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WEEKLY MARKET BRIEF

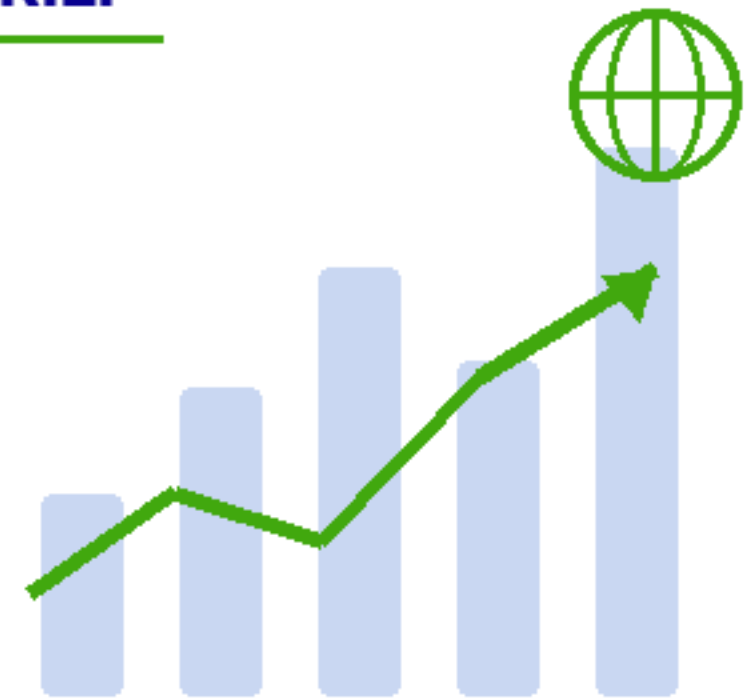
Weekly Market Brief

Oil eases, the rally extends — but leadership is shifting

22-26 JUNE 2026

A 5-slide investor brief from this week's newsletter — key numbers, live risks, market signals and action points.

WEEKLY BRIEF



Signals. Strategy. Clarity.



Sensex Close

77,101

3rd weekly gain



Brent Crude

~\$73.5

Below pre-war



SIP Inflows

₹30,954 Cr

May reading



Monsoon Deficit

41%

Key inflation risk

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WEEKLY BRIEF | BIG PICTURE

Macro tone improved Leadership is shifting

Lower oil, calmer RBI commentary, resilient SIPs and a near-final India-US trade deal were positives. But market breadth is thinning and IT's structural slide is reshaping leadership.

Positive

Oil relief is real

Lower oil helps India's import bill, inflation and current account.

Positive

RBI tone cooled fears

Rate-hike discussion was called premature; yields eased.

Caution

Breadth is thinning

Avoid treating the index gain as a broad-market signal.

Caution

IT leadership is shifting

Do not assume IT automatically regains its old Nifty leadership.



BlissMoney View

Stay constructive, but selective. Sector selection matters more than a simple index view.

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WEEKLY BRIEF | SIX SIGNALS

Six signals that matter now

Each one matters. Together, they show why the rally needs a selective lens.

01

Third weekly gain

Stay constructive, but don't treat the index as broad-market confirmation.

02

Oil relief is real

Lower oil helps India, but waiver and insurance risks keep it fluid.

03

RBI tone is calmer

Rate-hike fears cooled; monsoon and inflation are still the checks.

04

Rupee pressure

Dollar strength means currency risk is not only an India story.

05

SIP discipline

₹30,000 Cr+ SIP flows are cushioning volatility.

06

Monsoon + IT risks

Track food inflation and avoid assuming IT regains old leadership.

Portfolio lens: the rally is improving, but leadership is narrowing.

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WEEKLY BRIEF | WHAT TO WATCH

The next swing factors

Five triggers that can decide whether the July market tone stays supportive or turns cautious.

1

US-Iran talks + waiver window

Determines whether oil relief sustains or reverses quickly.

2

India-US trade deal signing

Tariff advantage can help textiles, pharma and engineering exports.

3

Monsoon progress through July

Key risk for food inflation, rural demand and RBI's rate path.

4

Fed commentary + dollar index

Drives rupee pressure and foreign-flow sentiment into Q3.

5

Global AI correction + IT earnings

Tests whether tech weakness is a pullback or deeper de-rating.

Watch the triggers, not just the index.

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WEEKLY BRIEF | CLIENT ACTIONS

4 portfolio actions for the week

The market message is not "risk-on everywhere." It is: stay invested, review exposures, and keep plans goal-led.

1

Keep SIPs running

Use volatility for disciplined accumulation.



2

Review leadership shift

Financials, autos, industrials and consumer discretionary are gaining attention beyond IT.



3

Don't stretch duration yet

RBI commentary helps, but monsoon and Q3 inflation still matter.



4

Recheck dollar-linked goals

Review overseas education, travel, export exposure and global allocation needs.



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