

PROवित्त WEEKLY MARKET वेद

21st Aug, 2026 to 27th Aug, 2026

MARKET OVERVIEW

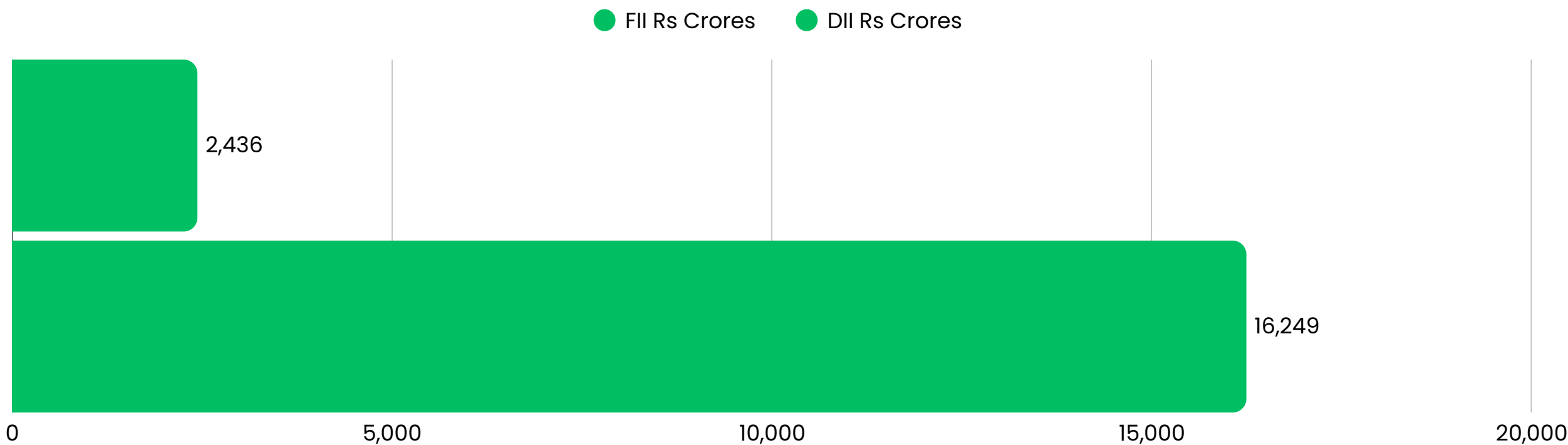
Buybacks vs. Sanctions: Markets Ride the Bond-Yield Tug-of-War

- Markets advanced as a US Treasury plan to repurchase long-dated debt eased bond yields, lifted sentiment and boosted IT and financial stocks.
- Sentiment stayed volatile as fresh US sanctions on Iran and tougher trade curbs battled against value buying and a resilient Aug 2026 Services PMI.
- Gains proved fragile as elevated crude and unresolved US-Iran tensions, with the Strait of Hormuz shut until the conflict ends, kept investors cautious.

INDEX	WEEKLY RETURN	CLOSING PRICE
Nifty 50	-0.58%	24,090
BSE Sensex	-0.78%	76,933
Nifty 500	-0.13%	23,482
Nifty Midcap 150	0.51%	23,508
Nifty Smallcap 250	0.51%	18,432

INSTITUTIONAL INVESTMENT TRENDS

- FII's turned net buyers with an inflow of ₹2,436 crore, signalling renewed foreign interest in Indian equities.
- DII's led the buying momentum with a much stronger net inflow of ₹16,249 crore, underscoring robust domestic institutional support for the market.



SECTORAL HIGHLIGHTS

- Hardware Technology (+7.37%) and Telecommunication (+5.53%) led the gains, driving a broadly positive market.
- Oil & Gas (-1.17%) and Telecom Services (-0.79%) were the biggest laggards, ending in the red.

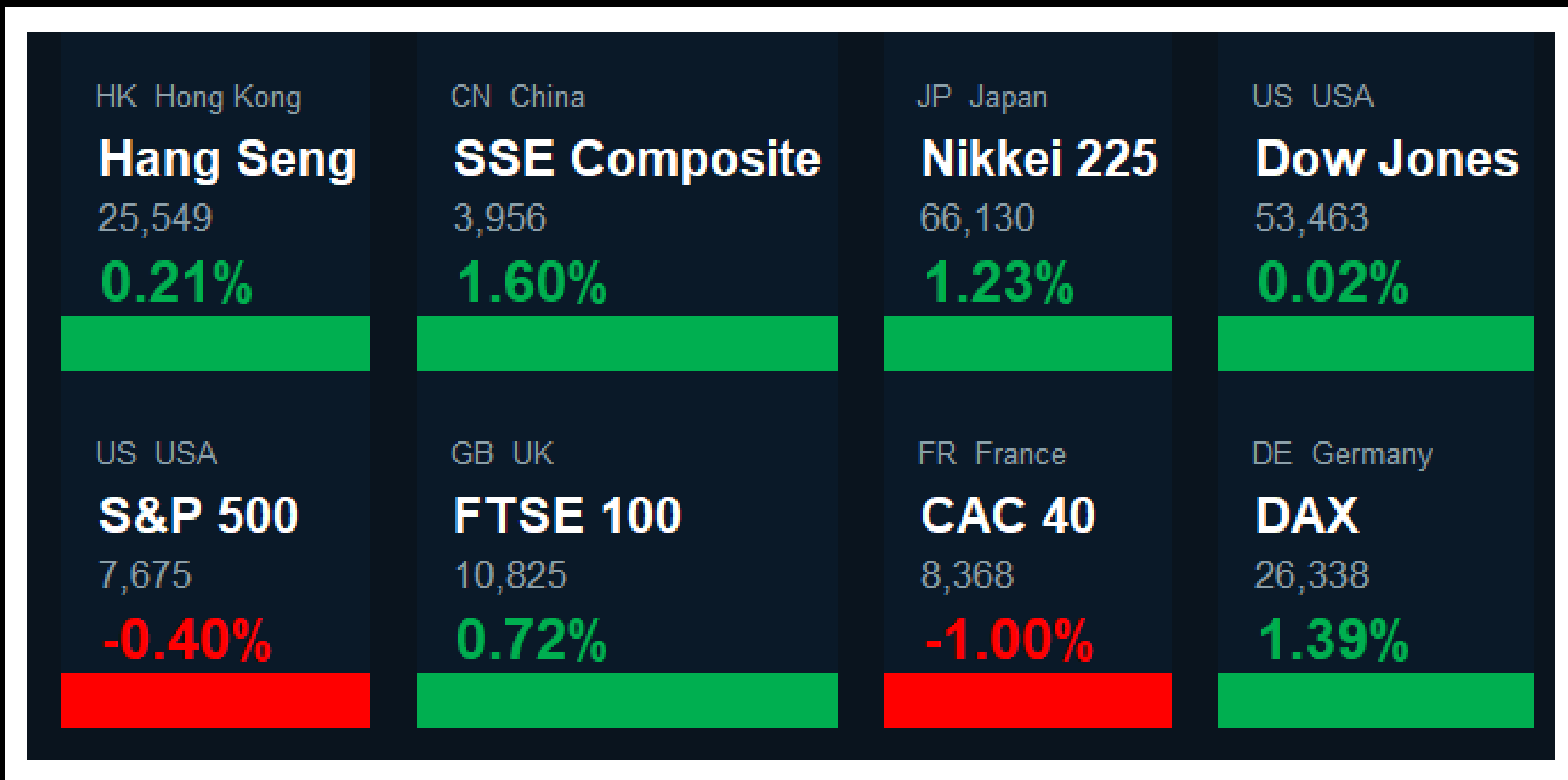
Hardware Technology 7.37%	Telecom-munication 5.53%	Commercial Services 3.52%	Metals & Mining 3.41%	Diversified Consumer 2.80%	Textiles & Apparel 1.92%
Healthcare 1.77%	Pharma 1.59%	Media 1.32%	Realty 1.23%	Transport 1.06%	Banking & Finance 1.02%
Hotels & Restaurants 0.72%	General Industrials 0.60%	Retailing 0.57%	Utilities 0.57%	Cement & Construction 0.51%	
Chemicals & Petrochem. 0.48%	Fertilizers 0.41%	Consumer Durables 0.33%	FMCG -0.22%	Software & Services -0.37%	
Forest Materials -0.40%	Food, Bev. & Tobacco -0.51%	Automobiles & Auto Comp. -0.52%	Telecom Services -0.79%	Oil & Gas -1.17%	

KEY MACRO ECONOMIC DATA (INDIA)

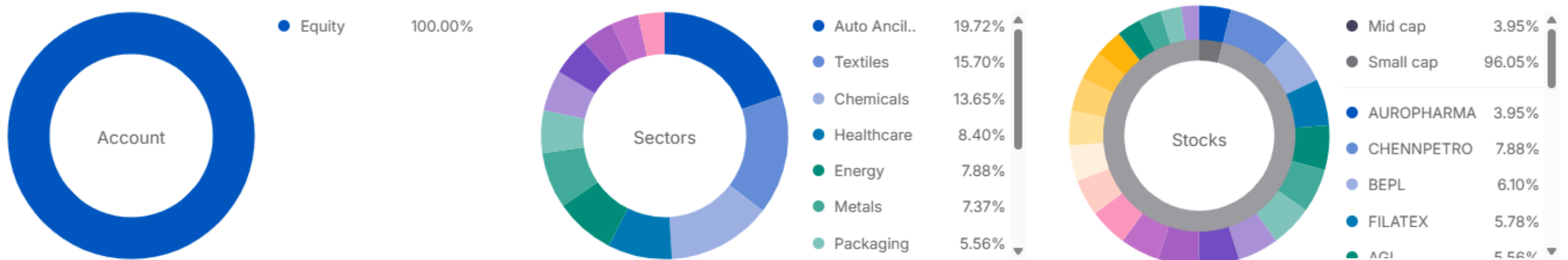
DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	July - 2026	4.45%
INTEREST RATE	Daily	05 - Aug	5.25%
UNEMPLOYMENT RATE	Monthly	July-2026	5.10%
GDP	Yearly	2025	\$3.8 Trillion
GDP Annual GROWTH RATE	Quarterly	Mar-2026	7.80%
GDP PER CAPITA	Yearly	2025	\$2880
10-YEAR GOVERNMENT BOND YIELD	Daily	Aug- 2026	6.85%

GLOBAL EQUITY MARKET OVERVIEW

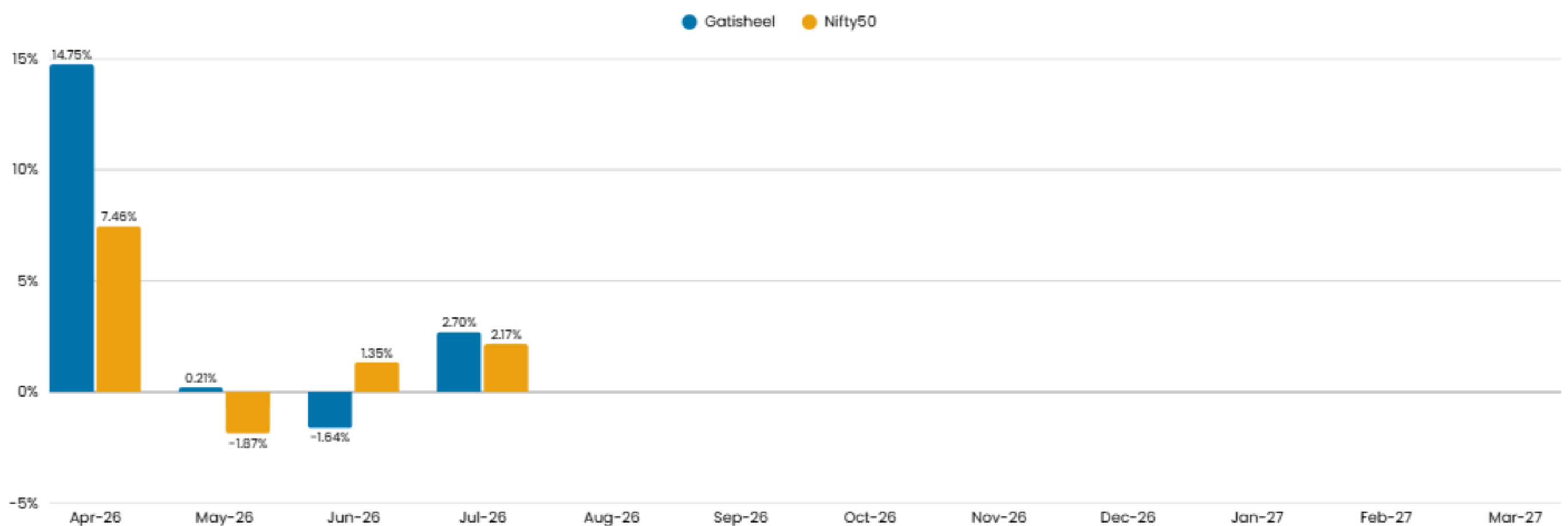
- SSE Composite (+1.60%) and DAX (+1.39%) led global gains, with markets broadly in the green.
- CAC 40 (-1.00%) and S&P 500 (-0.40%) were the only decliners, bucking the positive trend.



SECTOR & STOCK ALLOCATION – JULY 2026



PERFORMANCE COMPARISON: PROवित्त GATIशील VS NIFTY 50 (APR 2026–JULY 2026)



Note: FY 2026–27 (till date): Proवित्त Gatiशील return 16.15% (including dividend), compared to Nifty 50 return of 9.18%.

MUTUAL FUND MODEL PORTFOLIO : JULY
(01 JULY 2026 – 31 JULY 2026)

PORTFOLIO	OBJECTIVE	ASSET ALLOCATION	PORTFOLIO AGE	XIRR JUNE 2026	XIRR JULY 2026
Portfolio-1	Wealth Creation	94% Equity/ 6% Debt	10 Years 8 Months	14.84%	14.80%
Portfolio-2	Wealth Creation	90% Equity/ 10% Debt	8 Years 8 Months	15.38%	15.40%
Portfolio-3	Education	95% Equity/ 5% Hybrid	8 Years 12 Months	16.09%	16.03%
Portfolio-4	Retirement	95% Equity/ 5% Hybrid	5 Years 8 Months	18.12%	17.94%
Portfolio-5	Wealth Creation	96% Equity/ 4% Debt	6 Years 7 Months	14.89%	14.83%

Key Insights

- The portfolios delivered XIRR returns ranging from 14.80% to 17.94% in July 2026, with Portfolio-4 (Retirement) leading as the top performer, reflecting the strength of hybrid allocation strategies in the current market environment.
- All portfolios held firm around their strong June levels, staying resilient in the 14.80% to 17.94% range even as escalating geopolitical tensions and surging crude oil prices tested the broader market during the month.
- Despite short-term fluctuations, the portfolios maintain a strong long-term track record, and staying invested across equity-dominant allocations continues to be the key driver of consistent compounding.

SUGAR STINGS INDIAN KITCHENS AS NVIDIA’S AI MACHINE ROARS ON

Retail sugar nears ₹65/kg on a supply crunch — Nvidia posts a record \$96 bn quarter

SUGAR · THE SPIKE

₹65/kg

Retail sugar's modal price touched ₹65/kg by late August, up from ₹48 in July — near a record high.

SUGAR · THE CAUSE

30.6 MT

Output is seen at just 30.6 MT vs 34.3 MT expected, on crop disease and waterlogging — plus festive demand and a global deficit.

SUGAR · GOVT ACTS

CURBS

Delhi imposed dealer stock limits and a 1 MT duty-free import quota , calling the ex-mill jump “not acceptable.”

NVIDIA · THE BLOWOUT

\$96.2 BN

Q2 revenue hit a record \$96.2 billion , up 106% YoY and 18% on the quarter, at a 75% margin .

NVIDIA · DATA CENTER

\$89 BN

Data-center sales soared 117% to \$89 bn . EPS of \$2.22 beat estimates as AI demand stayed red-hot.

NVIDIA · THE GUIDE

\$108 BN

Nvidia guided Q3 to \$108 billion (~89% YoY). “Compute is revenue,” said CEO Jensen Huang.

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Email: info@provittconsultants.com | Principal Officer Email: shalini@provittconsultants.com

Toll-Free Number: 1800 202 3772 | Contact No.: +91-9266207888

Address: Plot No 7, Third Floor, Block C, Pocket 8, Sector 17, Dwarka, New Delhi-110078

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