VS DII NET EQUITY FLOWS (₹ CRORE)



03 Fixed Income / Debt Market — July 2026

10-YEAR G-SEC YIELD

~6.7% – 6.8%

Pushed up late-month by the crude-oil spike

RBI REPO RATE

5.25%

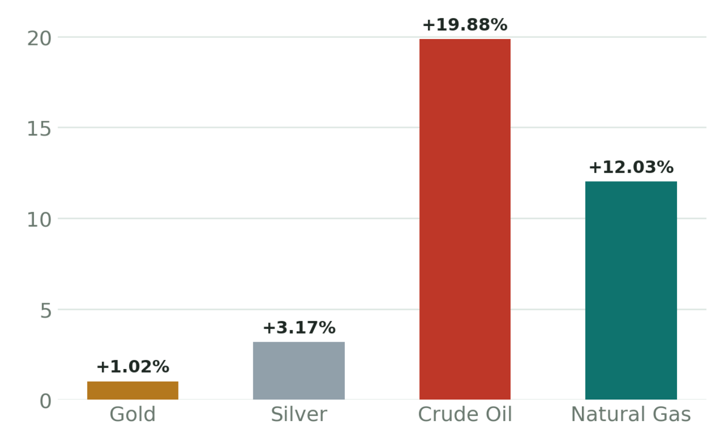
Held, Neutral stance

04 Commodity Markets — July 2026

ASSET	LEVEL (31-JUL, MCX ₹)	CHANGE
Gold (10g)	₹1,42,295	+1.02%
Silver (1kg)	₹2,17,990	+3.17%
Crude Oil (bbl)	₹8,002	+19.88%
Natural Gas	₹264	+12.03%

> Brent crude jumped ~20% in July — its biggest monthly rise since March — ending near $88/bbl after topping $94 mid-month, as the US–Iran ceasefire collapsed and Strait of Hormuz risk resurfaced.

MONTHLY CHANGE (%)



05 Currency Markets — July 2026

USD/INR

₹95.35

31-Jul close

DXY (DOLLAR INDEX)

~100.1

Range through July

06 Economic Indicators — July 2026

GROWTH

GDP GROWTH (FY27 FORECAST)

6.7%

Raised by RBI at the August policy

Q1 FY27 GDP (SBI ESTIMATE)

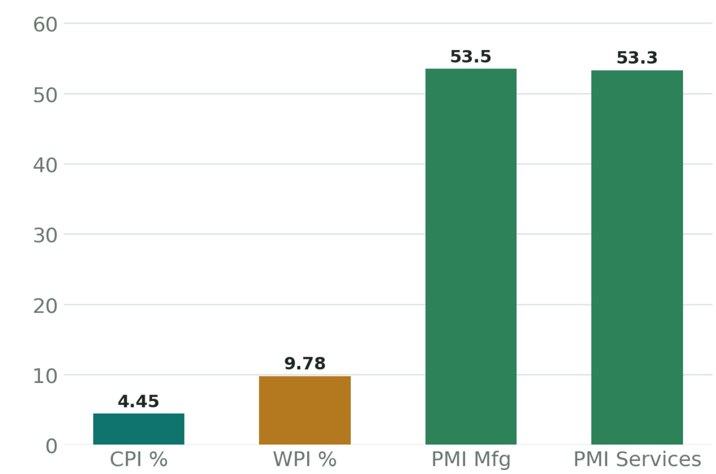
~7%

Official print pending as of mid-Aug

INFLATION & PMI

CPI	4.45%
WPI	9.78%
PMI Manufacturing	53.5
PMI Services	53.3

INDIA INFLATION & PMI



INTEREST RATES

RBI REPO RATE

5.25%

Neutral stance

US FEDERAL FUNDS RATE

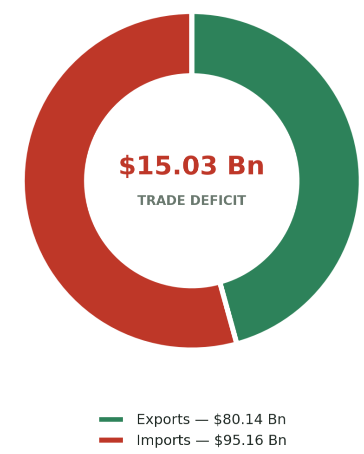
Held

Fed held rates at its July 29 meeting

EXTERNAL SECTOR

METRIC	VALUE
Merchandise Trade Deficit	$31.98 Bn
Overall Trade Deficit (Goods+Services)	$15.03 Bn

INDIA TRADE — JULY 2026 ($ BN)



GOVERNMENT & FISCAL

GST COLLECTIONS (GROSS)

₹2.11 Lakh Cr

+15.4% YoY — fastest in 14 months

GST COLLECTIONS (NET)

₹1.81 Lakh Cr

+15.8% YoY

07 Global Economic & Geopolitical Indicators — July 2026

US CPI

3.4%

Core CPI 2.5%

US NON-FARM PAYROLLS

-23,000

Unemployment rate 4.1%

US ISM MANUFACTURING PMI

55.6

Strongest since May 2022

MAJOR CENTRAL BANK DECISIONS

US Federal Reserve	Held rates — July 29
Bank of Japan	Held rates — late July
Reserve Bank of India	Held repo at 5.25%, Neutral stance

MAJOR GEOPOLITICAL DEVELOPMENTS

> A fragile US–Iran ceasefire collapsed mid-month, with strikes resuming and renewed fears of Strait of Hormuz shipping disruption — the dominant macro theme of July. This drove Brent crude ~20% higher and elevated volatility across equities, bonds and the rupee.

Sources: NSE/BSE data via Navia Markets' July 2026 monthly wrap · CNBC · Trading Economics · Ministry of Commerce & Industry · RBI / SBI Research · HDFC Sky · Business Standard, ANI, Tribune India.