

# Weekly Market

## Overview

27.04.2026



**01**

# Global Market Overview

- Global equity markets have shown resilience with positive momentum across major indices, with US markets gaining **~0.5%** and NASDAQ **~1.5%** over the past week.
- Asian markets are stabilizing, supported by easing geopolitical concerns and improving sentiment.
- Commodities remain elevated, with gold at **~\$2,740 (up ~8% YTD)**, silver also up **~8% YTD**, and crude oil near **~\$105**, reflecting ongoing macro uncertainties.
- Interest rates globally remain steady, with US 10-year yields at **~4.31%** and Indian 10-year yields **~6.95%**.

# Market Performance

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NIFTY

↗ ~0.62%

S&P 500

↗ ~0.80%

NASDAQ

↗ ~1.63%

Hang Seng Index

↘ ~0.12%

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# Geopolitical Developments & Implications

- Recent tensions impacting key global trade routes have significantly disrupted movement, with vessel traffic dropping from ~140 ships daily to single digits in affected regions.
- Supply-side disruptions have begun impacting global supply chains, particularly in Asia.
- Early signs of easing pressures are emerging, supported by global trade dependencies and external diplomatic influence.

# Institutional Positioning & Market Sentiment

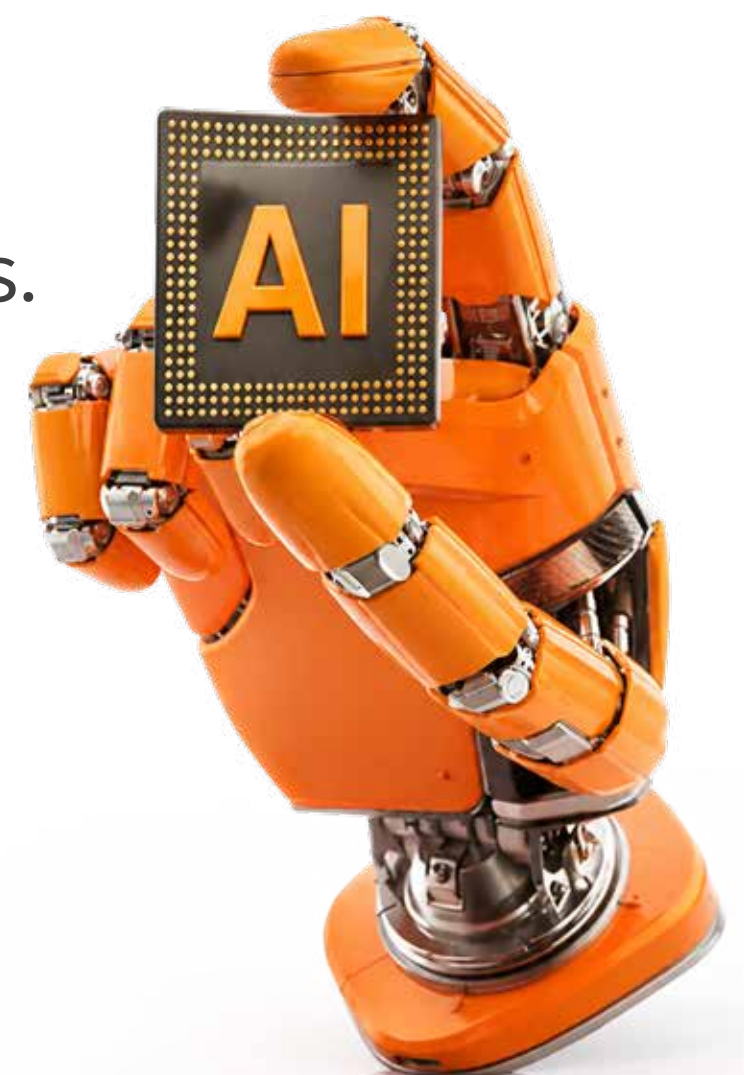
- Global institutional investors are increasing equity exposure, with active manager allocation indices rising ~**20%** over the past four weeks.
- Hedge fund leverage has increased to ~**77%**, indicating improved risk appetite.
- Positioning remains below previous peaks, reflecting cautious but improving sentiment.

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# Technology & AI as a Structural Theme

AI surge reshapes global capital markets

- Artificial Intelligence has expanded significantly, growing from **~25% to ~45%** of major index market cap since late 2022.
- AI-linked debt now constitutes **~15%** of investment-grade credit markets, with total capital raised exceeding **~\$1.4 trillion**.
- Long-term AI capex is projected between **\$3.5 trillion to \$8 trillion**, driven by investments in data centers (**\$1.5 trillion**), IT infrastructure (**\$3 trillion**), and power (**~\$300 billion**).
- The scale and influence of AI as an investment theme remain unprecedented across asset classes.



# Global Market Shifts

## Semiconductor surge reshapes markets

- Certain markets have seen significant structural growth, with Taiwan's market capitalization surpassing **\$4.14 trillion**, overtaking the UK (**\$4.1 trillion**) for the first time.

Taiwan's market has nearly tripled over the past six years, driven largely by semiconductor leadership.

Strong foreign inflows (~**\$9 billion** in April alone) highlight concentrated capital allocation towards high-growth sectors.

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# Corporate Earnings & Capex Trends

Earnings surge fuels capex revival

- Corporate earnings growth remains strong, with **~14%** profit growth overall and **~19%** excluding BFSI and oil & gas sectors.
- This marks one of the strongest earnings growth phases in the past 10 quarters.
- Private sector capex is witnessing a sharp revival, growing **~40%**, led by manufacturing, infrastructure, and power sectors.



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