WEEKLY MARKET UPDATE

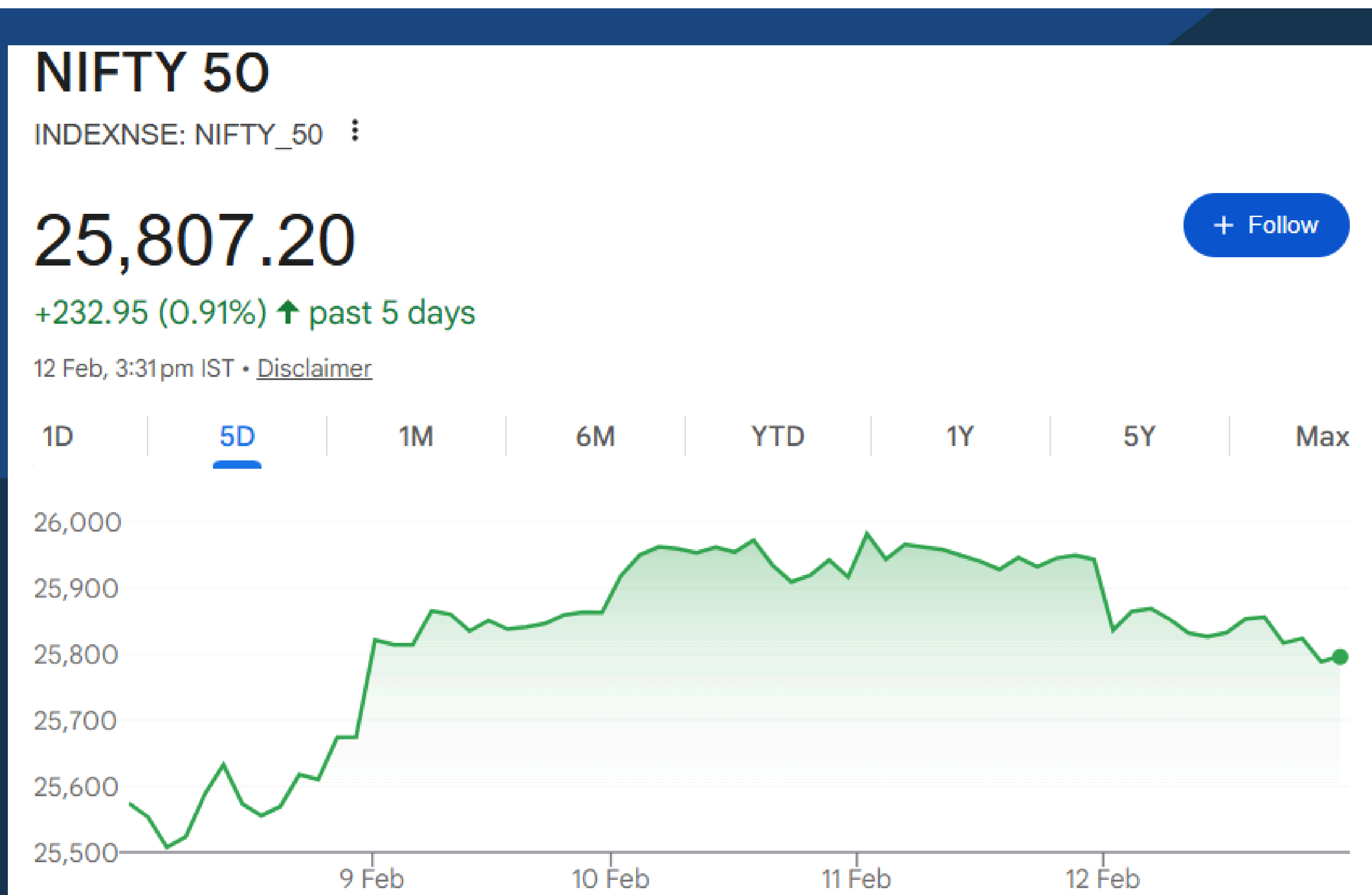
06th Feb, 2026 to 12th Feb, 2026

MARKET OVERVIEW

Indian Equity Markets Navigate Volatility Amid Policy, Global, and Sectoral Developments

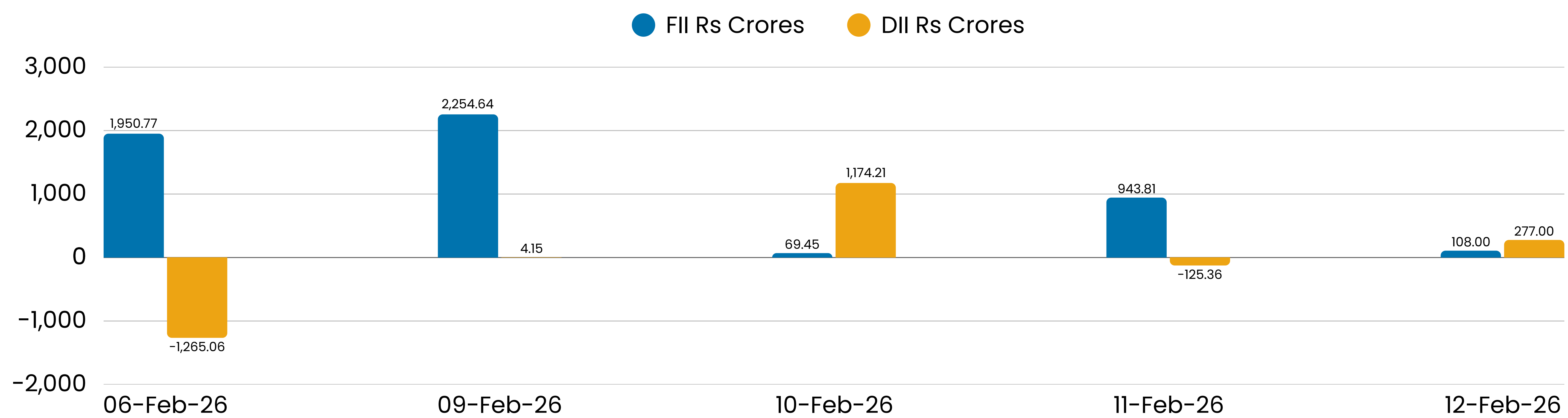
- Indian equity markets witnessed profit booking after a strong three-session rally, with geopolitical tensions and caution ahead of key policy developments keeping sentiment subdued.
- The RBI maintained the policy rate at 5.25% and flagged elevated global risks, which, along with rupee weakness and mixed global cues, led investors to adopt a cautious stance.
- Despite weak openings on select sessions, late buying interest helped markets recover intraday losses and close with modest gains.
- Sentiment improved significantly after India and the U.S. unveiled an interim trade framework aimed at tariff reductions, stronger energy ties, and deeper economic cooperation.
- Firm global cues, FII inflows, easing U.S.–Iran tensions, and strong PSU bank earnings supported sentiment.
- Profit booking, rising crude prices, Middle East tensions, and caution ahead of inflation data capped gains.

As a result, the BSE Sensex up by 0.73%, closing at 83,674.92 , while the Nifty 50 up by 0.91%, settling at 25,807.20



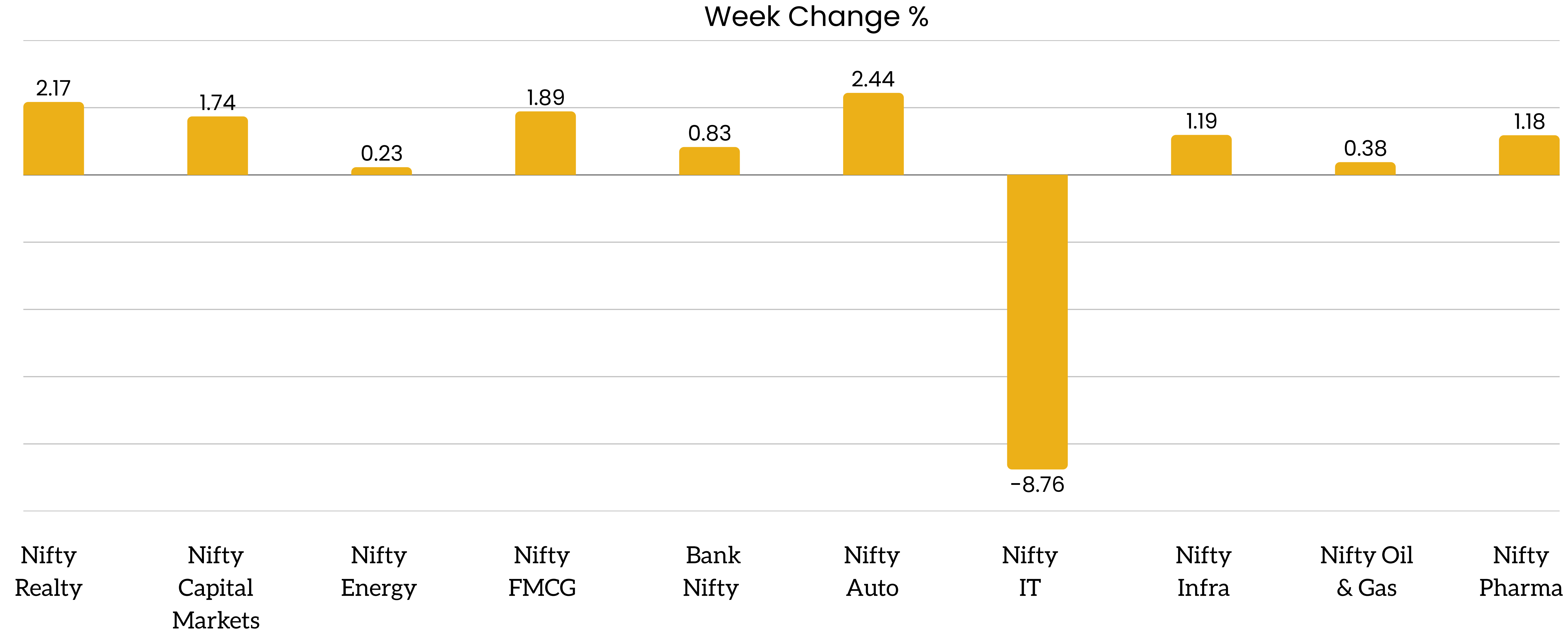
INSTITUTIONAL INVESTMENT TRENDS

- FIIs recorded a net inflow of ₹5326.67 crore, indicating a shift from continued foreign selling pressure.
- DIIs posted a net inflow of ₹64.94 crore, providing strong domestic support to the equity markets.



SECTORAL HIGHLIGHTS

- Nifty Auto led the week with a strong +2.44% gain, outperforming all other sectors.
- Nifty Realty followed closely, rising +2.17% on strong buying interest.
- Nifty IT was the worst performer, plunging sharply by -8.76%.
- Nifty Energy underperformed peers with a marginal gain of just +0.23%.

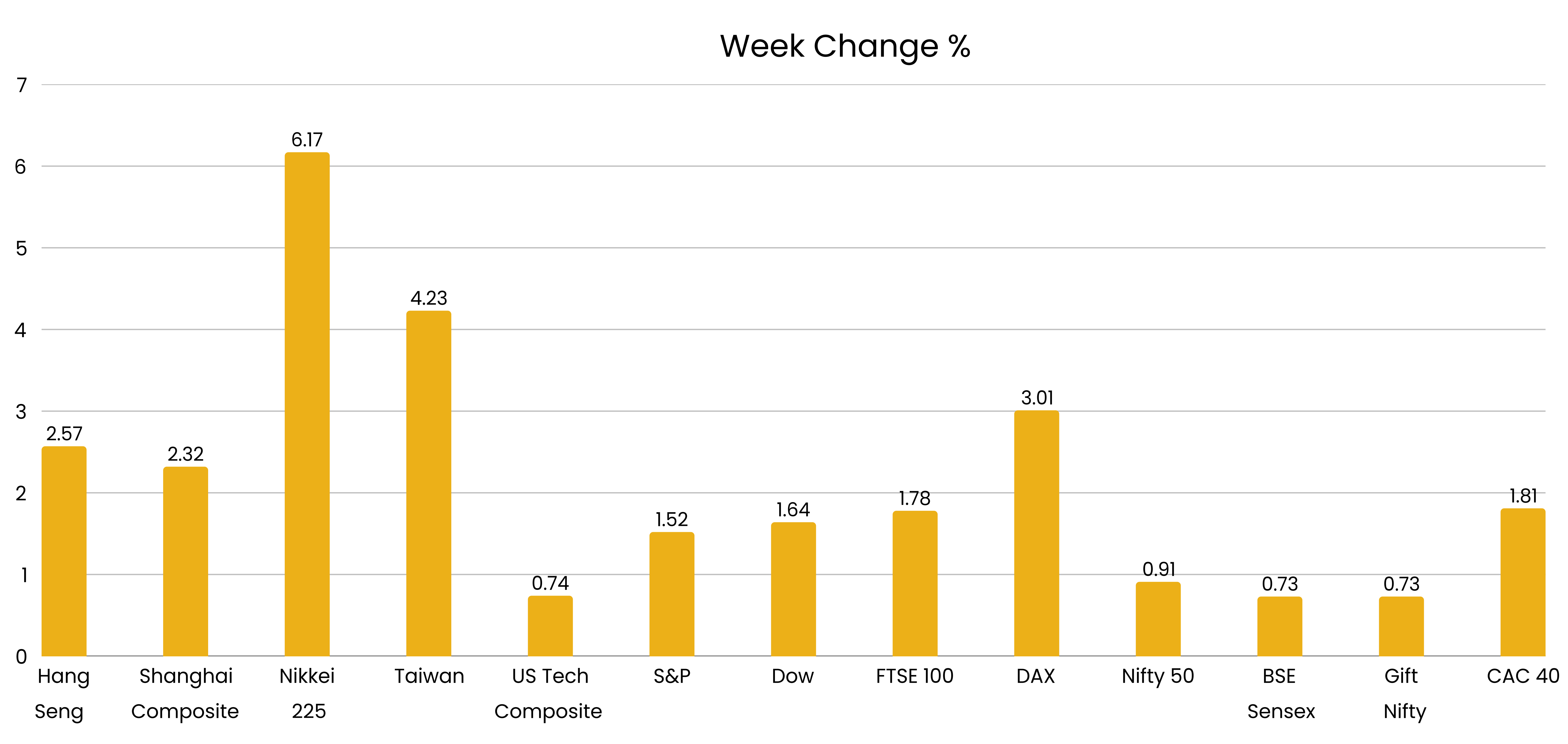


KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Dec-2025	1.33%
INTEREST RATE	Daily	06 - Feb	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	Dec-2025	₹ 33,80,998 Crore
10-YEAR GOVERNMENT BOND YIELD	Daily	11- Feb	6.72%

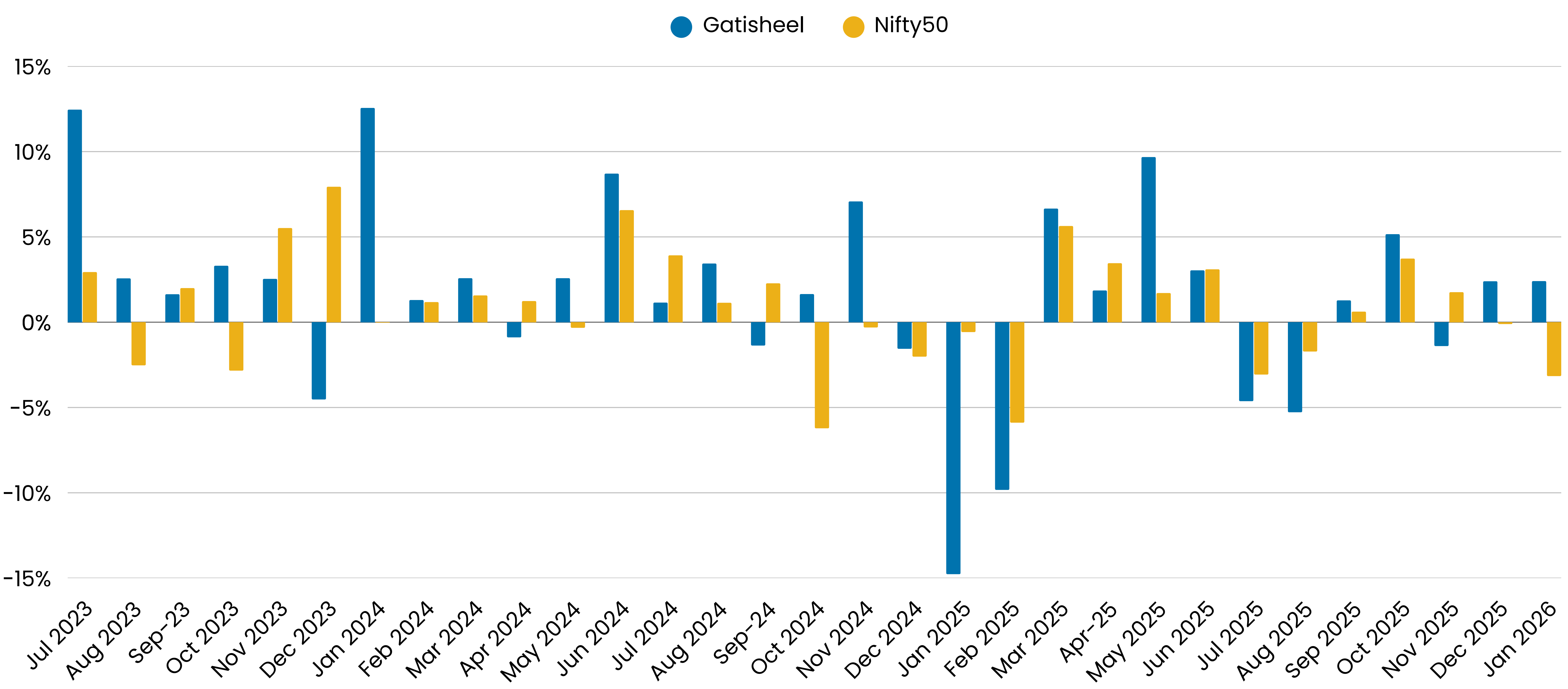
GLOBAL EQUITY MARKET OVERVIEW

- Nikkei 225 led globally with a strong +6.17% weekly surge.
- Taiwan index followed with an impressive +4.23% gain.
- US Tech Composite was the weakest, rising only +0.74%.
- BSE Sensex and GIFT Nifty lagged among peers with modest +0.73% gains.



PORTFOLIO PERFORMANCE UPDATE

- The Provitt Gatisheel Stock Basket, benchmarked to the Nifty 50, follows a disciplined monthly rebalancing strategy focusing on high-quality, large-cap stocks above ₹1,000 crore.
- The portfolio demonstrates strong potential to outperform the Nifty through active management and selective stock picking, balancing growth with controlled risk.
- Its diversified, agile structure enables quick responses to market shifts, helping investors capture opportunities while managing volatility effectively.



Note - The month-on-month % changes exclude dividends. A 4.10% dividend yield is not included, so total investor returns would be higher than the price changes shown.

BROADER MARKET INDEX

INDICES	WEEK'S CLOSE	WEEK'S CHANGE
NIFTY 50	25,807	0.91%
NIFTY NEXT 50	69,916	1.93%
NIFTY MIDCAP 100	60,470	1.60%
NIFTY SMALL CAP 100	16,250	2.12%
NIFTY LARGE & MID CAP 250	16,769	1.11%

MUTUAL FUND MODEL PORTFOLIO : JANUARY

(01 Jan 2026 – 31 Jan 2026)

PORTFOLIO	OBJECTIVE	ASSET ALLOCATION	PORTFOLIO AGE	XIRR DEC 2025	XIRR JAN 2025
Portfolio-1	Wealth Creation	94% Equity/ 6% Debt	10 Years 4 Months	20.15%	18.69%
Portfolio-2	Wealth Creation	90% Equity/ 10% Debt	8 Years 4 Months	18.74%	16.52%
Portfolio-3	Education	80% Equity/ 20% Hybrid	8 Years 8 Months	22.11%	20.78%
Portfolio-4	Retirement	100% Equity	5 Years 4 Months	22.18%	20.85%
Portfolio-5	Wealth Creation	93% Equity/ 7% Debt	6 Years 4 Months	23.66%	22.63%

Key Insights

- All model portfolios continue to deliver healthy double-digit XIRRs.
- Slight softening in January returns is due to short-term market volatility
- Equity-heavy allocations remain the primary driver of long-term returns.
- Hybrid allocation portfolios provide better risk balance with competitive performance.

Takeaways for Investors

- Short-term return fluctuations are a normal part of investing.
- Long-term wealth creation requires patience and discipline.
- Asset allocation should align with individual goals and risk appetite.
- Staying invested is more effective than attempting to time the market.

VOICES OF PROVITT

Is the U.S.–Bangladesh Cotton Deal a Game Changer... or a Wake-Up Call for India?

The United States and Bangladesh are moving closer on a cotton-focused trade understanding, a development that could subtly reshape the global textile supply chain. Bangladesh, one of the world's largest garment exporters, depends heavily on imported cotton to power its readymade garment (RMG) industry. The U.S., a major cotton producer, is seeking stronger and more stable export channels.

At first glance, this may appear routine. But in textiles, sourcing shifts matter.

India has long been a key cotton supplier to Bangladesh due to proximity, competitive logistics, and strong trade ties. However, if U.S. cotton gains preferential access, better pricing structures, or long-term supply arrangements, Bangladeshi mills could gradually rebalance procurement, increasing competitive pressure on Indian exporters.

The implications extend beyond raw cotton. If Bangladesh secures more stable or cost-efficient inputs, its garment exports particularly to the U.S. could gain an edge, intensifying competition for Indian textile players.

This is not an immediate threat, but it is a strategic signal.

Trade partnerships today shape supply chains for years. The real question is whether India responds by strengthening competitiveness, ensuring policy stability, and reinforcing its position in the evolving global textile landscape.

— **Abhinav Mahendru (Intern - Research)**

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