

PROवित्त WEEKLY MARKET वेद

20th Mar, 2026 to 26th Mar, 2026

MARKET OVERVIEW

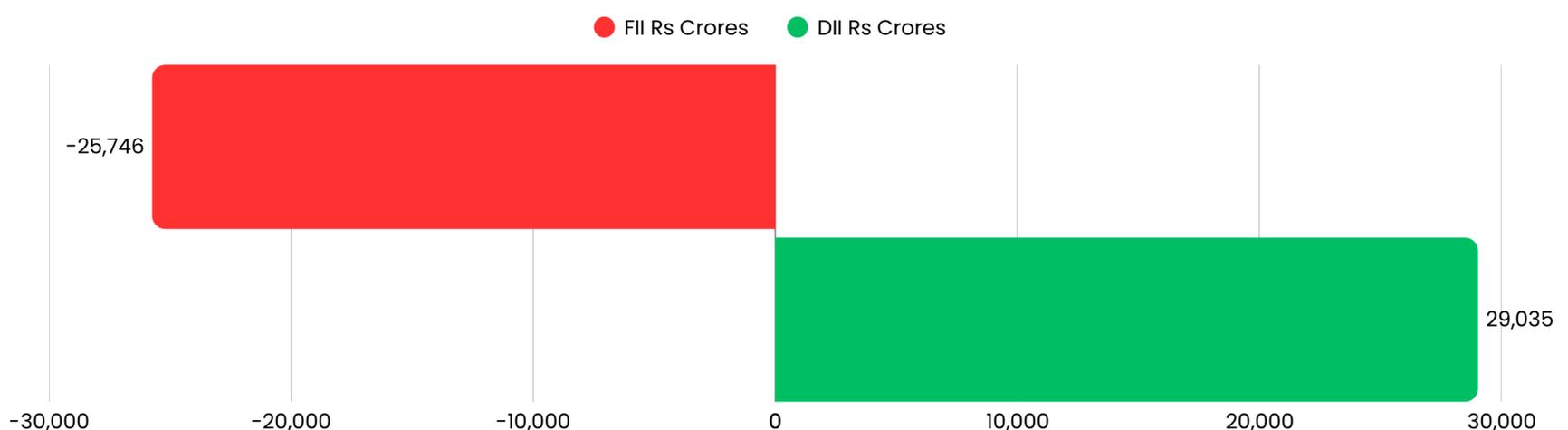
Indian Markets Navigate Geopolitical Turbulence: From Sell-Off to Recovery

- Indian equity markets faced sharp sell-offs driven by escalating Middle East geopolitical tensions, rising crude oil prices, and hawkish U.S. Federal Reserve signals raising inflationary concerns for oil-importing economies like India.
- Markets witnessed high volatility with broad-based selling pressure across cyclical and rate-sensitive sectors, though bargain buying emerged at lower levels as crude prices stabilized following signals that the Israel-Iran conflict could de-escalate sooner than anticipated.
- A strong rebound followed as geopolitical tensions eased, energy prices stabilized, and risk appetite improved, with broad-based buying across cyclical and financial stocks, though underlying caution persisted amid global uncertainty and foreign fund outflows.

INDEX	WEEKLY RETURN	CLOSING PRICE
Nifty 50	0.09%	23,306
BSE Sensex	0.45%	75,273
Nifty 500	-0.25%	21,473
Nifty Midcap 150	-1.68%	20,397
Nifty Smallcap 250	-1.43%	14,937

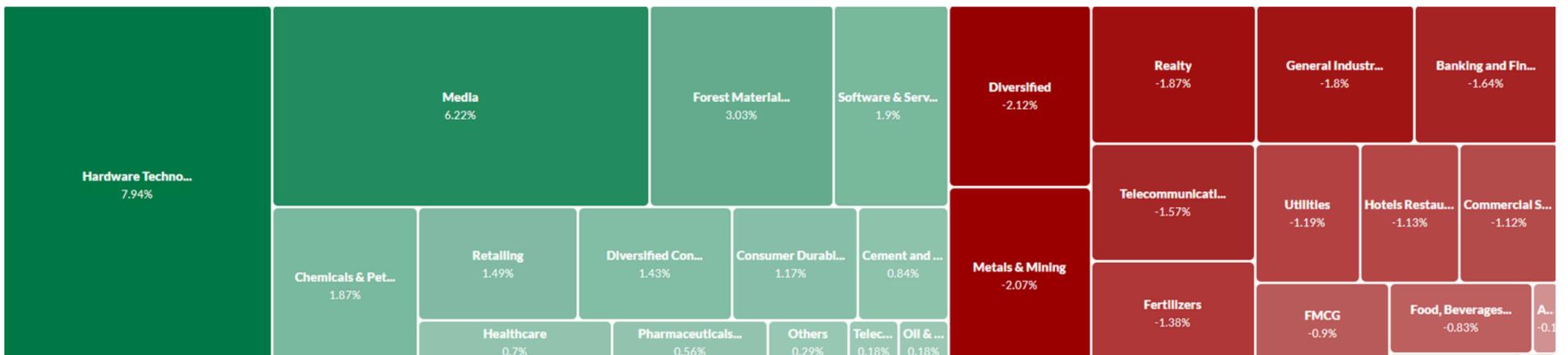
INSTITUTIONAL INVESTMENT TRENDS

- FII recorded a net outflow of ₹25,746 crores, reflecting foreign investor caution amid global uncertainties and geopolitical tensions.
- DII countered with a strong net inflow of ₹29,035 crores, signaling robust domestic institutional confidence and support to the market.



SECTORAL HIGHLIGHTS

- Best performing: Hardware Technology (+7.94%) and Media (+6.22%) emerged as the top-performing sectors, leading market gains during the week.
- Worst performing: Diversified (-2.12%) and Metals & Mining (-2.07%) were the worst-performing sectors, bearing the brunt of risk-off sentiment.

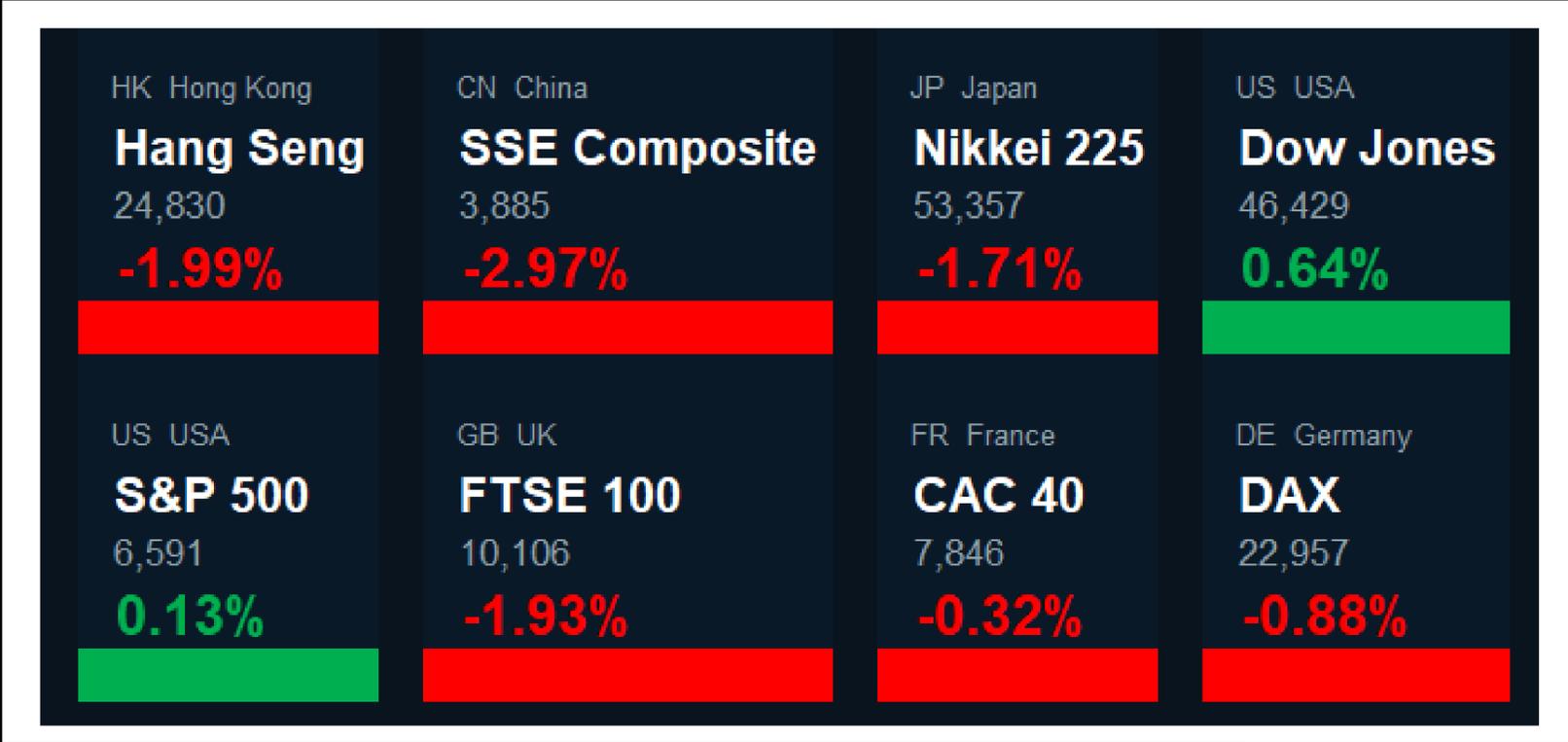


KEY MACRO ECONOMIC DATA (INDIA)

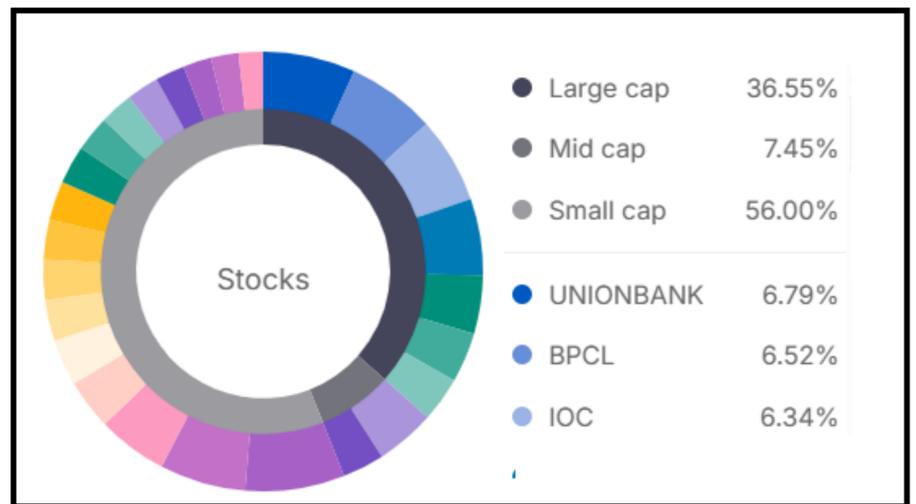
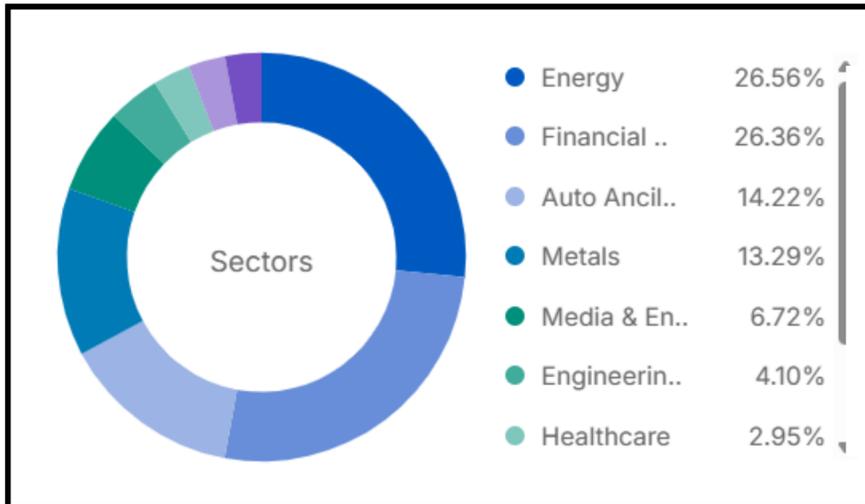
DATA	FREQUENCY	LAST UPDATE	VALUE
INFLATION RATE (CPI)	Monthly	Feb - 2026	3.21%
INTEREST RATE	Daily	06 - Feb	5.25%
UNEMPLOYMENT RATE	Monthly	Feb-2026	4.90%
GDP	Yearly	2025	\$3.8 Trillion
GDP Annual GROWTH RATE	Quarterly	Dec-2025	7.80%
GDP PER CAPITA	Yearly	2025	\$2880
10-YEAR GOVERNMENT BOND YIELD	Daily	25 - Mar	6.87%

GLOBAL EQUITY MARKET OVERVIEW

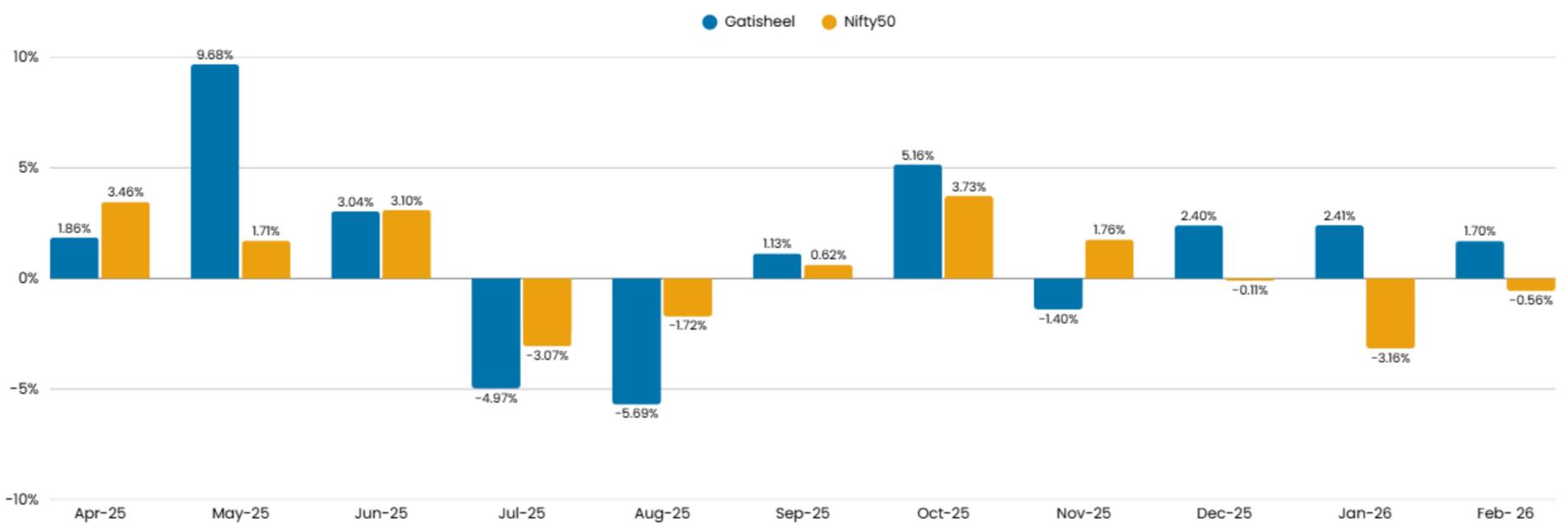
- Best performing: Dow Jones (+0.64%) and S&P 500 (+0.13%) were the best-performing indices, reflecting resilience in the U.S. markets amid global uncertainty.
- Worst performing: SSE Composite (-2.97%) and Hang Seng (-1.99%) were the worst-performing indices, as Asian markets faced the sharpest declines during the period.



SECTOR & STOCK ALLOCATION – FEB 2026



PERFORMANCE COMPARISON: PROवित्त GATIशील VS NIFTY 50 (APR 2025–FEB 2026)



Note: FY 2025–26 (till date): Proवित्त Gatiशील return 16.85% (including dividend), compared to Nifty 50 return of 8.68%.

MUTUAL FUND MODEL PORTFOLIO : FEBRUARY

(01 Feb 2026 – 28 Feb 2026)

PORTFOLIO	OBJECTIVE	ASSET ALLOCATION	PORTFOLIO AGE	XIRR JAN 2026	XIRR FEB 2026
Portfolio-1	Wealth Creation	94% Equity/ 6% Debt	10 Years 5 Months	18.69%	18.41%
Portfolio-2	Wealth Creation	90% Equity/ 10% Debt	8 Years 5 Months	16.52%	16.27%
Portfolio-3	Education	80% Equity/ 20% Hybrid	8 Years 9 Months	20.78%	20.66%
Portfolio-4	Retirement	100% Equity	5 Years 5 Months	20.85%	20.51%
Portfolio-5	Wealth Creation	93% Equity/ 7% Debt	6 Years 5 Months	22.63%	22.31%

Key Insights

- The portfolios continue to generate strong long-term returns of around 16%–22%, with the best performer delivering about 22.3% annual return, showing consistent wealth creation over time.
- Returns saw a small dip in February (for example, 18.69% to 18.41%) mainly due to short-term market fluctuations, but the overall long-term performance remains stable.
- Portfolios with higher equity exposure (80%–100%) are delivering stronger returns, while the small allocation to debt/hybrid funds helps reduce risk and maintain stability.

HDFC Bank chairman quits over ethics — stock bleeds ₹1 lakh crore

India's biggest private bank faces its worst governance storm in years

-12%
STOCK FALL

₹1L Cr
MARKET CAP LOST

₹799
SHARE PRICE

Part-time chairman Atanu Chakraborty resigned on March 18, citing practices “not in congruence with his values and ethics” — without naming a single specific concern.

The cryptic exit triggered a 12% stock plunge, wiping out nearly ₹1 lakh crore in market value. A deeper boardroom battle has since emerged — Chakraborty reportedly clashed with CEO Sashidhar Jagdishan over management autonomy and oversight. The RBI swiftly approved Keki Mistry as interim chairman and reaffirmed the bank's sound financials. HDFC Bank has since appointed law firms Wadia Ghandy and Trilegal to investigate the resignation. With Jagdishan's term ending in October 2026 and no permanent chairman yet named, investors remain cautious.

ALSO IN FOCUS — DUBAI AT1 BONDS SCANDAL

Three executives fired over Credit Suisse bond mis-selling

HDFC Bank's Dubai DIFC branch terminated three senior executives following an internal probe into the alleged mis-selling of Credit Suisse AT1 bond bonds to clients. These high-risk bonds were wiped out during Credit Suisse's emergency rescue in 2023, causing heavy losses to investors. The Dubai Financial Services Authority had already barred the DIFC branch from onboarding new clients over gaps in client-onboarding compliance. The bank confirmed the terminations on March 9, 2026, adding a fresh layer of operational and reputational scrutiny at an already turbulent time.

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