

PROवित्त MONTHLY MARKET वेद

1st Sep, 2026 to 30th Sep, 2026

MARKET OVERVIEW

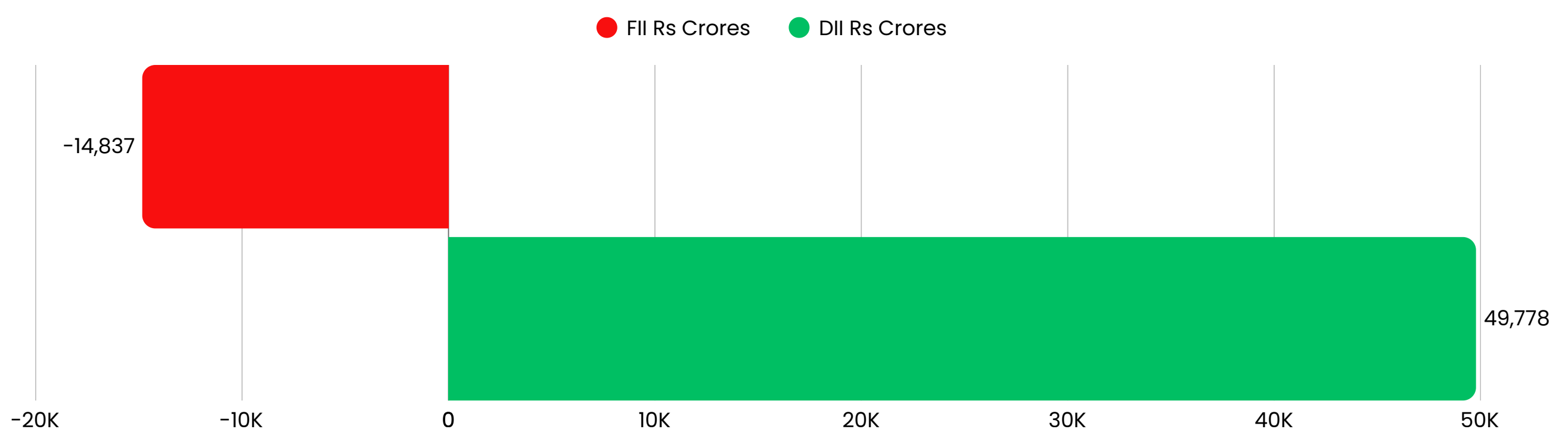
September Storm: Oil, the Fed and a Record-Low Rupee Shake Dalal Street

- Indian equities suffered their worst month of the year, with the Nifty and Sensex sliding around 5.7% to near six-month lows.
- Sentiment was battered by the US Fed's first rate hike since 2023, Brent crude holding above \$100 on Strait of Hormuz tensions, and the rupee slipping past a record 96 per dollar.
- Despite the turmoil, strong domestic inflows and a robust 7.8% Q1 GDP print offered a silver lining and cushioned the broader fall.
- Global bond yields stayed elevated, with the US 30-year Treasury near multi-decade highs, keeping pressure on equities worldwide.

INDEX	MONTHLY RETURN	CLOSING PRICE
Nifty 50	-6.43%	22,620
BSE Sensex	-6.19%	72,480
Nifty 500	-6.19%	22,072
Nifty Midcap 150	-6.98%	21,867
Nifty Smallcap 250	-3.77%	17,798

INSTITUTIONAL INVESTMENT TRENDS

- FII were net sellers with a heavy outflow of ₹14,837 crore, reflecting sustained foreign selling pressure.
- DII were net buyers with a strong inflow of ₹49,778 crore, underscoring robust domestic institutional support.



SECTORAL HIGHLIGHTS

- Telecommunication (+7.56%) and Hardware Technology (+6.51%) led the gains, standing out in a broadly weak market.
- Diversified (-9.03%) and Software & Services (-8.60%) were the biggest laggards, dragging sentiment sharply lower.

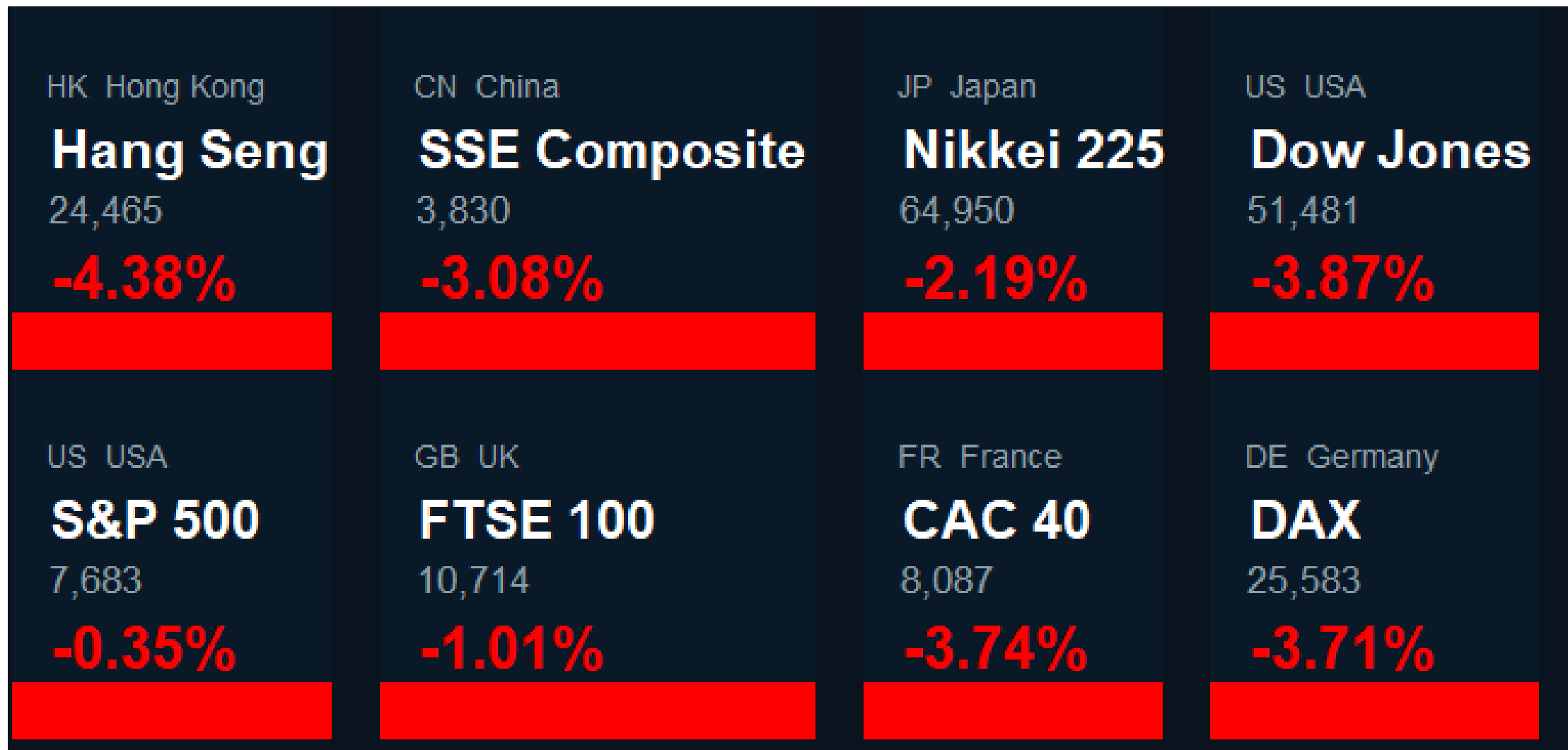
Telecom- munication 7.56%	Hardware Technology 6.51%	Media 5.77%	Transport 0.81%	Hotels & Restaurants -0.98%	Pharma -1.09%
Textiles & Apparel -1.47%	Diversified Consumer -2.00%	Cement & Construction -2.23%	General Industrials -2.45%	Commercial Services -2.52%	Utilities -3.15%
Retailing -3.20%	Others -3.24%	Food, Bev. & Tobacco -3.44%	Metals & Mining -3.45%	Chemicals & Petrochem. -3.73%	Realty -3.95%
Forest Materials -5.01%	FMCG -5.29%	Oil & Gas -5.72%	Consumer Durables -5.77%	Healthcare -6.01%	Fertilizers -6.05%
Banking & Finance -6.10%	Automobiles & Auto Comp. -6.50%	Telecom Services -6.87%	Software & Services -8.60%	Diversified -9.03%	

KEY MACRO ECONOMIC DATA (INDIA)

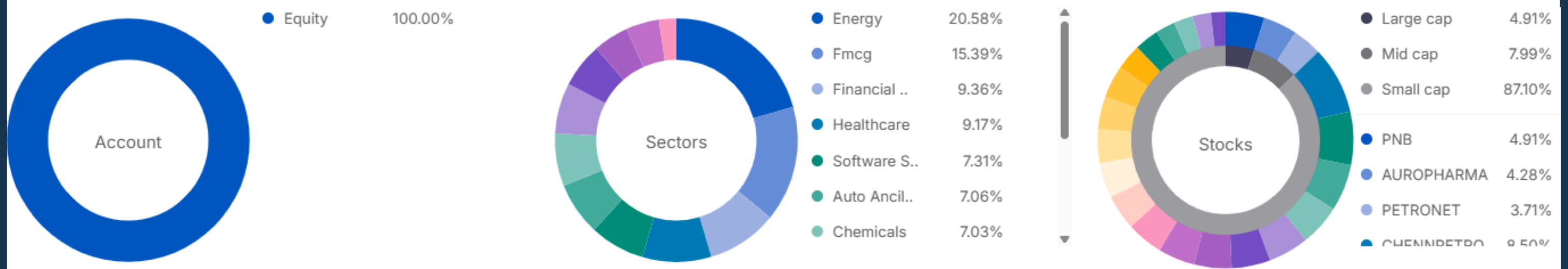
DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Aug- 2026	4.82%
INTEREST RATE	Daily	05 - Aug	5.25%
UNEMPLOYMENT RATE	Monthly	Aug-2026	5.00%
GDP	Yearly	2025	\$3.8 Trillion
GDP Annual GROWTH RATE	Quarterly	June-2026	7.80%
GDP PER CAPITA	Yearly	2025	\$2523
10-YEAR GOVERNMENT BOND YIELD	Daily	Sep- 2026	7.17%

GLOBAL EQUITY MARKET OVERVIEW

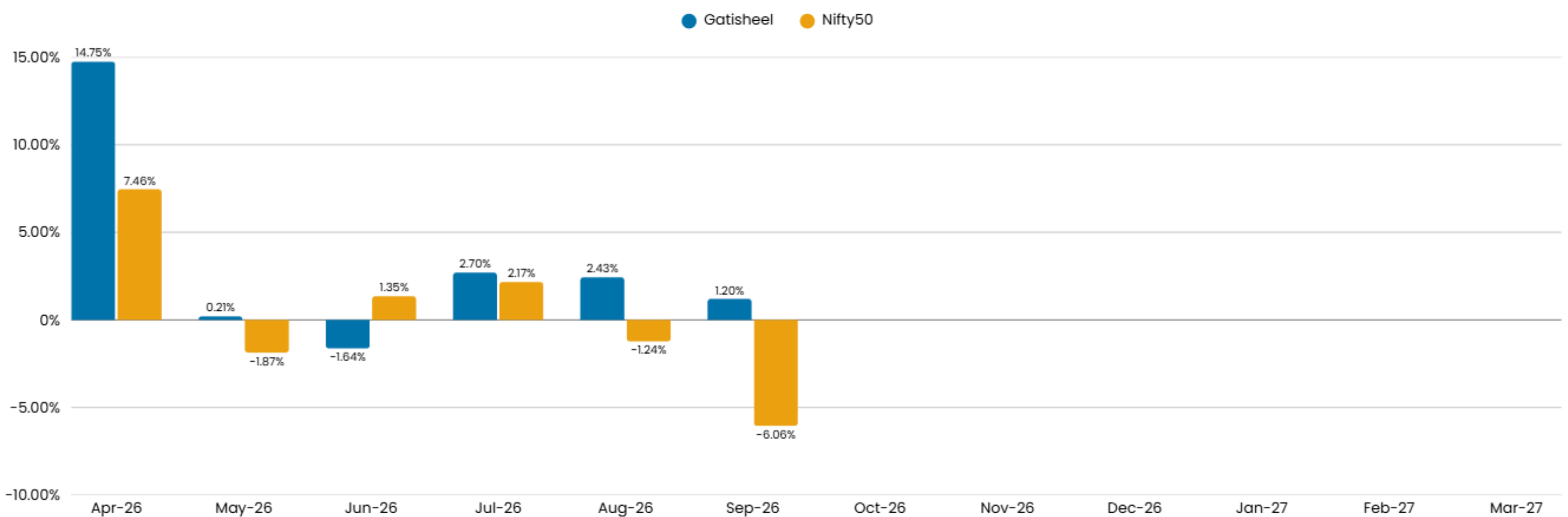
- S&P 500 (-0.35%) and FTSE 100 (-1.01%) held up best, limiting their losses in a broad sell-off.
- Hang Seng (-4.38%) and Dow Jones (-3.87%) were the weakest performers, leading a sharp global decline.



SECTOR & STOCK ALLOCATION – SEP 2026



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



Note: FY 2026–27 (till date): Proवित्त Gatiशील return 19.51% (including dividend), compared to Nifty 50 return of -0.26%.

MUTUAL FUND MODEL PORTFOLIO : SEP

(01 SEP 2026 – 30 SEP 2026)

PORTFOLIO	OBJECTIVE	ASSET ALLOCATION	PORTFOLIO AGE	XIRR AUG 2026	XIRR SEP 2026
Portfolio-1	Wealth Creation	94% Equity/ 6% Debt	10 Years 8 Months	15.01%	14.12%
Portfolio-2	Wealth Creation	90% Equity/ 10% Debt	8 Years 8 Months	15.62%	14.44%
Portfolio-3	Education	95% Equity/ 5% Hybrid	8 Years 12 Months	16.21%	15.55%
Portfolio-4	Retirement	95% Equity/ 5% Hybrid	5 Years 8 Months	18.11%	17.16%
Portfolio-5	Wealth Creation	96% Equity/ 4% Debt	6 Years 7 Months	15.04%	14.42%

Key Insights

- The portfolios delivered healthy XIRR returns ranging from 14.12% to 17.16% in September 2026, with Portfolio-4 (Retirement) leading as the top performer, reflecting the strength of hybrid allocation strategies.
- The portfolios showcased their resilience, holding firm in double-digit XIRR territory even as a challenging month of elevated crude and global headwinds tested the broader market.
- 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.

A BRUTAL SEPTEMBER: STOCKS SINK AS THE FED HIKES AND OIL BITES

Nifty & Sensex fell ~5.7% — the Fed’s first hike since 2023, \$100+ crude and a record-low rupee drove it

THE MONTH · SEP

-5.7%

The Nifty 50 and Sensex each fell about **5.7% in September** , their worst month of 2026, with Sensex near a six-month low.

THE FED

+25 BPS

The Fed raised rates to **3.75-4.00%** on Sept 16 — its **first hike since 2023** — and hinted at one more.

CRUDE STAYS HOT

\$107

Brent topped **\$107 a barrel** on Strait of Hormuz supply fears, holding above **\$100 all month** .

THE RUPEE

₹96

The rupee sank past **96 per dollar** to a record low; the **RBI spent reserves** defending the level.

FOREIGN EXIT

\$2.7 BN

FPIs pulled about **\$2.7 billion** (₹25,662 cr) from equities — the **biggest monthly outflow in six months** .

DOMESTIC SHIELD

3X

DIIIs bought nearly **₹52,617 crore** , about **3x the foreign selling** , cushioning the fall.

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