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La Creme De La Creme Services LLP

Daily Newsletter

August 12, 2026

Broad Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	78154	-0.49	2.81	-3.04	20.70
Nifty 50	24472	-0.46	2.75	-0.46	20.65
BSE Mid cap	49275	-0.07	5.05	9.69	NA
Nifty Midcap 100	63844	-0.02	7.27	13.04	31.00

Sectoral Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64845	-0.31	10.07	22.32
BSE Bankex	65050	-0.39	5.99	5.23
BSE CD	65630	-0.20	12.61	11.69
BSE CG	79282	-0.47	1.06	18.39
BSE FMCG	18324	-0.87	-3.42	-9.97
BSE Healthcare	51364	0.34	9.71	17.69
BSE IT	30482	0.37	6.83	-10.19
BSE Metal	41974	-0.53	-0.53	37.02
BSE Oil & Gas	26415	0.05	-1.71	0.88
BSE Power	7635	-0.54	-5.84	15.18
BSE Realty	6950	-1.03	11.47	0.46

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Dr. Reddys Lab	3.99	TATA Con Prod.	-2.77
ETERNAL	2.50	Max Health	-2.71
TCS	0.82	Nestle India	-2.32
TITAN	0.75	UltraTech	-2.14
Infosys	0.65	Apollo Hospital	-1.81

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 10	MF Inv Aug 6	DII Inv Aug 11
Buy	14642	16639	15007
Sell	11135	12424	14982
Net	3506	4215	25
Net (YTD)	-234361	335223	504186

Policy rates	Aug 11	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 11**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.08	4.60	5.35	4.75
10 Yr Gilt(%)^	6.78	6.82	6.71	7.04
TREP (%)	5.01	4.90	5.50	5.04
Short-term debt	**Aug 11**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	6.80	7.15	7.00	7.25
6-month CPs (%)	7.15	7.28	7.27	7.43
3-month CDs (%)	6.30	6.75	6.70	6.60
6-month CDs (%)	6.68	6.80	6.87	7.00
182-day T-bill (%)^	5.52	5.56	5.45	5.50
364-day T-bill (%)^	5.66	5.70	5.61	5.64
Long-term debt	**Aug 11**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.21	6.23	6.16	6.39
5-Y G-sec (%)	6.38	6.41	6.38	6.78
10-Y G-sec (%)	6.78	6.82	6.71	7.04

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Tuesday as investors booked profits, owing to rising crude oil prices, continued uncertainty over the reopening of the Strait of Hormuz and a potential US-Iran deal.
- The top losers were Tata Consumer Products, Max Healthcare Institute, Nestle India, UltraTech Cement and Apollo Hospitals Enterprise, down 1.81-2.77%.
- The top gainers were Dr. Reddy's Laboratories, Eternal, Tata Consultancy Services, Titan Company and Infosys, up 0.65-3.99%.

Indian Debt

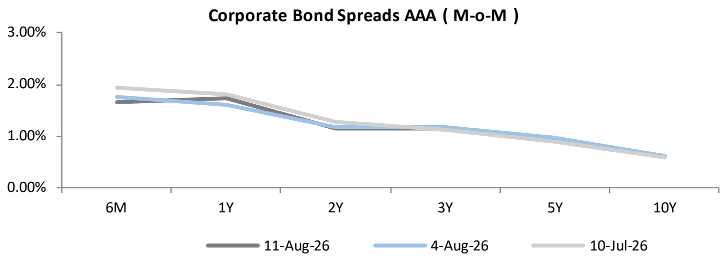
- The interbank call-money rate ended lower at 5.08% on Tuesday compared to 5.10% on Monday.
- Government bond prices ended lower on Tuesday, as higher oil prices and caution ahead of key inflation data weighed on sentiment.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 6.78% on Tuesday compared to 6.77% on Monday.

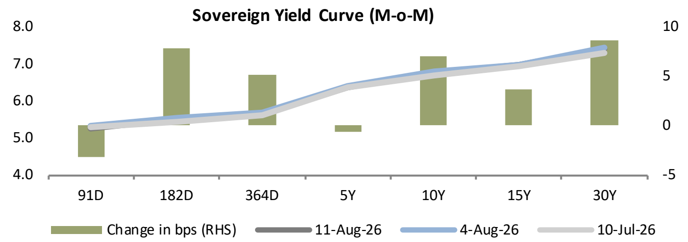
Economy and Government

- Ministry of Heavy Industries extended the PM E-DRIVE scheme by one year to March 2028, while reducing electric two-wheeler incentives by 50% to Rs 2,500 per kWh.
- The government has approved the introduction of one billion polymer banknotes in Rs 10 and Rs 20 denominations, aimed at enhancing durability and reducing replacement costs.
- RBI Governor Sanjay Malhotra has advocated greater use of local currencies, CBDCs, and payment platforms such as UPI for BRICS cross-border transactions, to improve payment efficiency and reduce transaction costs.
- RBI Governor Sanjay Malhotra has urged banks and financial institutions to accelerate investments in artificial intelligence and digital technologies, while maintaining strong governance and risk management frameworks.
- SEBI has proposed allowing Foreign Portfolio Investors (FPIs) to participate in physically settled non-agricultural commodity derivatives, including crude oil, natural gas, gold, and silver contracts, with the aim of improving market liquidity, enhancing price discovery, and aligning India's commodity markets with global practices.
- SEBI has proposed expanding vaulting norms for bullion ETFs and commodity derivatives by allowing a wider network of accredited vault managers, aimed at improving storage infrastructure, operational efficiency, and market development.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.75	7.32	8.04	8.12	9.35
3-Yr	6.21	7.43	8.15	8.23	9.46
5-Yr	6.38	7.44	8.26	8.34	9.57
10-Yr	6.78	7.51	8.33	8.41	9.64

* Weighted average yields





Global Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	53792	-0.34	8.22	22.32
Nasdaq	26445	-0.60	0.65	23.66
FTSE 100	10844	-0.17	5.60	18.78
DAX	26391	0.26	8.38	9.59
Nikkei 225	Closed	NA	NA	NA
Hang Seng	25653	-1.10	-2.86	3.00
KOSPI	6346	0.73	-18.88	97.88

Global 10 yr Sov. Yields (%)	Aug 11	1D Ago	3M Ago	1Y Ago
US	4.7	4.72	4.42	4.27
UK	4.97	5.00	5.03	4.56
German	3.15	3.18	3.04	2.70
Japan	2.81	2.82	2.51	4.56

Commodity Prices	Aug 11	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	88.91	87.72	104.21	66.63
NYMEX Crude Oil ($/bbl)	83.2	82.13	98.07	63.96
Gold (Rs / 10 gm)#	152803	150641	150362	99957

ibjarates spot prices

Currencies Vs INR	Aug 11	1D Ago	M Ago	3M Ago
USD	95.43	95.26	95.31	95.20
GBP	128.88	128.53	128.03	129.38
Euro	110.09	110.06	109.08	111.93
100 Yen	59.94	60.14	59.02	60.60
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

- Table Space has filed draft papers for an IPO comprising a fresh issue of shares worth Rs 800 crore, to support business expansion and growth initiatives.
- Jupiter Wagons secured freight wagon orders worth Rs 211 crore from JSW Group and OASPL and has also won two battery energy storage system (BESS) projects in West Bengal worth around Rs 400 crore.
- Tribeca Developers and IRA Realty plan to invest Rs 2,000 crore to develop Trump Towers in Hyderabad, expanding the luxury residential real estate segment in the city.
- ONGC and Shell Energy India have signed an MoU to explore opportunities in deepwater oil and gas blocks and LNG projects in India, strengthening collaboration in the energy sector.

Global Equity

- Wall Street stocks closed lower on Tuesday due to weakness in tech stocks and rising pessimism over a Middle East deal amid heightened geopolitical tensions.
- US 10-yr yield ended lower at 4.70% as investors monitored tensions in the Middle East with focus on inflation data due later in the week.
- FTSE index closed lower on Tuesday dragged down by stock-specific weakness.
- Asian markets were trading lower at 8.30 AM.

International

- US NFIB Small Business Optimism Index jumped to 99.8 in July 2026 compared to 97.4 in June 2026.
- US Existing Home Sales dropped by 1.7% to 4.05 million units in July 2026, compared to 1.4% decline in June 2026.

Upcoming market indicators

- US ADP Employment Change Weekly (Aug 11)
- US Existing Home Sales, July (Aug 11)
- 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)