Datum | MARKET INTELLIGENCE

FESTIVE BAROMETER 2026 / NOVEMBER 2026

India Festive 2026

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From the September Outlook to the 9 November outcome

Player data carries the platforms' own published figures; payments data is RBI's daily card and UPI series. **Everything is updated to 9 November, the day after Diwali.**

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Sales rose 17 per cent to ₹1.41 lakh crore on more, smaller orders

The Outlook expected ₹1,50,000 to 1,55,000 crore. Over 34 sale days to 9 November the season delivered ₹1,40,800 crore, against ₹1,20,000 crore in 2025. **Card transactions rose 7 per cent, but the average payment fell 13 per cent and phones lost ten points of share. The season finished ₹9,200 to 14,200 crore short of the Outlook.**

PART ONE, PLAYER DATA

Demand widened: more buyers, more of them in smaller towns

Flipkart grew orders, units and buyers 20 to 22 per cent over Big Billion Days. Amazon doubled units in its first 12 hours and drew 72 per cent of visits from beyond the top nine metros. **Quick commerce took about 16 per cent of the season**, up from 12.

~16%
Quick commerce share of the season
from 12 per cent in 2025

PART TWO, PAYMENTS DATA

Baskets shrank: each card payment was worth 13 per cent less

Over the 32 sale days card transactions rose 7 per cent and value fell 6, so **the average payment fell to about ₹5,970**. 2025 opened on the GST rate cut, which lifted big tickets; 2026 had no such boost, and pricier phones sold fewer units.

–13%
Average online card payment
₹5,970 against ₹6,830, D1 to D32

PART THREE, THE SEASON

The season ran later: the Diwali run-up beat 2025 by 12 to 13 per cent

Early access and week 1 took 34 per cent of sales. On cards, weeks 2 and 3 trailed 2025 by 16 to 20 per cent; week 4 and the last four days ran 12 and 13 per cent ahead. **2026 passed 2025's whole season on D27.**

+17%
On 2025's ₹1,20,000 crore
₹1,40,800 crore in 34 sale days

WHAT IT MEANS

Growth now comes from reach and frequency; the big-ticket basket is shrinking

Phones fell to about a quarter of sales and cost 5 points of growth, while everything else grew about 35 per cent. **Plans built on the opening day and big tickets will under-deliver; the money is in smaller towns and in the weeks before Diwali.**

35% → 25%
Mobiles' share of the season
2025 to 2026

Sources: Datum festive model; RBI; company releases; Datum 2026 Festive Outlook

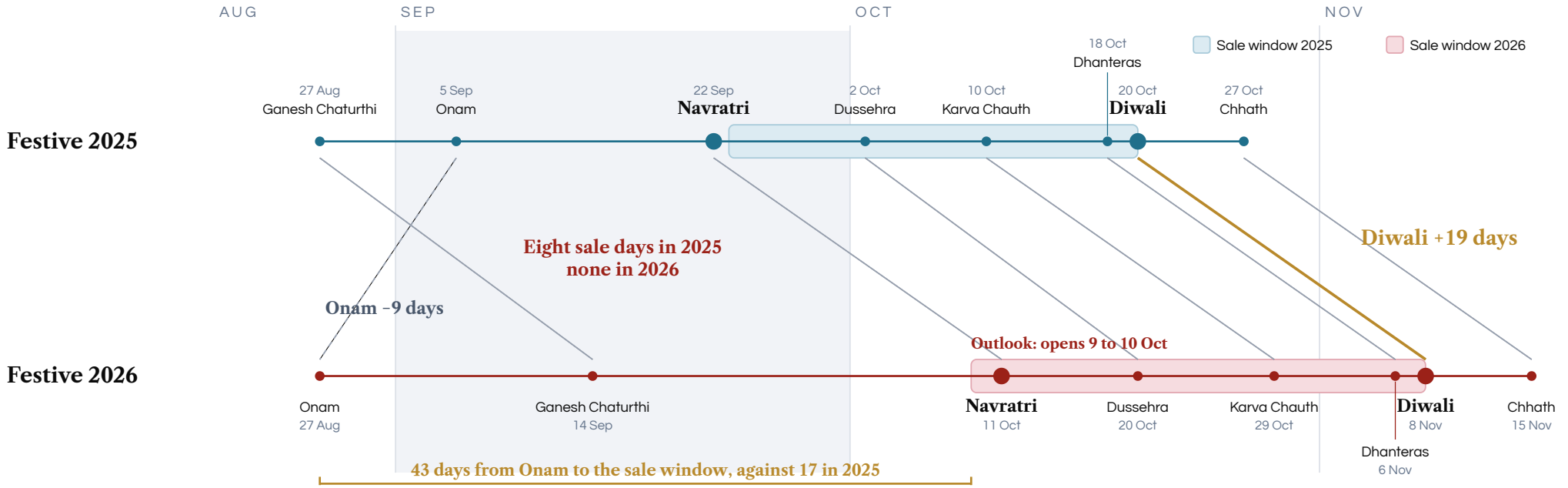
A late Diwali moved the whole season 19 days later

A leap month, the adhika masa, sat between the two seasons and pushed every lunar festival back, while Onam, on the solar calendar, came nine days earlier. **Onam to Chhath ran eighty days against fifty-two, and September carried no sale days at all, against eight in 2025.**

EXHIBIT 4

Festival and sale dates, 2025 against 2026

2025 dates moved forward a year to share one axis. The 2025 window ran 28 days; the Outlook put 2026 at 31



AS IT TURNED OUT

The sales opened two days earlier than the Outlook assumed. AJIO opened on 7 October, Amazon on 8 October and Flipkart on 9 October, so the season ran 33 days to Diwali, against 31 in the Outlook.

Sources: Datum 2026 Festive Outlook; Drik Panchang; PublicHolidays.in; Diwali.info; Smartprix

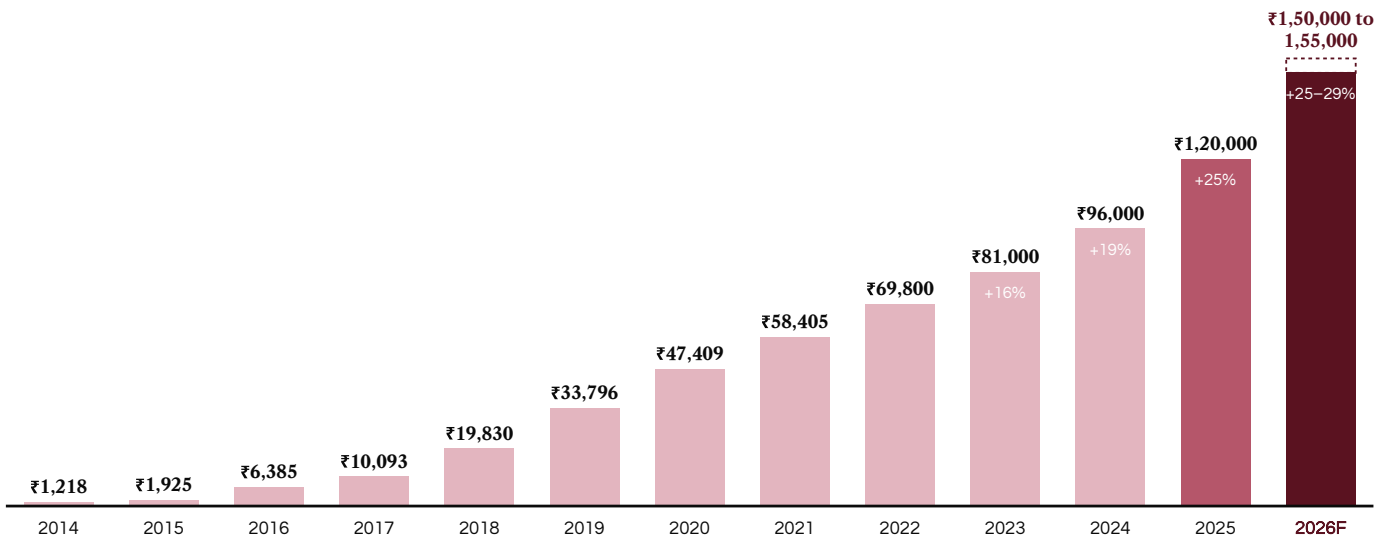
The Outlook expected ₹1.50 to 1.55 lakh crore, all of it from more orders

Datum's 2026 Festive Outlook, published in September, expected festive online sales of ₹1,50,000 to 1,55,000 crore ($17.0 to 17.6 billion), against ₹1,20,000 crore in 2025. **All of the growth was to come from more orders, and the opening week was to take 46 per cent of the season against 48.**

EXHIBIT 5

Festive season online GMV, 2014 to 2026

₹ crore, each year on its own festive window; 2026 is the Outlook forecast



WHAT THE OUTLOOK EXPECTED	2026
The season Lakh crore; 25 to 29 per cent on 2025's ₹1.20 lakh crore.	₹1.50–1.55
New sales in one season ₹ crore; about the size of the whole 2019 season.	₹30–35k
Where growth comes from Twenty million more shoppers, buying more often; basket 1.5% smaller.	Orders
First week Share of the season, against 48 per cent in 2025.	46%
Window Opens about 9 October; Diwali 8 November.	31 days

WHY THE SHARE SLIPS

The opening week loses weight. 2025 had member early access and GST 2.0 on day one; GST is now in the base. Quick commerce sells at the same rate every day, and Meesho, Myntra and Nykaa fill the weeks to Diwali with their own events.

Source: Datum 2026 Festive Outlook; 2014 was a single day

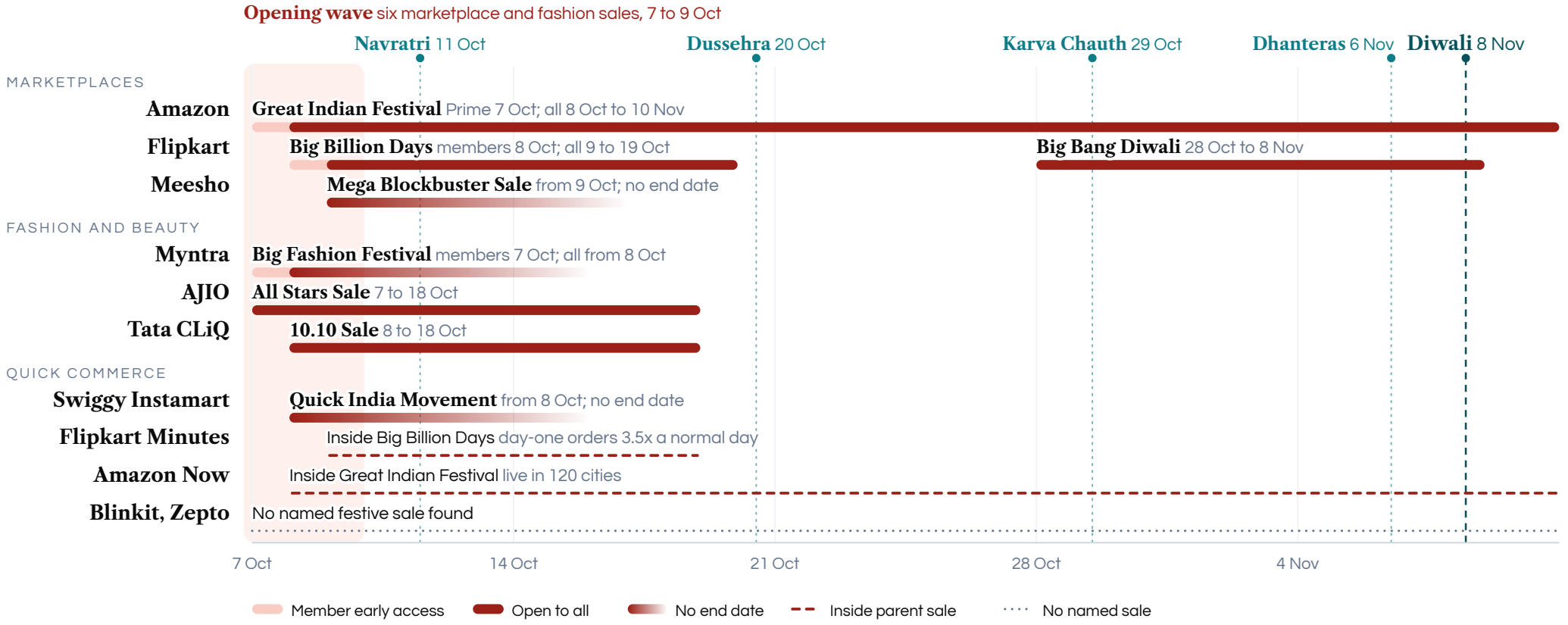
Six sales opened in three days; Amazon's ran on past Diwali

AJIO opened on 7 October, as Myntra's VIP access began and Amazon Prime members started shopping early. Amazon, Myntra and Tata CLiQ opened to all on 8 October, Flipkart and Meesho on 9 October. **We count sales from 7 October to Diwali on 8 November: 33 days, against 30 in 2025.**

EXHIBIT 6

Festive 2026 sale windows, 7 October to 10 November

Dates as announced by each platform, or by the trade press where no release was found



Sources: Platform announcements; Business Standard; PTI; trade press

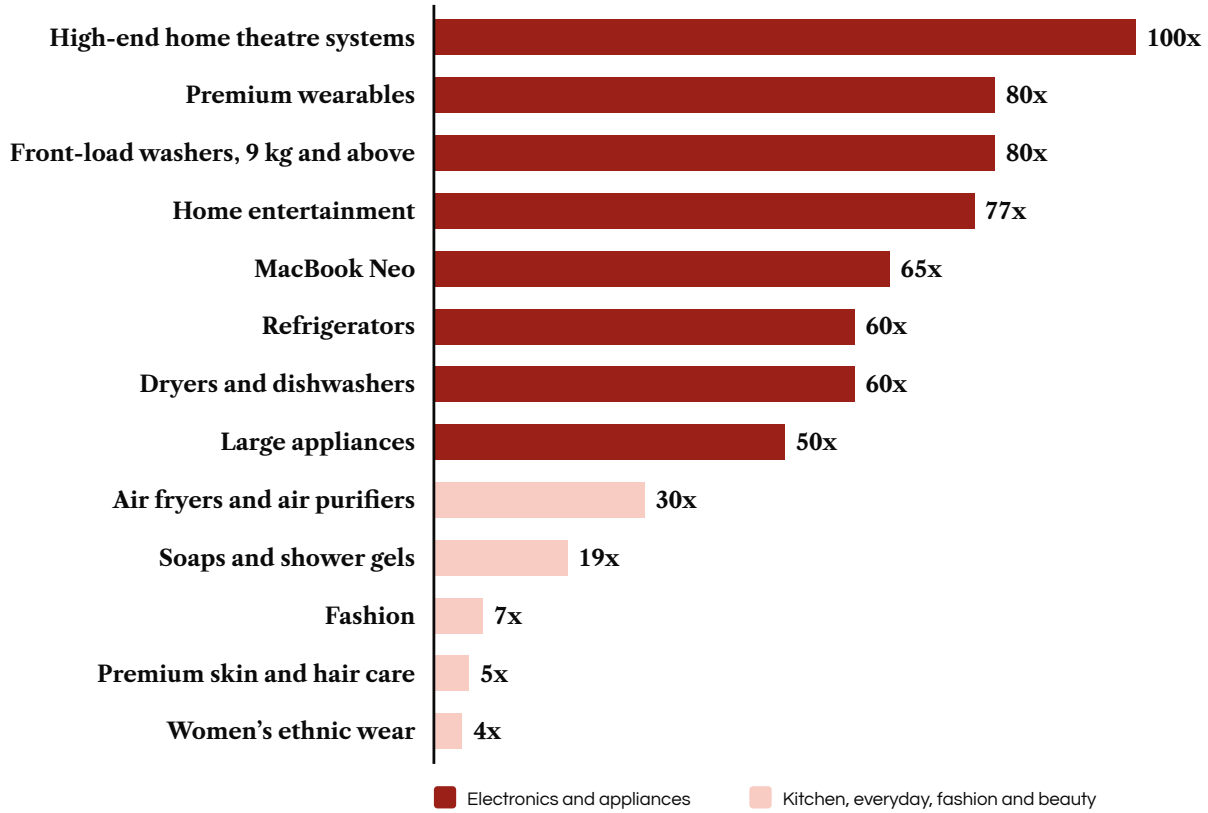
Amazon doubled units ordered in the first twelve hours of its sale

Amazon's first figures cover the 12 hours from midnight on 8 October; an update on the night of 9 October added visits and seller data. **Products ordered rose 100 per cent on last year, with the steepest gains in electronics and appliances.**

EXHIBIT 7

Amazon category sales against a regular day, first 12 hours

Multiple of a regular day, as reported by Amazon. Amazon does not define the regular day, so these figures do not compare across platforms



WHAT ELSE AMAZON REPORTED

01 Credit carried the basket

One in two shoppers used EMI in the first 12 hours, one in three over the longer window; one in three units earned a cashback.

02 Bigger screens, pricier phones, beauty

TVs of 55 inches and above were **65 per cent of TVs sold**; premium Android grew 70 per cent; beauty was one in four products, with premium skin and hair care selling 150 a minute.

03 440 million visits by 9 October

Amazon's highest ever, **72 per cent from beyond the top nine metros**; every pin code in India ordered within 12 hours. The visits window has no stated end.

04 New shoppers and sellers

First-time shoppers **nearly doubled**. Units from sellers more than doubled in 24 hours, and sellers above ₹1 crore rose 80 per cent.

Sources: Amazon India; Business Standard; PTI

Amazon's shopping volume was up 50 per cent by 3 November

Amazon updated twice after its opening: payments, delivery and brands on 12 October, then the festival to 3 November, a week before the sale closed on 10 November. **Most growth is against last year's festival; brand multiples are against each brand's own regular day.**

EXHIBIT 8

Amazon's figures to 3 November and what each is measured against

As published by Amazon on 12 October and 3 November 2026. Opening days: 12 October statement; the rest to 3 November

MEASURE	FIGURE	BASIS
Shopping volume	**+50%+**	on last year's festival; not defined by Amazon
Customer visits	**393 crore+**	absolute, festival to 3 November
Shopping basket size	**about +20%**	opening days, on last year
Customers using EMI	**over 1 in 3**	opening days, share of customers
EMI spending	**+40%**	on last year; 9 in 10 EMI rupees no-cost
Orders under ₹99	**5x**	on last year
Premium Android phones	**+50%**	above ₹30,000, on last year
Beauty, share of units	**1 in 6**	to 3 November
Same-day or faster deliveries	**about 5x**	products, on last year
Customer savings	**₹2,800 crore+**	deals, bank offers, cashback, free delivery

WHAT ELSE AMAZON REPORTED

01 Brands and two-wheelers

Solara ran at 35 times a regular day, Hero MotoCorp and Levi's 30. **Two-wheelers sold at six times a regular day** to 30 October, commuter bikes 13.5 times and electric 8; over 60 per cent went beyond the metros.

02 UPI and pay-later

One in four paid by UPI in the opening days, **two in five** by 3 November; Pay Later issuances rose 30 per cent.

AMAZON NOW, QUICK COMMERCE

03 Daily orders up 18 times

On last year; first-time shoppers **23 times**.

04 Half of products in minutes

One in two delivered in minutes across **120+ cities**, up from 60+ in mid-September; $1 billion annualised gross sales before the season.

Sources: Amazon India; Business Standard; Autocar Professional

Flipkart's opening hour drew 6.3 million shoppers at once

Flipkart's first statement, on 9 October, covers the opening hour and the member early access that began at midnight on 8 October. Myntra, in the same group, reported its first 24 hours on 9 October. **Nearly half of Flipkart's first-hour visits came from tier 3 towns and smaller.**

EXHIBIT 9

Flipkart's opening figures and what each is measured against

As published by Flipkart; it does not say whether "first hour" means 8 or 9 October

MEASURE	FIGURE	BASIS
Peak concurrent users, in a minute	**6.3 million**	absolute, first hour
Sessions in member early access	**287 million**	absolute, from midnight on 8 October
Shoppers in the first hour	**over 6x**	against a regular hour
New customers	**+34%**	growth; Flipkart does not state the base
Tablets	**+73%**	on last year, first hour
Beauty	**+42%**	on last year, first hour
Large appliances	**+30%**	on last year, first hour

ADDITIONAL DATA

~145 million

Flipkart daily app users on day 1 of Big Billion Days, a new high

Sensor Tower

48.1 → 43.7%

Flipkart's share of Flipkart, Amazon and Meesho search, opening to season

Google Trends

WHAT ELSE FLIPKART REPORTED

01 Demand came from small towns

Nearly one in two first-hour visits came from tier 3 and beyond; non-metros drove about 60 per cent of demand.

02 Phones, Minutes and sellers

One in four mobile buyers used exchange. Minutes orders ran **3.5 times a regular day** and new customers 11 times in the first hour; its business quadrupled in a year. 51 per cent of sellers doubled.

MYNTRA, BIG FASHION FESTIVAL

03 Demand at 4 times business as usual

First 24 hours, against an undefined base. **Over half of day 1 orders came from tier 2 and 3**; eastern markets ran 7 times.

04 Early access and speed

1.25 million shoppers bought VIP early access; M-Now orders doubled on day 1, base not stated.

Sources: Flipkart; Myntra; Business Standard; Sensor Tower; Google Trends

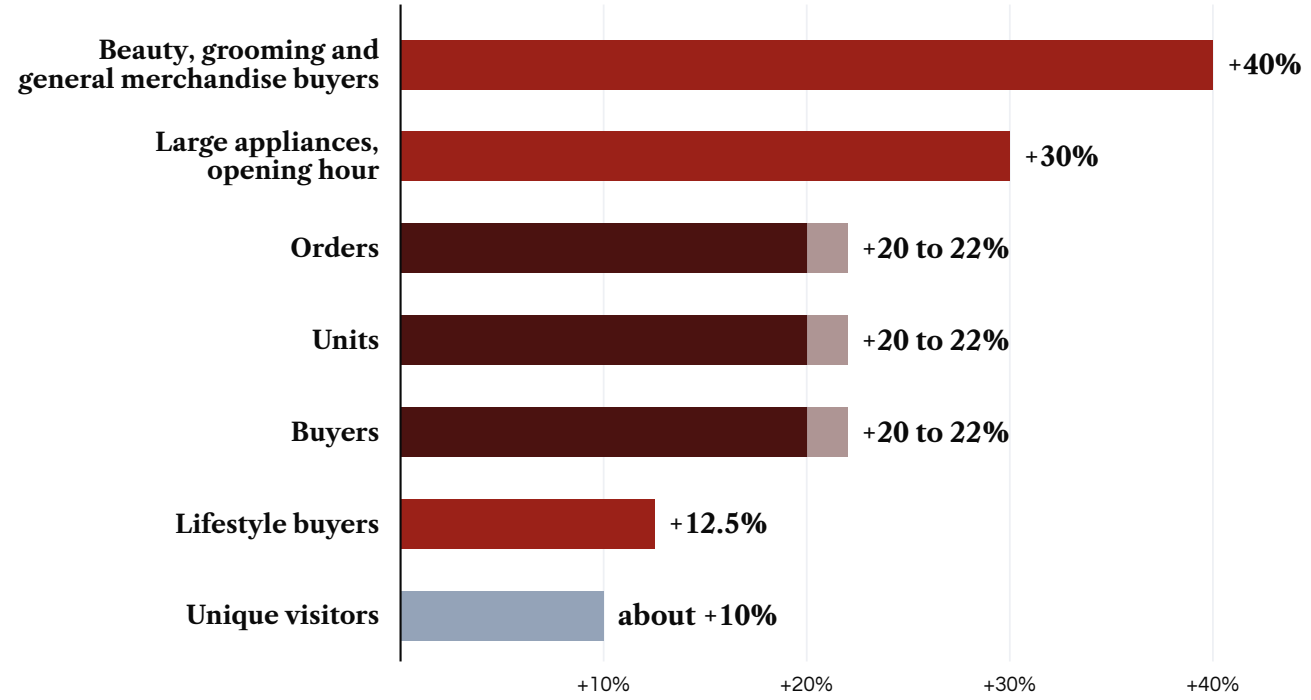
Flipkart's 11-day sale grew orders, units and buyers 20 to 22 per cent

Flipkart's close-of-sale statement covers The Big Billion Days, 9 to 19 October. **It gives orders, units, buyers and visitors against 2025; categories grew between 12.5 and 40 per cent in buyers.**

EXHIBIT 10

Flipkart's reported growth, Big Billion Days 2026 against 2025

Per cent change on 2025 as Flipkart published it; ranges as published. Large appliances is the opening hour only



Dark: orders, units and buyers, the headline counts. Grey: visitors. All against 2025 except where marked

REACH AND WHO BOUGHT

01 Nine in ten online shoppers visited

One in 15 came in the first hour on 9 October. **Nearly half of buyers were Gen Z; about 60 per cent were from tier 2 and smaller towns.**

02 Big tickets and Minutes

Big-ticket demand ran **nearly 9 times a normal period** through the sale; new Flipkart Minutes customers 1.7 times regular days.

SELLERS

03 31 per cent doubled their business

Against business as usual. **Tier 2 and smaller sellers grew 2.15 times**; Bhiwadi 2.6, Panipat 2.5, Tirupur 2.1, Hisar 2 times.

Sources: Flipkart; Business Standard

Myntra's new non-metro shoppers beat a regular day by 74 per cent

Myntra's statement on the Big Fashion Festival, published on 26 October, follows its opening-day update. **Most figures are against a regular business day, a few against the last festival; it gives no end date.**

EXHIBIT 11

Myntra's festival figures and what each is measured against

As published by Myntra and carried by Indian Retailer, 26 October 2026

MEASURE	FIGURE	BASIS
D2C, international and FWD orders	nearly 2x	regular business day
Sports footwear orders	3.5x	regular business day
New customers, non-metro	+74%	regular business day
M-Now orders	2.6x	previous Big Fashion Festival
Visits to emerging brands	+25%	previous edition
New beauty customers	about +20%	basis not stated
Sellers who doubled sales	1 in 4	during the festival; 1,350+ grew fivefold

ADDITIONAL DATA

~30 million
Myntra's peak daily app users in the sale, against about 26 million in 2025
Sensor Tower

+40%
Myntra daily users, first six sale days, against September
Sensor Tower

7%
Myntra's share of search in the opening days, against Flipkart's 45
Google Trends

WHAT ELSE MYNTRA REPORTED

01 Growth came from the east
Guwahati, Dehradun, Bhubaneswar, Jammu and Gorakhpur grew fastest; West Bengal, Assam and Odisha ran **above the last edition**.

02 Who came first
Men's casual wear accounted for **26 per cent** of first-time buyers.

03 Sellers and speed
Myntra has added **12,000 sellers** in 2026; the fastest M-Now delivery took under five minutes.

Sources: Myntra; Indian Retailer; Sensor Tower; Google Trends

Meesho's day-one orders rose 75 per cent on last year

Meesho's first statement, on 10 October, covers day 1 of its Mega Blockbuster Sale, which opened to all on 9 October. **It reports orders, customers and sellers against last year.**

EXHIBIT 12

Meesho's day-one figures and what each is measured against

As published by Meesho and carried by Newskarnataka. All growth is against the corresponding period last year

MEASURE	FIGURE	BASIS
Orders	**+75%**	on last year, day 1 (9 October)
Customers placing orders	**+60%**	on last year, day 1
Peak order rate	**75,000+ a minute**	absolute, first 15 minutes
Meesho Mall orders	**more than +200%**	on last year, day 1
Content commerce orders	**about 3.7x**	on last year, day 1
Transacting sellers	**+63%**	on last year, day 1
Sellers with a first-ever order	**about +43%**	on last year, day 1

ADDITIONAL DATA

315 million

Meesho monthly app users in September, ahead of Flipkart's 305 million

Sensor Tower

15.9%

Meesho's share of search, 16 October to 5 November, its best stretch

Google Trends

WHAT ELSE MEESHO REPORTED

01 Mall reached small towns

Mall customers from tier 3 and smaller towns **nearly tripled**; one in three Mall shoppers bought for the first time, across 1,000-plus brands.

02 Recommendations did the selling

Nearly 85 per cent of day 1 orders came through personalised recommendations.

03 Creators from outside the metros

About 90 per cent of active creators were nano creators, and **81 per cent came from non-metro India**.

04 Festive niches

Torans and wall hangings orders grew **eight times**, earring support patches nearly seven and rosemary hair care more than six.

Sources: Meesho; Newskarnataka; Sensor Tower; Google Trends

Zepto delivered 14,000 gold and silver coins in its busiest Dhanteras hour

Zepto, Instamart and Flipkart Minutes published Diwali-week figures on 8 and 9 November. **Almost all are festive categories against each platform's own base; only Flipkart Minutes gave a figure for all orders, and Blinkit published none that we found.**

EXHIBIT 13

Quick-commerce figures for Dhanteras and Diwali week

Each against the platform's own base, as stated; "base not stated" where the release gives none

MEASURE	FIGURE	BASIS
Zepto, coins	**14,000+**	gold and silver coins, busiest Dhanteras hour
Zepto, diyas	**4,68,000**	orders, week before Diwali
Zepto, brooms	**38.6x**	a normal day, Dhanteras
Instamart, gold coins	**23x**	week before Dhanteras; base not stated
Instamart, party orders	**+162%**	on last year, week before Diwali
Flipkart Minutes, all orders	**3x**	30 October to 5 November; base not stated
Flipkart Minutes, envelopes	**4x**	6 to 8 November, on last year's Diwali days

ADDITIONAL DATA

+45%
Quick-commerce search, Dhanteras to Diwali, against the opening five days
Google Trends

~58 million
Blinkit monthly app users, up 53 per cent in a year
Sensor Tower

WHAT ELSE THEY REPORTED

01 Rituals moved to ten minutes
On Zepto, steel utensils sold **20 times** a normal day and decorative lights 18.2 times; Instamart silver coins rose 7 times.

02 Fashion and gifts
Zepto festive fashion orders **doubled** and hampers tripled; Instamart clothing rose 50 per cent and footwear 79.

03 Flipkart Minutes
Diya sales rose **12 times** and gold coins and bars more than doubled, 30 October to 5 November.

Sources: Zepto; Instamart; Flipkart Minutes; Business Standard; Sensor Tower; Google Trends

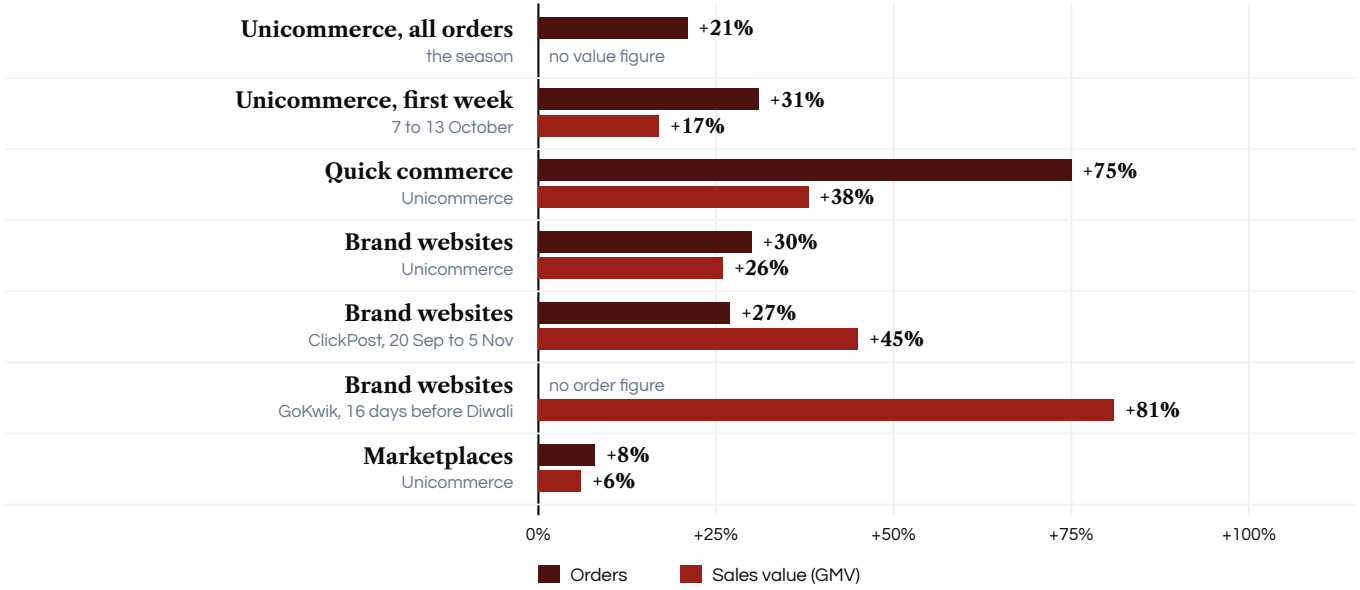
Brand websites and quick commerce grew; marketplaces barely moved

Unicommerce, GoKwik and ClickPost run order handling, checkout or shipping for brands and sellers, and each compared this festive season with last year's. **Across them, quick commerce orders rose 75 per cent and brand websites 27 to 30; marketplace orders rose 8.**

EXHIBIT 14

Growth on the 2025 festive season, by platform and channel

Per cent on last year; each platform's own clients and dates. Unicommerce: 6 October to 4 November against 17 September to 16 October 2025



THE SEASON	2026
Orders under ₹1,000 Share of Unicommerce orders	85%
Tier 3 towns Share of orders; tier 2 took 24%	41%
Prepaid Share of orders	61%
GoKwik brands Sales in the 16 days before Diwali	₹1,328 cr

ORDER GROWTH BY TOWN	ON 2025
Tier 3 41% of orders	+26%
Tier 2 24% of orders	+23%
Metro and tier 1 34% of orders	+13%

DELIVERY, BRAND WEBSITES, 2026			
~2.5 days Average delivery time, from more than 3 in 2025 ClickPost	**10%** Orders returned undelivered, from 11% ClickPost	**83% vs 78%** On-time delivery, tier 2 and 3 towns against metros ClickPost	**2.6 → 5%** Hyperlocal share of brand-site orders ClickPost

Sources: Unicommerce; GoKwik; ClickPost

Pricier phones cost 5 points of growth; the rest grew 35 per cent

Phones were 35 per cent of festive online sales in 2025. Units fell a quarter to a third while prices rose 16 to 19 per cent, so phone sales value fell about 10 to 20 per cent. **Without that, the season would have grown about 22 per cent, not 17.**

EXHIBIT 15A

From 2025 to 2026 festive online sales

₹ lakh crore; phones at their mid case, a 15 per cent fall in value

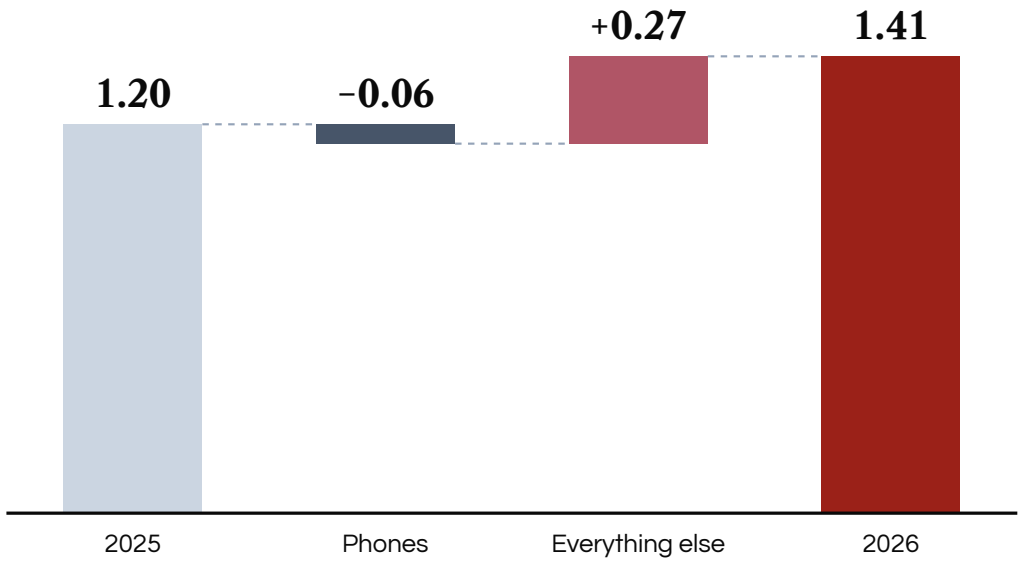
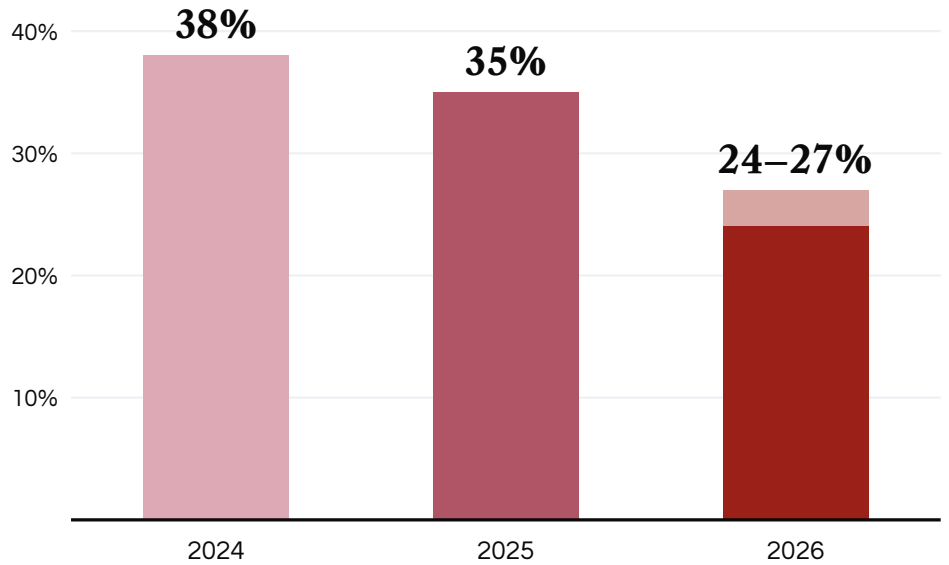


EXHIBIT 15B

Mobiles' share of festive online sales

Per cent; 2026 Datum estimate, shaded: range



WHAT MOVED — FESTIVE 2026, DATUM ESTIMATES

Phone units online Opening days.	**Average phone price** As memory costs fed through.	**Sales outside phones** 2025 to 2026.
−25 to −33%	+16 to 19%	+35%

Sources: Datum festive model; Counterpoint Research; Omdia

Appliance makers held prices, and shoppers compared harder

Makers delayed price increases until after the season, so the hit from inflation was smaller than in phones, and buyers traded up. **Deals leaned on bank offers, cashbacks and EMI rather than deeper price cuts; searches for price trackers rose 130 to 170 per cent.**

EXHIBIT 16A

Amazon sales against a regular day, first 12 hours

Multiple of a regular day, as reported by Amazon

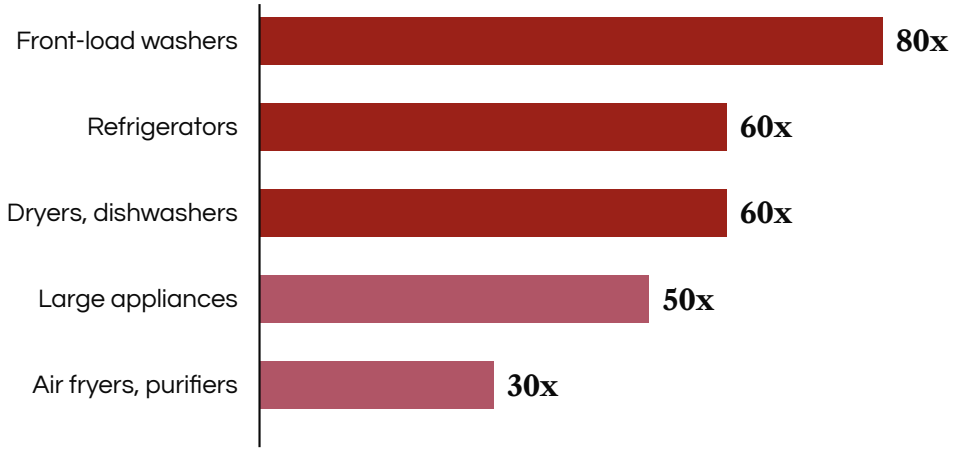
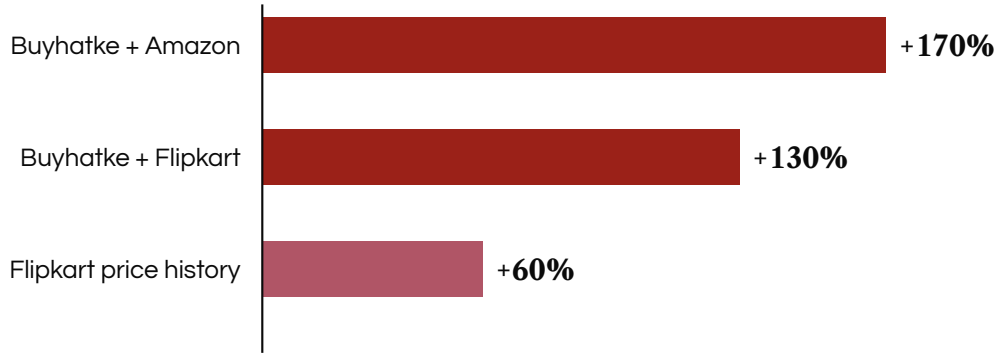


EXHIBIT 16B

Price-comparison searches, festive 2026 against 2025

Per cent change, Google search interest, India



HOW THE DEALS WORKED — FESTIVE 2026

Amazon units with a cashback At the opening.	**1 in 3**	**Amazon shoppers on EMI** First 12 hours.	**1 in 2**	**TVs of 55 inches and above** Share of Amazon TV sales.	**65%**

Sources: Amazon India; Flipkart; Google Trends

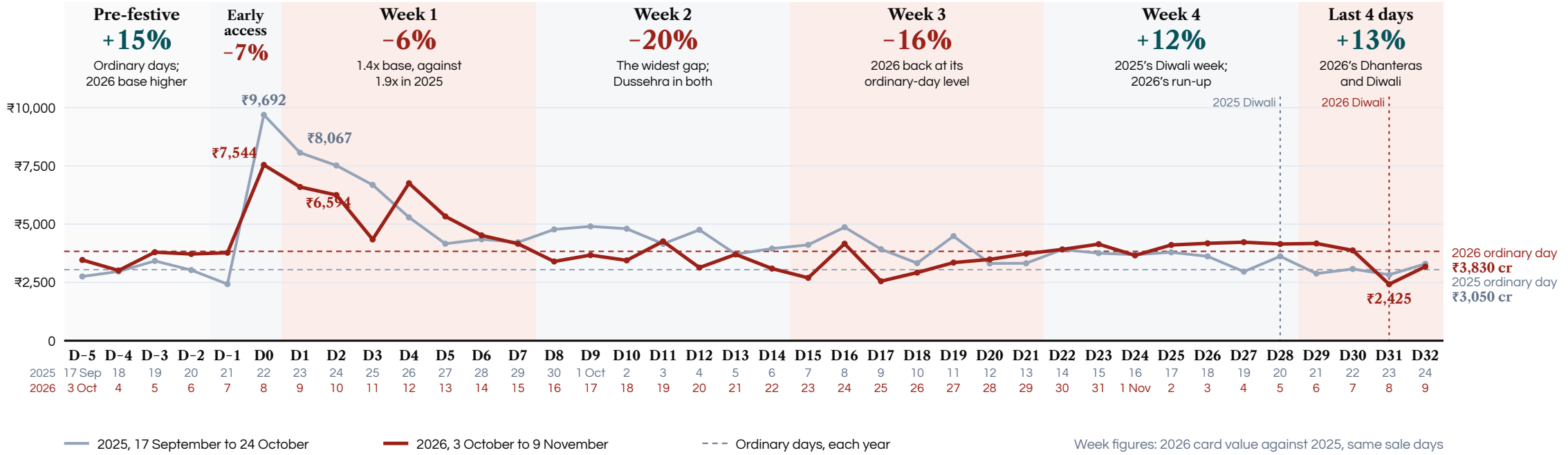
Ordinary days are up 26 per cent, but sale-day card value trails 2025

Before the sales, card payments at e-commerce averaged ₹3,830 crore a day, 26 per cent above 2025's ₹3,050 crore. **Over the 32 sale days they came in 6 per cent below 2025: weeks 2 and 3 trailed by 16 to 20 per cent, and the Diwali run-up ran 12 to 13 per cent ahead.**

EXHIBIT 17

Card value by sale day

₹ crore a day. Credit, debit and prepaid cards at e-commerce, as spent: weekend and holiday spending moved back to its own day. D1 is the first day both Amazon and Flipkart were open to all: Tuesday 23 September 2025, Friday 9 October 2026



WHAT IT MEANS

The sale now adds a smaller premium to a bigger everyday market. Week 1 lifted card spending to 1.4 times its ordinary-day level, against 1.9 times in 2025, and by week 3 it was back at the base. The last 11 days brought in more than week 1.

Source: RBI daily payments data, to 9 November 2026

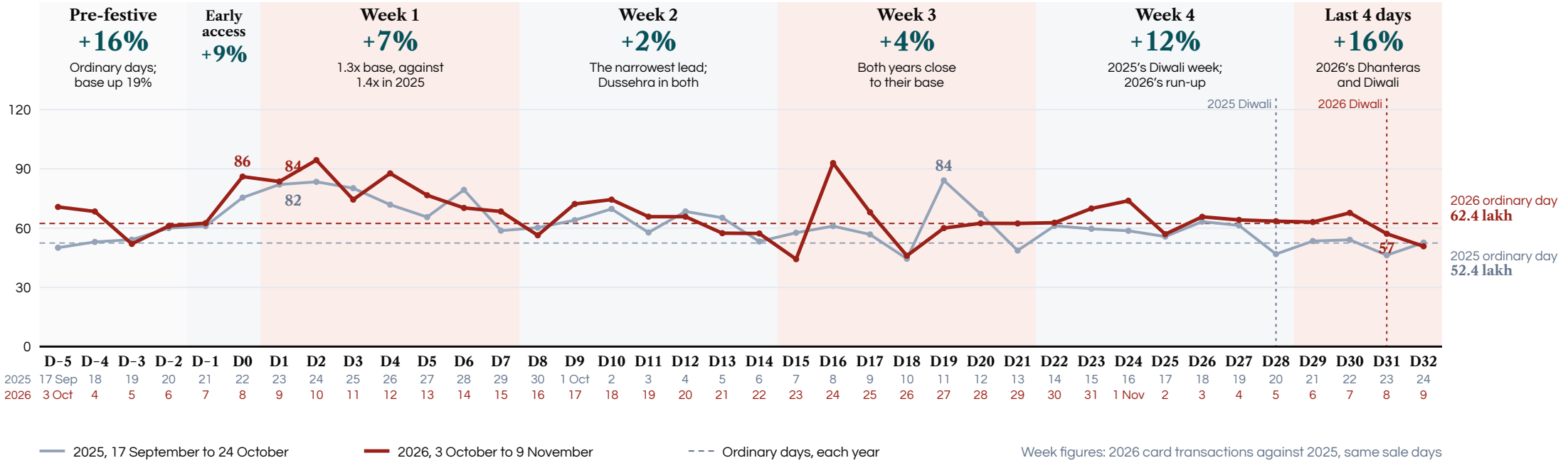
Card transactions beat 2025 in every sale week, by 2 to 16 per cent

Before the sales, card payments at e-commerce ran at 62.4 lakh a day, 19 per cent above 2025's 52.4 lakh. **Over the 32 sale days transactions rose 7 per cent, but the sale lifted them less: 1.3 times the ordinary day in week 1, against 1.4 times.**

EXHIBIT 18

Card transactions by sale day

Lakh transactions a day. Credit, debit and prepaid cards at e-commerce, as spent: weekend and holiday payments moved back to their own day. D1 is the first day both Amazon and Flipkart were open to all: Tuesday 23 September 2025, Friday 9 October 2026



WHAT IT MEANS

Orders held up; each order was worth less. With transactions up 7 per cent and value down 6, the whole gap on cards sits in ticket size.

Source: RBI daily payments data, to 9 November 2026

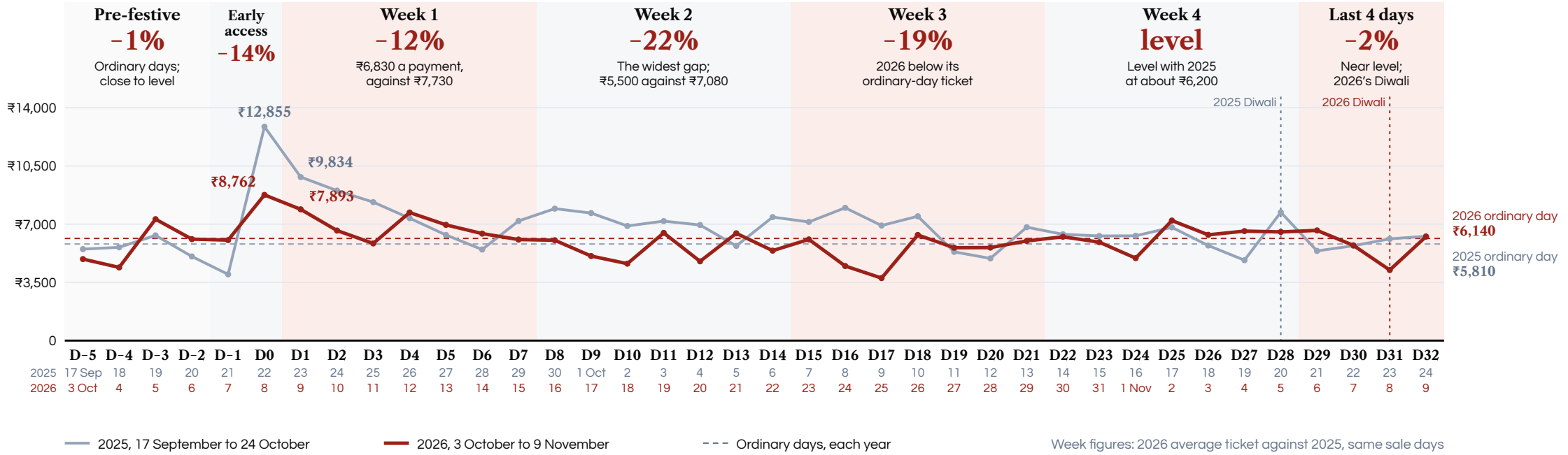
The average card payment was 13 per cent smaller across the season

On ordinary days the average card payment was ₹6,140, 6 per cent above 2025's ₹5,810. **Across the 32 sale days it averaged about ₹5,970 against ₹6,830; the gap was widest in weeks 2 and 3, and on D1 2025 had the GST rate cut behind it.**

EXHIBIT 19

Average ticket by sale day

₹ a transaction: card value over card transactions, each day. Credit, debit and prepaid cards at e-commerce, as spent: weekend and holiday payments moved back to their own day. D1 is the first day both Amazon and Flipkart were open to all: Tuesday 23 September 2025, Friday 9 October 2026



WHAT IT MEANS

Smaller payments explain the whole value gap. At last year's ticket, the 7 per cent rise in transactions would have put card value 7 per cent ahead of 2025 rather than 6 per cent behind. Ticket size decided the season on cards.

Source: RBI daily payments data, to 9 November 2026

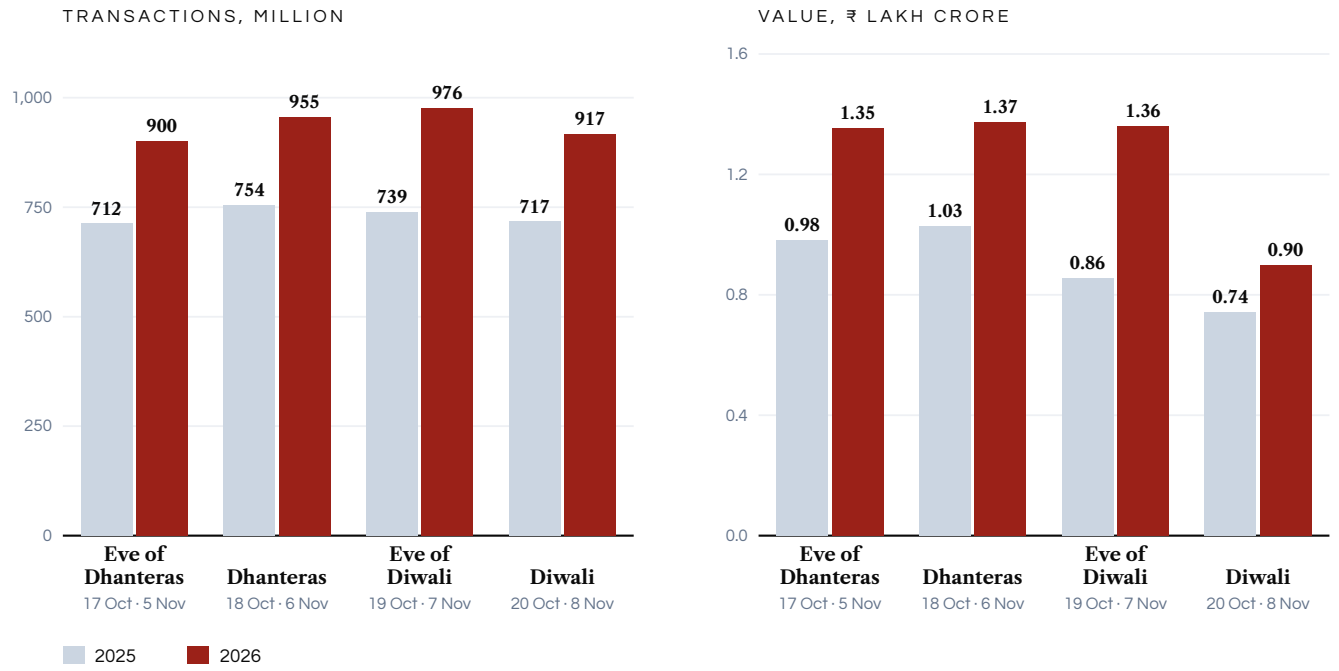
UPI carried 38 per cent more value over Diwali than last year

All UPI payments on the four days from the eve of Dhanteras to Diwali, 5 to 8 November 2026, against the same festival days of 2025, 17 to 20 October. **Transactions rose 28 per cent, to 3,748 million, and value 38 per cent, to ₹4.99 lakh crore; the average payment rose 8 per cent.**

EXHIBIT 20

UPI transactions and value, Diwali's four days, 2025 and 2026

Days matched by festival, not date; all UPI payments, person-to-person and merchant



FOUR DAYS	2025 · 2026
Transactions 2,923 million in 2025; 3,748 million in 2026	+28%
Value ₹3.61 lakh crore in 2025; ₹4.99 lakh crore in 2026	+38%
Average payment ₹1,235 in 2025; ₹1,331 in 2026, Datum calculation	+8%
Diwali day, value ₹74,285 crore in 2025; ₹90,029 crore in 2026	+21%

READ WITH CARE

All UPI, not online sales. These figures cover every UPI payment, including transfers between people and payments in shops, so they show festive spending in general, not e-commerce. Diwali fell on a Sunday this year and a Monday last year, and value peaked on Dhanteras in both.

Source: UPI daily transaction data

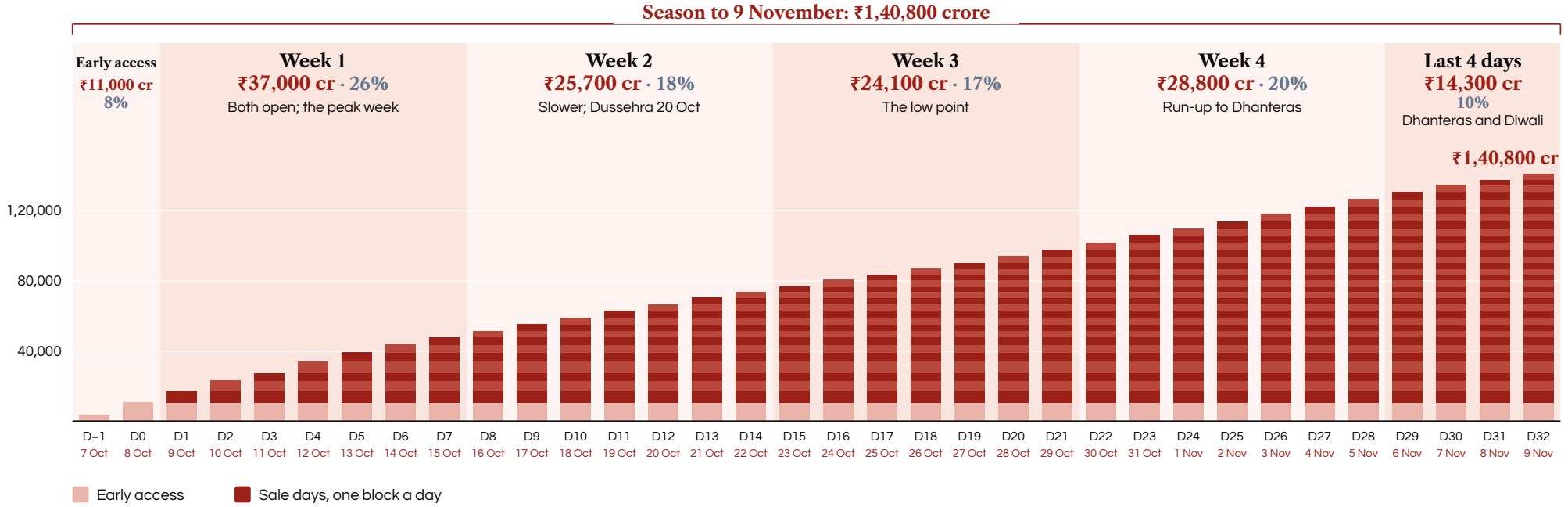
2026 passed 2025's whole season on D27 and reached ₹1.41 lakh crore

Counted from 7 October and including quick commerce, sales reached ₹1,37,500 crore by Diwali and ₹1,40,800 crore with Monday 9 November. **Early access and week 1 took 34 per cent of the season; the run-up to Dhanteras did the rest of the catching up.**

EXHIBIT 21

Cumulative festive online sales by sale day, 2026, week by week

₹ crore, cumulative from D–1 (7 October 2026); one block a day. Days and week totals include quick commerce; shares are of the season to 9 November. D1: 9 October, the first day both sales were open to all



WHERE THE SEASON ENDED — 7 OCT TO 9 NOV, ₹ CRORE

To Diwali, 8 Nov 33 sale days.	**₹1,37,500**	**With 9 November** 34 sale days.	**₹1,40,800**
Of the Outlook ₹1.50 to 1.55 lakh crore.	**91–94%**	**A sale day** ₹4,000 crore in 2025.	**₹4,140**

Sources: RBI daily payments data; Datum festive model

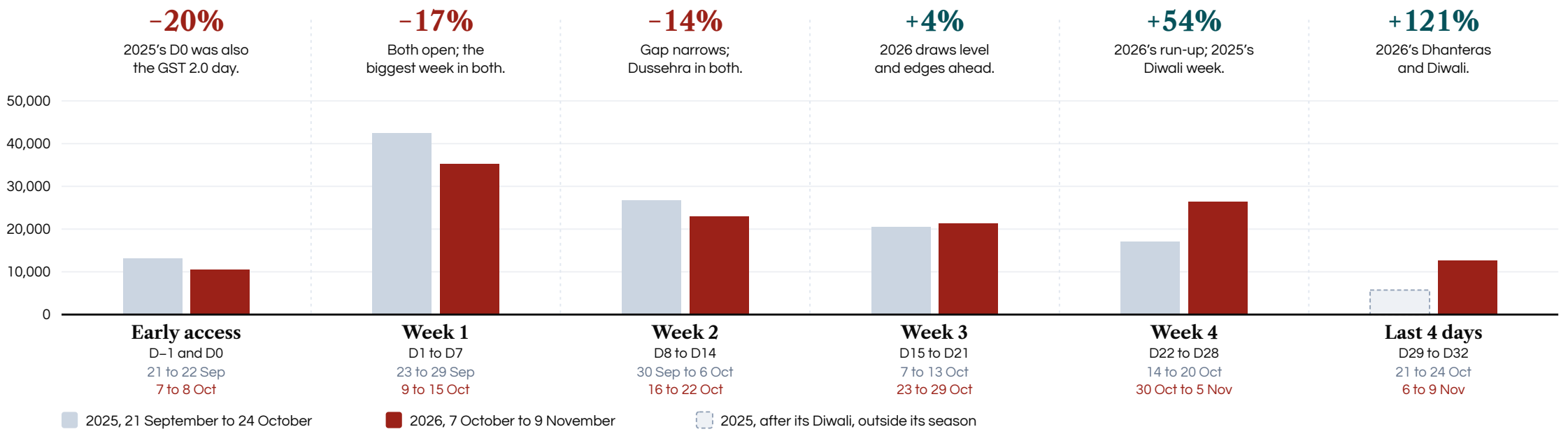
Festive sales trailed 2025 until week 3, then pulled ahead into Diwali

By sale week, 2026 festive sales ran 11 per cent below 2025 over weeks 1 to 3 and 71 per cent above from week 4, as 2026's Diwali fell three sale days later. **To Diwali, sales came to ₹1,26,200 crore, 5 per cent above 2025, over 33 sale days against 30.**

EXHIBIT 22

Festive online sales by sale week, 2025 and 2026

₹ crore a week; card-based sales estimate, before the quick-commerce top-up, so like for like with 2025. Weeks start at D1, the first day both sales were open: 23 September 2025 and 9 October 2026. Change: 2026 on 2025



FESTIVE SALES, CARD-BASED		2025 → 2026, ₹ CRORE			
Weeks 1 to 3	**−11%**	**Week 4 and the last 4 days**	**+71%**	**Season to Diwali**	**+5%**
₹89,715 crore in 2025; ₹79,560 crore in 2026.		₹22,879 crore in 2025; ₹39,079 crore in 2026.		₹1,20,000 crore in 30 days; ₹1,26,210 crore in 33.	

Sources: RBI daily payments data; Datum festive model

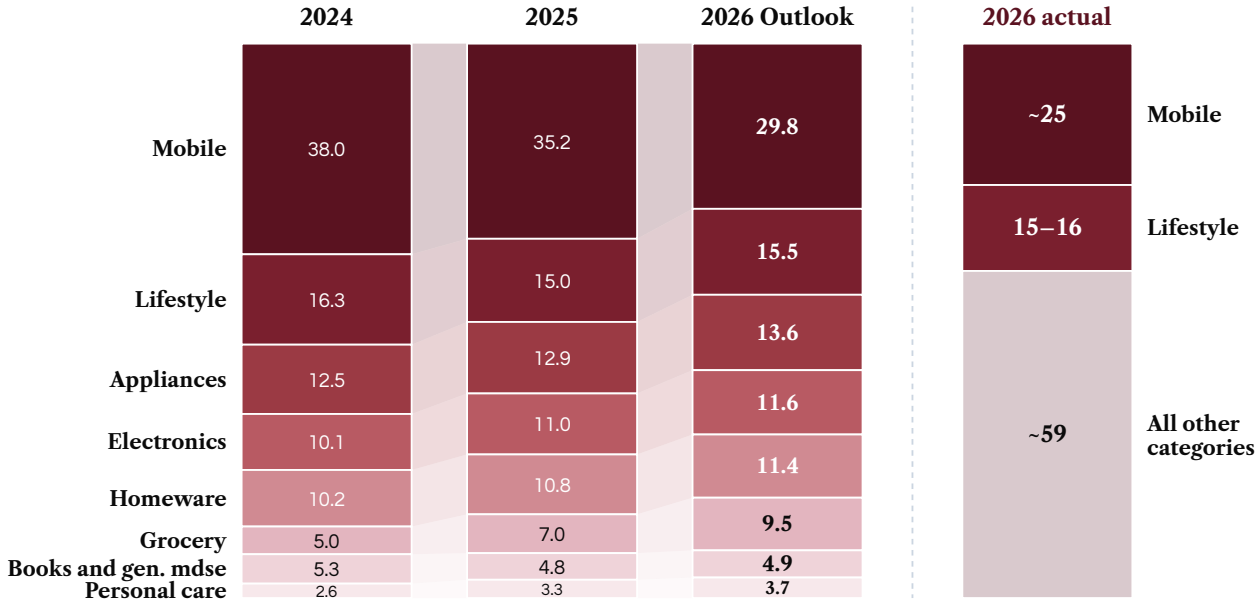
Phones fell to about a quarter of sales, further than forecast

The Outlook had mobile falling from 35.2 per cent of the season to 29.8. **Phone sales value fell about 15 per cent instead, taking mobile to about 25 per cent; lifestyle held at 15 to 16 per cent and quick commerce reached 16, as forecast.**

EXHIBIT 23

Category share of festive GMV, 2024 to 2026

Per cent of festive online GMV. 2026 actual is Datum's estimate to 9 November; categories other than mobile and lifestyle are not yet split



OUTLOOK AGAINST ACTUAL	2026
Mobile share Outlook 29.8 per cent; units fell a quarter to a third.	~25%
Mobile sales value Outlook +6 per cent; prices rose 16 to 19 per cent.	about −15%
Lifestyle share Outlook 15.5 per cent; held steady.	15–16%
Quick commerce share Outlook 16 per cent; up from 12 in 2025.	~16%
Top two categories Mobile and lifestyle; Outlook 45.3 per cent.	~41%

AGAINST THE OUTLOOK

Phones moved further than forecast. The Outlook had mobile at 29.8 per cent; it ended near 25 as units fell a quarter to a third. Lifestyle held, so the other categories took the share phones lost; their split is not yet available.

Sources: Datum 2026 Festive Outlook; Datum festive model; Counterpoint Research; Omdia

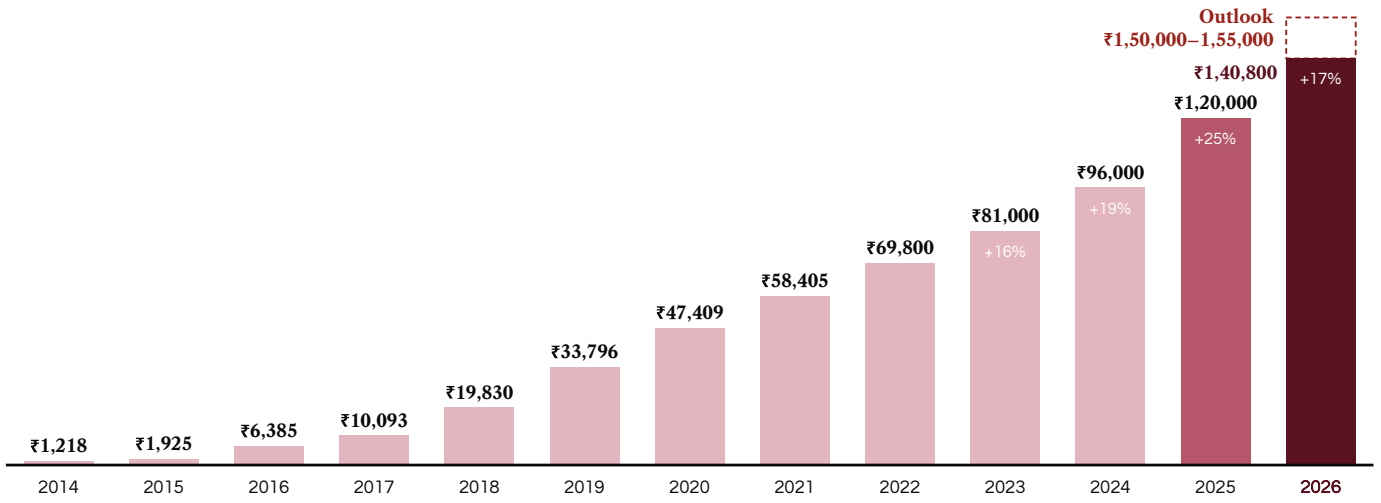
The season came in at ₹1.41 lakh crore, up 17 per cent

Datum's daily model puts festive online sales at about ₹1,40,800 crore over 34 sale days to 9 November, against ₹1,20,000 crore in 30 days in 2025. **That is ₹9,200 to 14,200 crore below the Outlook's ₹1,50,000 to 1,55,000 crore, and the slowest growth since 2023.**

EXHIBIT 24

Festive season online GMV, 2014 to 2026

₹ crore, each year on its own festive window; 2026 is Datum's daily model to 9 November. Dashed box: the Outlook



WHAT 2026 DELIVERED	TO 9 NOV
The season Lakh crore; 17 per cent on 2025's ₹1.20 lakh crore.	₹1.41
Against the Outlook ₹ crore short of ₹1.50 to 1.55 lakh crore, 6 to 9 per cent.	–₹9–14k
New sales in one season ₹ crore; a little more than the whole 2018 season.	₹20.8k
Where growth came from Card transactions up 7 per cent; the average payment 13 per cent smaller.	Orders
Window 7 October to 9 November, early access included; Diwali 8 November.	34 days

AGAINST THE OUTLOOK

Baskets shrank far more than the Outlook assumed. It expected the basket to fall 1.5 per cent; the average card payment fell 13 per cent while card transactions rose 7. Three more sale days and quick commerce made up part of the gap.

Sources: Datum festive model; Datum 2026 Festive Outlook; 2014 was a single day

Plan 2027 around reach and the Diwali run-up, not the opening day

Festive online sales reached about ₹1.41 lakh crore, up 17 per cent on 2025 but short of the Outlook. **The gains came from more buyers and later weeks; the opening peak and the big-ticket basket both lost weight.**

WHAT THE SEASON SHOWED

The marketplaces opened bigger, on more orders

Flipkart grew orders, units and buyers **20 to 22 per cent**; Amazon doubled units in its first 12 hours; Meesho's day-one orders rose 75 per cent.

The opening carried a third of the season

Early access added ₹11,000 crore and week 1 ₹37,000 crore, **34 per cent together**; weeks 2 and 3 slowed to ₹25,700 and ₹24,100 crore before the run-up to Dhanteras.

More payments, smaller ones

Online card transactions rose **7 per cent** over the 32 sale days while value fell 6, so the average payment fell 13 per cent. Credit and EMI carried the big tickets; UPI and cash on delivery the small orders.

Phones cost 5 points of growth; the rest grew 35 per cent

Phone sales value fell about 15 per cent, taking mobiles to **about a quarter of sales**, from 35 per cent in 2025.

Quick commerce took a sixth, on a bigger network

About **16 per cent of sales**, up from 12, on orders of ₹520 to ₹660; India had 7,153 dark stores, up 34 per cent.

Deals came through credit, not price cuts

Bank offers, cashbacks and EMI did more than discounts; appliance makers held prices, and searches for price trackers rose **130 to 170 per cent**.

IMPLICATIONS

01 FOR BRANDS

Spend across the season, not on day one. The last 11 days brought in more card value than week 1 and ran 12 to 13 per cent ahead of 2025. The run-up to Dhanteras needs a budget of its own.

02 FOR PHONE MAKERS

Price rises cost volume. Prices rose 16 to 19 per cent, units fell a quarter to a third, and phones dropped from 35 to about 25 per cent of sales. One in four Flipkart mobile buyers traded in an old phone.

03 FOR PLANNERS

Judge the season on the daily rate. Diwali on 8 November gave 2026 three more days. The daily rate, ₹4,140 crore, was close to 2025's ₹4,000; matching the Outlook over the same 34 days needed ₹4,410 to 4,560.

04 FOR QUICK COMMERCE

Quick commerce is now a festive channel. About 16 per cent of the season, up from 12, on orders of ₹520 to ₹660. Amazon Now's daily orders rose 18 times on last year.

THE FINDING THAT MATTERS

The festival reached further and spent less per order. 72 per cent of Amazon's visits came from beyond the top nine metros, and about 60 per cent of Flipkart's buyers from tier 2 and smaller towns. The next round of growth depends on adding shoppers and orders.

Sources: Datum festive model; RBI; company releases; Google Trends; Datum 2026 Festive Outlook

Definitions

TERMS

Festive window
From the opening of Big Billion Days and the Great Indian Festival to Diwali. In 2025 it ran 23 September to 20 October, twenty-eight days. In 2026 it ran 9 October to Diwali on 8 November, thirty-one days. This tracker counts from 7 October, early access included, to 9 November, against 21 September to Diwali in 2025.

GMV
Gross merchandise value, before returns and before cancellations. Where a figure is net order value, the exhibit says so. Dollar figures are converted at ₹88, the rate the festive model uses.

Online retail
Purchases of goods completed online, including on mobile devices and web-enabled kiosks, with delivery at home or in store. Excludes travel, cars, prescription medicine, restaurant sales and fuel.

Quick commerce
Delivery inside one hour from a dark store or micro-fulfilment centre. Every quick commerce rupee in this report already sits inside the online retail total.

CATEGORIES

Mobile
Smartphones and feature phones.

Consumer electronics
Laptops and tablets, computer accessories, storage, power banks, headphones, speakers, smart watches and bands, cameras, game consoles, personal healthcare devices.

Personal care and cosmetics
Toiletries, oral care, bath and shower, deodorants, baby and childcare other than food, haircare, fragrance, colour cosmetics.

Lifestyle
Clothing for adults and children, footwear, luggage, jewellery including artificial, watches, bags and accessories.

Homeware and furniture
Furniture, mattresses, textiles and furnishings, home decor, glassware, non-electric cookware, cutlery, home improvement, garden.

Appliances
Refrigerators, air conditioners, washing machines, televisions, microwaves, water purifiers, vacuum cleaners, fans and coolers, geysers, small kitchen appliances.

Grocery, including quick commerce
Fruit and vegetables, staples, oil, spices, bakery, dairy, beverages, condiments, baby food, snacks, confectionery, poultry, dried fruit and nuts.

Books and general merchandise
Sporting goods and fitness, books and magazines, auto accessories, office products, flowers, non-prescription medicine, supplements, traditional toys, pet supplies.

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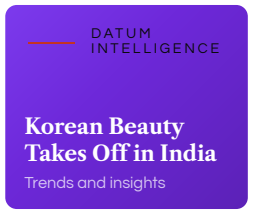
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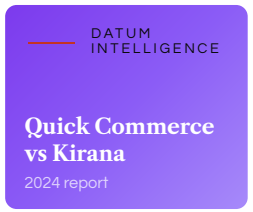
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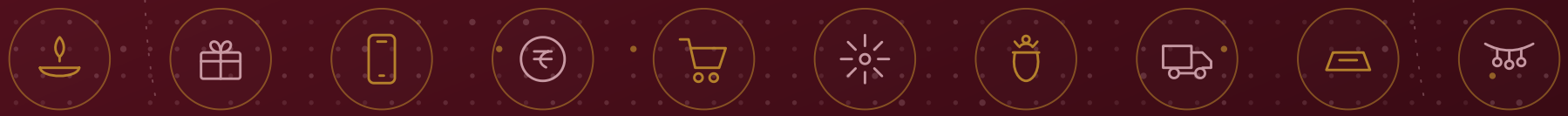
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