

Weekly Market

Overview

30.03.2026

The background features a stylized orange line graph with circular markers, a bar chart at the bottom, and a large orange sun on the right side. The overall color palette is orange and white.

01

Macroeconomic & Regulatory Developments

- RBI's announcement of a **\$100 million** limit on banks' net INR positions has pushed Nifty, mid-cap, and Bank Nifty lower, with banks likely holding dollar positions far above the cap.
- Recent regulatory measures impacting banking system liquidity and currency positioning have led to near-term volatility in equity markets.
- Broader market indices, including large-cap and banking segments, have experienced pressure following these developments.

Market Performance

02

NIFTY



~1.23%

S&P 500



~1.67%

NASDAQ



~2.15%

Hang Seng Index



~0.90%

03

Global Economic Environment

- Rising inflation expectations and Fed rate hike probability signal limited near-term rate cuts amid global slowdown and geopolitical tensions.
- Elevated inflation expectations and the possibility of continued tight monetary policy globally suggest a cautious near-term outlook.
- Ongoing geopolitical tensions and slowing global growth continue to influence market sentiment.

Energy Markets & Geopolitical Impact

- Iran's daily oil revenue rose to nearly **\$25 million**, boosting its war-financing and transit fees while influencing global oil prices and gold market dynamics.
- Rising oil revenues in key producing regions are contributing to sustained volatility in global energy prices.
- Prolonged geopolitical conflicts are disrupting supply chains, leading to elevated oil and gas prices, particularly impacting Asian markets.

05

Implications for India

Oil shocks threaten India's earnings growth

- Oil price rises can reduce India's earnings growth by nearly **9%**.
- Past oil supply shocks have historically downgraded Indian earnings by **6% to 13%**.
- Higher oil prices historically have had a negative impact on corporate earnings growth in India.
- Continued energy price volatility may result in downward revisions to growth expectations.



Market Outlook

Caution urged amid volatility and slower growth

- The speaker predicts a faster market close, recommends staggered investing, and highlights value stocks with low energy dependence as attractive opportunities.
- Current conditions indicate potential moderation in growth expectations and cautious equity market performance.
- Increased volatility may persist in the near term, warranting a measured investment approach.

06



07

Fixed Income Considerations

Shift to fixed income amid equity slowdown

- Fixed income and structured products reduce opportunity cost during low equity demand.
- Domestic inflows may slow as investors face their first downturn.
- Fixed income instruments may offer relatively stable returns and help mitigate opportunity costs during periods of subdued equity performance.
- Shifts in investor flows may occur as markets experience cyclical adjustments.



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