

WEEKLY MARKET UPDATE

13th Feb, 2026 to 19th Feb, 2026

MARKET OVERVIEW

Markets See Swings as IT Pressure, Global Cues and Macro Signals Drive Sentiment

- Indian equities fell as IT stocks led losses on AI disruption fears, while strong U.S. jobs data reduced expectations of early Fed rate cuts.
- Markets declined again amid broad-based selling and weak global cues, with sentiment hit by worries over rising competition for Indian IT firms.
- Equities rebounded despite muted global signals, even as IT weakness persisted and higher wholesale inflation added macro concerns.
- Markets closed with modest gains as geopolitical tensions eased, diplomatic talks progressed, and PSU banks outperformed on strong results.
- Investors stayed cautious, tracking global cues, interest-rate expectations, and sector-specific movements.

As a result, the BSE Sensex down by 0.40%, closing at 82,498.14 , while the Nifty 50 down by 0.51%, settling at 25,454.35

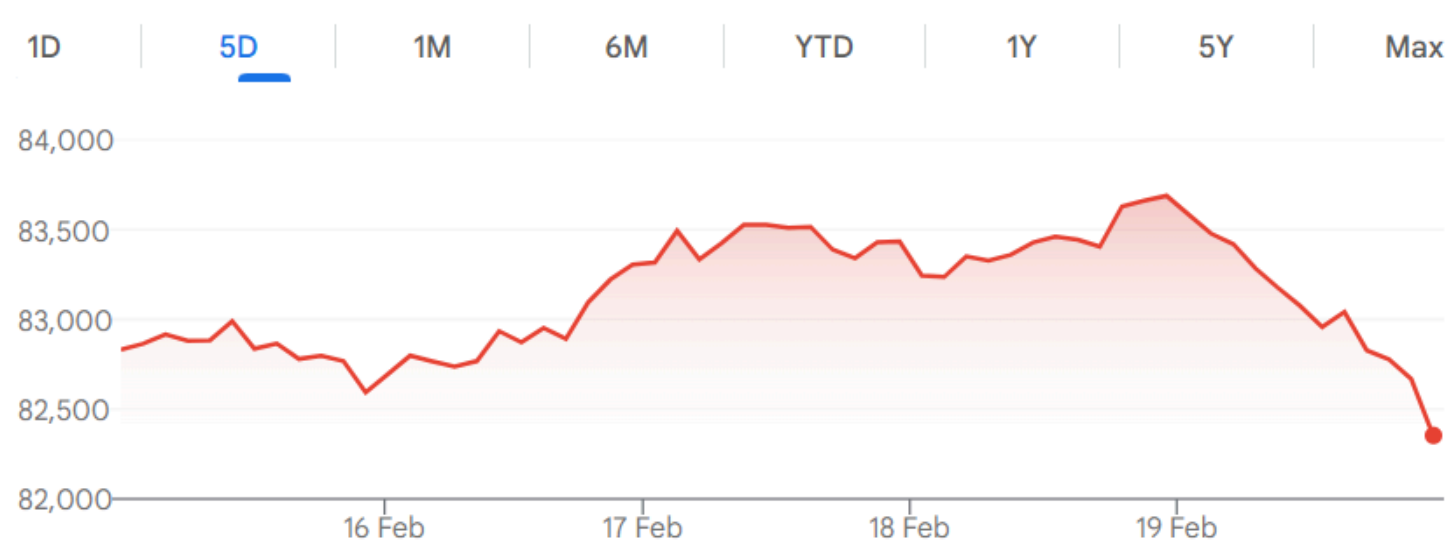
BSE SENSEX

INDEXBOM: SENSEX

82,498.14

-332.61 (-0.40%) ↓ past 5 days

19 Feb, 3:30 pm IST • [Disclaimer](#)



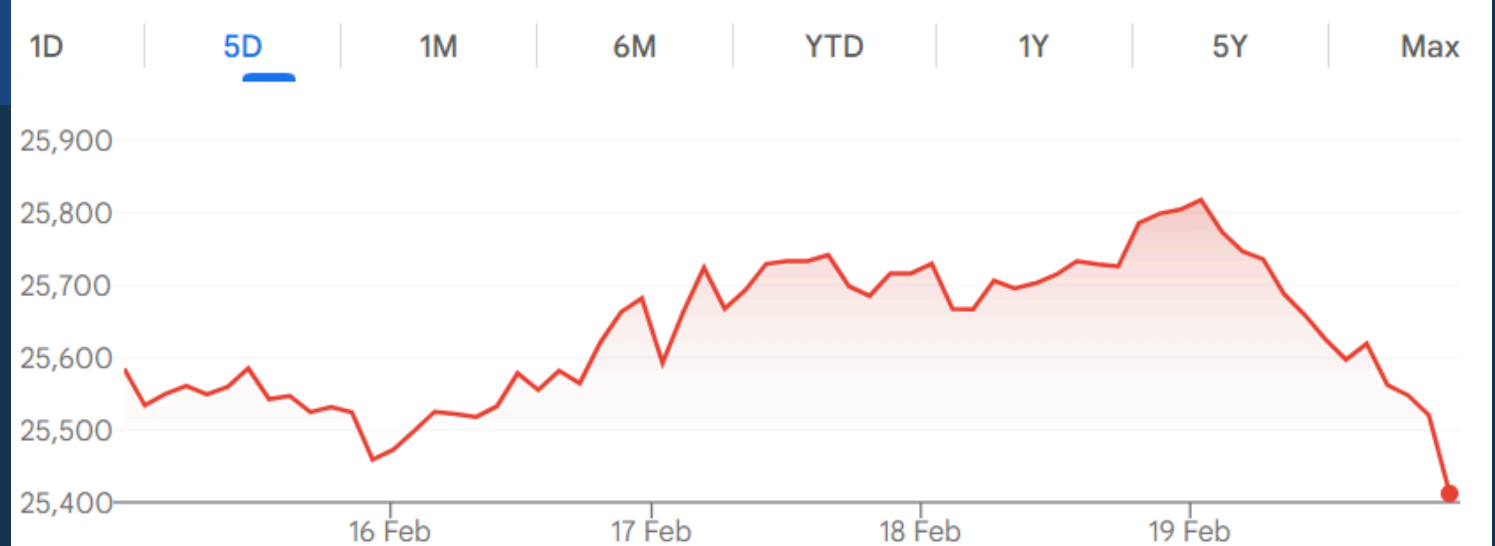
NIFTY 50

INDEXNSE: NIFTY_50

25,454.35

-130.35 (-0.51%) ↓ past 5 days

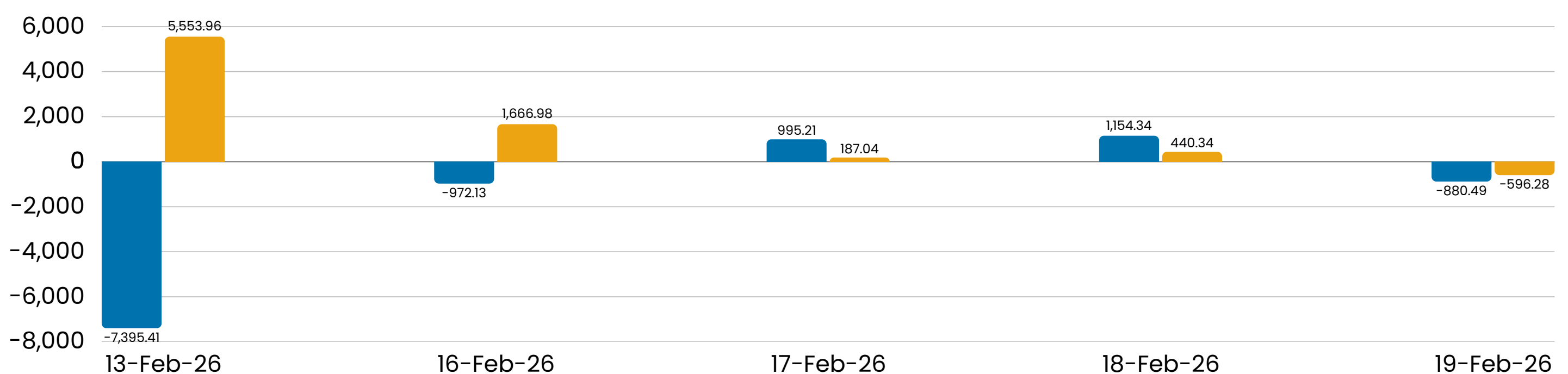
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INSTITUTIONAL INVESTMENT TRENDS

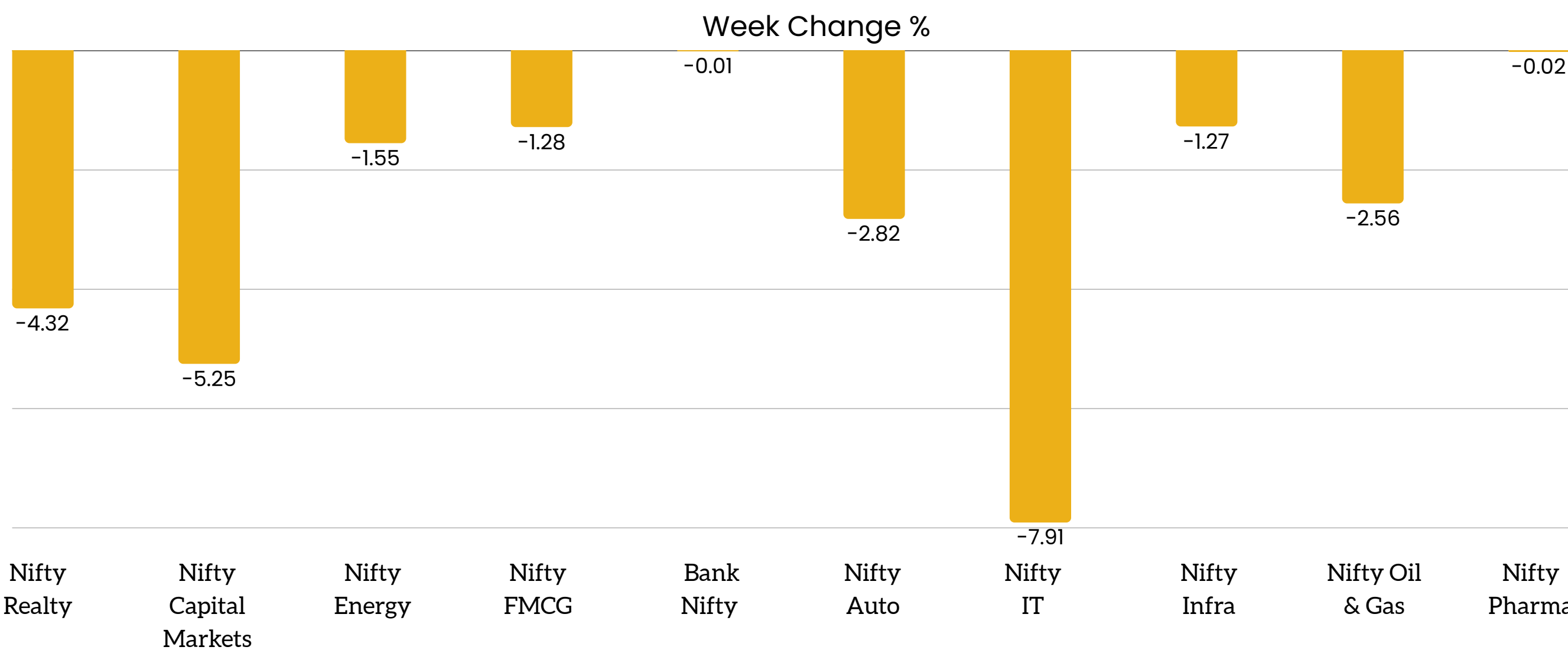
- FII recorded a net outflow of ₹7,098.48 crore, indicating continued foreign selling pressure in the markets.
- DII posted a net inflow of ₹ 7,252.04 crore, providing strong domestic support to the equity markets.

● FII Rs Crores ● DII Rs Crores



SECTORAL HIGHLIGHTS

- Bank Nifty was among the best performers, staying nearly flat as relative strength in financials limited downside.
- Pharma also outperformed the broader market, showing defensive resilience amid overall sectoral weakness.
- IT was the worst performer with a sharp fall, reflecting heavy selling pressure and continued concerns around global tech outlook.
- Capital Markets also declined steeply, indicating risk-off sentiment and profit booking in high-beta financial plays.



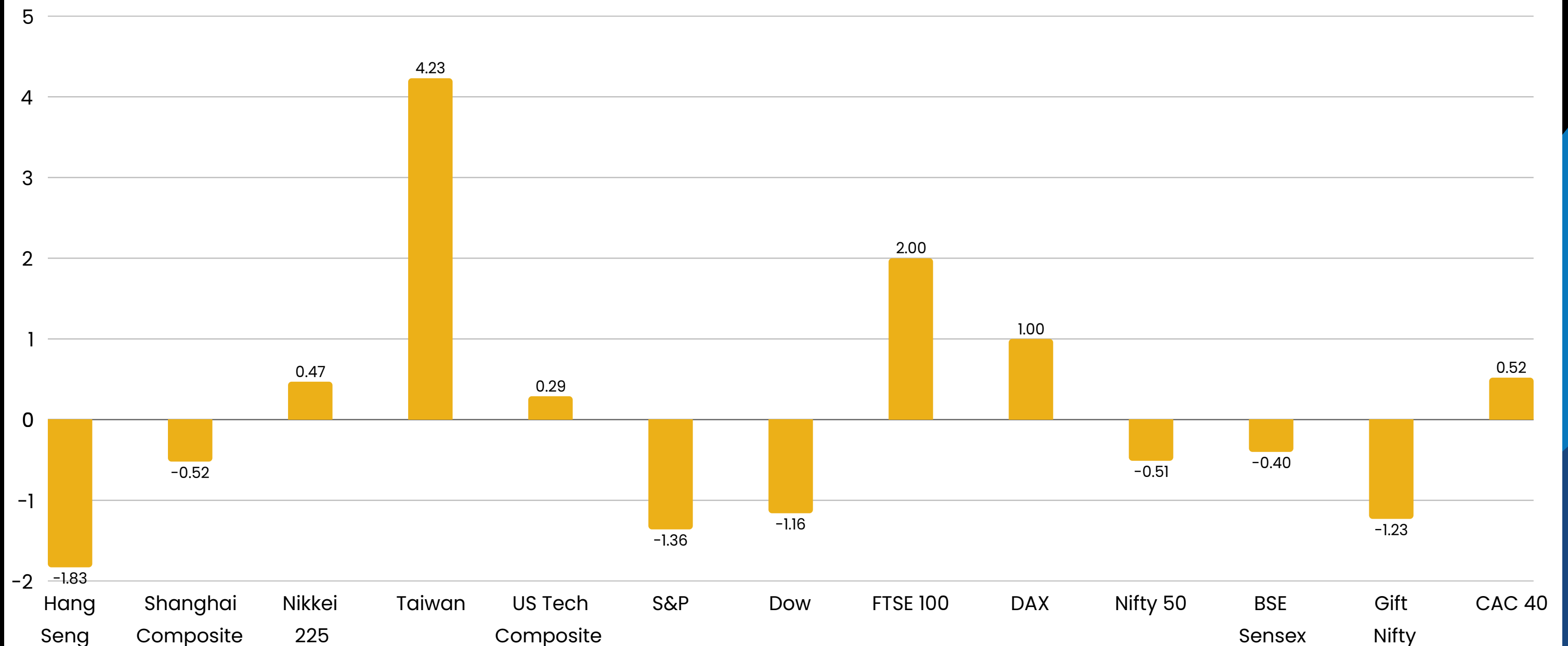
KEY MACRO ECONOMIC DATA (INDIA)

DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Jan - 2026	2.75%
INTEREST RATE	Daily	06 - Feb	5.25%
UNEMPLOYMENT RATE	Monthly	Jan-2026	5.00%
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	18 - Feb	6.68%

GLOBAL EQUITY MARKET OVERVIEW

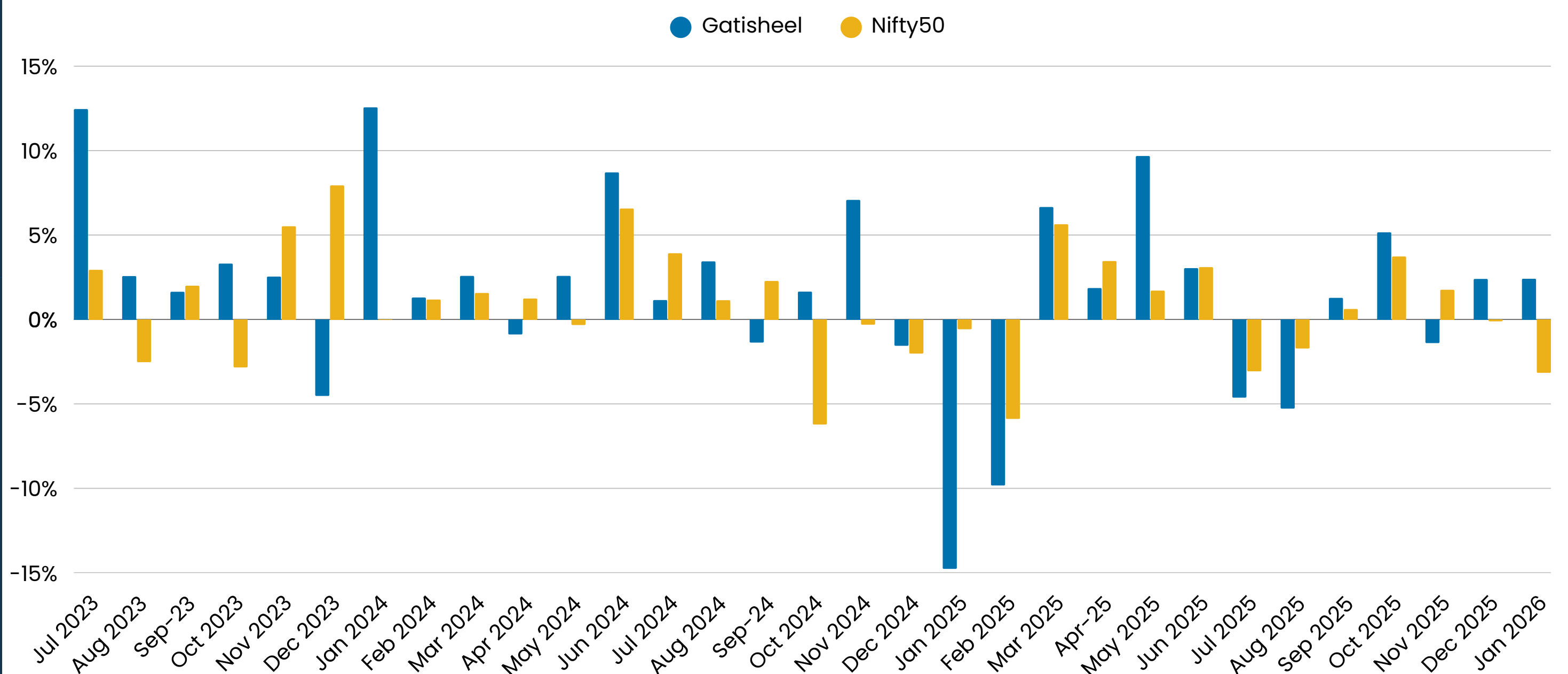
- Taiwan led global markets with a sharp ~4.23% weekly gain, standing out as the strongest performer.
- FTSE 100 showed solid strength with a ~2.00% rise, outperforming most developed market peers.
- Hang Seng was the weakest index, falling ~1.83% and reflecting heavy regional pressure.
- S&P 500 declined ~1.36%, making it one of the poorest performers among major global indices.

Week Change %



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	25,454	-0.51%
NIFTY NEXT 50	69,028	0.14%
NIFTY MIDCAP 100	59,227	-0.35%
NIFTY SMALL CAP 100	17,020	-0.07%
NIFTY LARGE & MID CAP 250	16,491	-0.6%

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

What Intelligent Investors Do When the Market Falls

When markets fall, fear spreads faster than facts. Headlines turn negative, portfolios shrink, and many investors panic. But an intelligent investor behaves very differently. Instead of reacting emotionally, they respond strategically.

As taught by Benjamin Graham in *The Intelligent Investor*, market volatility is not a threat, it is an opportunity. Intelligent investors understand that price and value are not the same. When markets decline, good businesses often become available at discounted prices. Rather than selling in fear, they evaluate whether the fundamentals of their investments have changed. If the business remains strong, falling prices may simply mean better long-term returns ahead.

An intelligent investor also maintains discipline. They avoid checking their portfolio every hour and do not make impulsive decisions based on short-term news. Corrections and bear markets are a normal part of economic cycles. Historically, markets have always recovered over time. Patience becomes a powerful advantage.

Another key action is reviewing asset allocation. During a fall, some assets decline more than others, disturbing the original allocation. A smart investor rebalances the portfolio – selling relatively stable assets and buying undervalued ones – to restore balance. This systematic approach forces them to buy low without emotional bias.

Liquidity management is equally important. Intelligent investors always keep emergency funds separate from their investments. This prevents forced selling during downturns.

Most importantly, they focus on long-term goals rather than short-term noise. Whether investing for retirement, wealth creation, or financial independence, temporary declines are just small chapters in a much bigger story.

In summary, when markets fall, the intelligent investor stays calm, reviews fundamentals, rebalances strategically, and invests with patience. While others see crisis, they see opportunity.



— Satya Bandooni (Manager - Research)

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