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La Creme De La Creme Services LLP

Daily Newsletter

August 11, 2026

Broad Indices	Aug 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	78542	0.06	1.57	-1.65	20.81
Nifty 50	24584	0.05	1.69	0.91	20.88
BSE Mid cap	49311	0.17	3.78	10.63	NA
Nifty Midcap 100	63856	0.62	7.29	14.02	31.18

Sectoral Indices	Aug 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	65045	-0.04	8.47	23.96
BSE Bankex	65307	-0.28	4.74	6.84
BSE CD	65758	1.21	8.59	11.40
BSE CG	79653	0.47	-0.59	19.33
BSE FMCG	18484	0.05	-2.70	-8.50
BSE Healthcare	51189	-0.09	10.00	18.60
BSE IT	30370	0.22	6.25	-10.19
BSE Metal	42196	0.10	-1.28	38.53
BSE Oil & Gas	26401	0.20	-3.69	1.43
BSE Power	7677	0.21	-7.34	16.79
BSE Realty	7022	1.60	9.54	3.39

Nifty			
Top Out performers	% Change	Top Under performers	% Change
TITAN	3.02	SBI	-2.39
TATA Con Prod.	2.44	ETERNAL	-1.51
Bajaj Finance	2.24	ITC	-1.21
Shriram Finance	2.04	Dr. Reddys Lab	-1.13
Grasim Ind	1.73	TCS	-1.10

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 7	MF Inv Aug 6	DII Inv Aug 10
Buy	13555	16639	15869
Sell	12535	12424	17159
Net	1021	4215	-1290
Net (YTD)	-237867	335223	504161

Policy rates	Aug 10	1W Ago	M Ago	3M Ago
Repo (%)	5.25	5.25	5.25	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00
Overnight rates	**Aug 10**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.10	5.10	5.35	5.20
10 Yr Gilt(%)^	6.77	6.84	6.71	6.98
TREP (%)	4.80	5.00	5.50	4.80
Short-term debt	**Aug 10**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	6.94	7.15	7.00	7.13
6-month CPs (%)	7.19	7.30	7.27	7.40
3-month CDs (%)	6.41	6.77	6.70	6.60
6-month CDs (%)	6.68	6.85	6.87	6.97
182-day T-bill (%)^	5.52	5.57	5.45	5.50
364-day T-bill (%)^	5.66	5.70	5.61	5.63
Long-term debt	**Aug 10**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.19	6.25	6.16	6.32
5-Y G-sec (%)	6.36	6.42	6.38	6.68
10-Y G-sec (%)	6.77	6.84	6.71	6.98

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed flat on Monday, as resilient corporate earnings and easing concerns over near-term US rate hikes helped offset pressure from elevated crude oil prices and lingering uncertainty surrounding the Strait of Hormuz.
- The top gainers were Titan Company, Tata Consumer Products, Bajaj Finance, Shriram Finance and Grasim Industries, up 1.73-3.02%.
- The top losers were State Bank of India, Eternal, ITC, Dr. Reddy's Laboratories and Tata Consultancy Services, down 1.10-2.39%.

Indian Debt

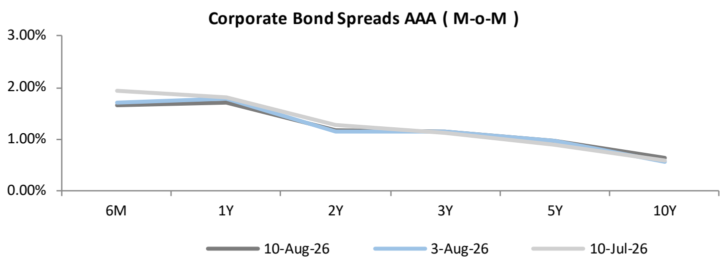
- The interbank call-money rate ended flat at 5.10% on Monday.
- Government bond prices ended flat on Monday, as lower US rate-hike expectations following weak US jobs data supported sentiment, while higher oil prices and caution ahead of domestic and US inflation data limited gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 6.77% on Monday.

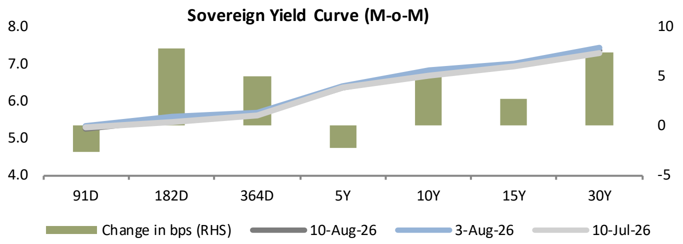
Economy and Government

- The Lok Sabha introduced four bills, including amendments related to tribunal reforms and mining laws, amid continued disruptions during the Monsoon Session that led to adjournments in both Houses of Parliament.
- The government has introduced the National Co-operative Development Corporation (Amendment) Bill, 2026 in the Lok Sabha, aimed at expanding the role of the NCDC and enhancing its capacity to provide financial support to the cooperative sector.
- Finance Minister Nirmala Sitharaman said that any future Merchant Discount Rate (MDR) on UPI payments would apply only to a limited set of merchant transactions above a specified threshold, while keeping UPI free for most users.
- Union Minister Nitin Gadkari said the Ministry of Road Transport and Highways is working towards significantly reducing road accident fatalities through enhanced safety measures and infrastructure improvements.
- Sebi has proposed increasing the maximum number of ISINs for privately placed debt securities that can mature in a financial year from 14 to 17. The proposal is aimed at easing liquidity and refinancing pressures for NBFCs and large corporates.
- TRAI has directed utilities, courier, and logistics service providers to use the 1601-series numbering for customer communications, aimed at improving transparency and curbing spam.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.72	7.31	8.03	8.11	9.34
3-Yr	6.19	7.42	8.14	8.22	9.45
5-Yr	6.36	7.43	8.25	8.33	9.56
10-Yr	6.77	7.50	8.32	8.40	9.63

* Weighted average yields





Global Indices	Aug 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	53976	-0.11	8.80	22.19
Nasdaq	26605	-0.32	1.37	24.03
FTSE 100	10863	-0.35	6.15	19.42
DAX	26324	0.02	8.16	8.94
Nikkei 225	66970	2.08	6.79	60.14
Hang Seng	25937	1.05	-1.73	4.34
KOSPI	6300	0.65	-15.98	96.25

Global 10 yr Sov. Yields (%)	Aug 10	1D Ago	3M Ago	1Y Ago
US	4.72	4.65	4.38	4.27
UK	5.00	4.93	4.92	4.60
German	3.17	3.13	3.00	2.69
Japan	2.82	2.80	2.48	1.49

Commodity Prices	Aug 10	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	87.72	83.55	101.29	66.59
NYMEX Crude Oil ($/bbl)	82.13	78.18	95.42	63.88
Gold (Rs / 10 gm)#	150641	149621	151078	100942

ibjarates spot prices

Currencies Vs INR	Aug 10	1D Ago	M Ago	3M Ago
USD	95.26	95.21	95.31	94.44
GBP	128.53	128.12	128.03	128.31
Euro	110.06	109.72	109.08	110.92
100 Yen	60.14	60.14	59.02	60.24
Forex Reserve ($ bn)*	692.87	682.35	674.19	690.69

* Data pertains to Jul 31 and Jul 24 respectively Source: CRISIL

Key Macro Indicators	
CPI	4.38% (Jun-2026)
WPI	9.58% (Jun'-2026)
IIP	7.30% (Jun' -2026)
GDP Growth Rate	7.8% (Jan-Mar FY'26)

Capital Market

- DBS Bank India has sanctioned a Rs 520 crore construction finance facility to a special purpose vehicle of K Raheja Corp for the development of a commercial tower in Pune.
- Sigma Advanced Systems raised Rs 460 crore through a preferential allotment to support expansion.
- The International Finance Corporation (IFC) has made an equity investment of Rs 225 crore in NDR Smart Spaces, to develop Grade A warehousing and logistics infrastructure across India.
- Milky Mist Dairy Food has raised Rs 465 crore from 19 anchor investors ahead of its IPO, indicating strong institutional demand for the public issue.

Global Equity

- Wall Street stocks closed lower on Monday, dragged down by sector specific losses and fading confidence in a potential deal to reopen the Strait of Hormuz.
- US 10yr yield ended higher at 4.72% tracking a spike in global crude oil prices.
- FTSE index closed lower on Monday due to profit booking and caution ahead of key economic data including US inflation and domestic growth data.
- Asian markets were trading mixed at 8.30 AM.

International

- Japan's Economy Watchers Survey Outlook rose to 45.80 points in July 2026 from 45.70 points in June while the services sector sentiment index also increased to 45.7 from 44.0.
- Japan's current account balance recorded a deficit of JPY 923 billion in June 2026, compared with a surplus of JPY 1.28 trillion a year earlier.
- Japan bank lending rose 5.4% in July 2026, compared to 5.7% increase in June 2026.

Upcoming market indicators

- US Inflation Rate, July (Aug 12)
- US CPI, July (Aug 12)
- India Inflation Rate, July (Aug 12)
- US Initial Jobless Claims, Aug/08 (Aug 13)
- UK GDP Growth Rate YoY Prel Q2 (Aug 13)
- UK GDP, June (Aug 13)
- Eurozone GDP Growth Rate YoY 2nd Est Q2 (Aug 14)
- India WPI Inflation, July (Aug 14)
- India Foreign Exchange Reserves, Aug/07 (Aug 14)
- China Industrial Production, July (Aug 17)
- India Balance of Trade, July (Aug 17)
- India Exports/Imports, July (Aug 17)
- India Unemployment Rate, July (Aug 17)
- US Industrial Production, July (Aug 18)
- US Manufacturing Production, July (Aug 18)
- US FOMC Minutes (Aug 19)
- Eurozone CPI Final, July (Aug 19)
- China Loan Prime Rate 1Y/5Y, Aug (Aug 20)
- India Infrastructure Output, July (Aug 20)
- Eurozone Consumer Confidence Flash, Aug (Aug 21)
- India Foreign Exchange Reserves, Aug/14 (Aug 21)