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La Creme De La Creme Services LLP

Daily Newsletter

August 13, 2026

Broad Indices	Aug 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77966	-0.24	4.57	-2.83	20.65
Nifty 50	24436	-0.15	4.52	-0.21	20.62
BSE Mid cap	49204	-0.14	7.69	9.81	NA
Nifty Midcap 100	64024	0.28	7.57	13.67	30.92

Sectoral Indices	Aug 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64623	-0.34	12.28	21.20
BSE Bankex	65447	0.61	8.48	6.75
BSE CD	65438	-0.29	16.17	11.93
BSE CG	79861	0.73	4.78	20.16
BSE FMCG	18173	-0.82	-2.62	-10.32
BSE Healthcare	50963	-0.78	10.62	16.29
BSE IT	30053	-1.41	9.34	-11.70
BSE Metal	42118	0.34	0.29	36.99
BSE Oil & Gas	26402	-0.05	-1.75	0.23
BSE Power	7646	0.14	-3.17	15.07
BSE Realty	6900	-0.71	15.54	0.50

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Hindalco Ind	2.80	TCS	-3.93
Bharti Airtel	1.56	Max Health	-3.13
SBI	1.50	Apollo Hospitals	-1.75
Jio Financial	1.31	M&M	-1.63
UltraTech	0.94	TATA Con. Prod.	-1.49

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 11	MF Inv Aug 6	DII Inv Aug 12
Buy	14949	16639	21519
Sell	15121	12424	15677
Net	-173	4215	5842
Net (YTD)	-234533	335223	510027

Policy rates	Aug 12	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 12**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.12	4.60	5.35	4.75
10 Yr Gilt(%)^	6.78	6.78	6.71	7.05
TREP (%)	5.02	5.01	5.50	5.05
Short-term debt	**Aug 12**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	6.90	7.15	7.00	7.40
6-month CPs (%)	7.08	7.28	7.27	7.52
3-month CDs (%)	6.40	6.75	6.70	6.65
6-month CDs (%)	6.72	6.80	6.87	7.05
182-day T-bill (%)^	5.52	5.54	5.45	5.49
364-day T-bill (%)^	5.67	5.66	5.61	5.66
Long-term debt	**Aug 12**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.19	6.22	6.16	6.45
5-Y G-sec (%)	6.37	6.33	6.38	6.80
10-Y G-sec (%)	6.78	6.78	6.71	7.05

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Wednesday as uncertainty over the reopening of the Strait of Hormuz and a potential US-Iran deal, along with caution ahead of key US and India inflation data, weighed on investor sentiment.
- The top losers were Tata Consultancy Services, Max Healthcare Institute, Apollo Hospitals Enterprise, Mahindra & Mahindra and Tata Consumer Products, down 1.49-3.93%.
- The top gainers were UltraTech Cement, Jio Financial Services, Hindalco Industries, Bharti Airtel and State Bank of India, up 0.94-2.80%.

Indian Debt

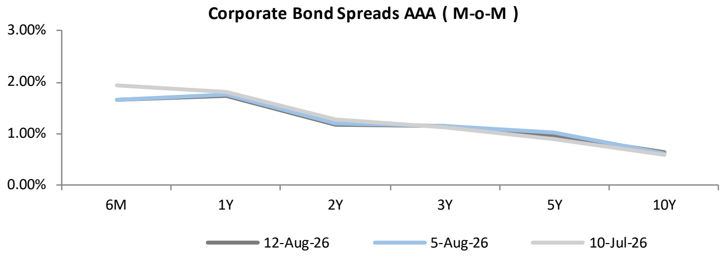
- The interbank call-money rate ended higher at 5.12% on Wednesday compared to 5.08% on Tuesday.
- Government bond prices ended flat on Wednesday as investors remained cautious ahead of key US inflation data, while intermittent fall in crude oil prices supported the sentiment.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 6.78% on Wednesday.

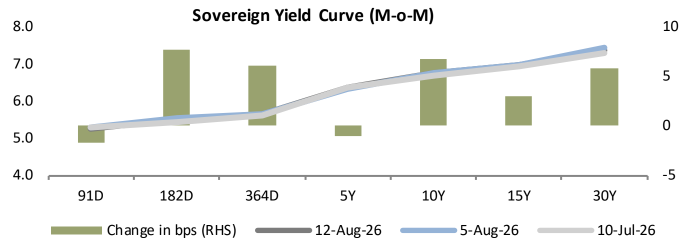
Economy and Government

- India's inflation rate rose to 4.45% in July 2026 compared to 4.38% in June 2026.
- The Lok Sabha has passed a bill to amend mining regulations, barring state governments from levying additional taxes on mineral rights and vesting greater control over mineral-bearing lands with the central government.
- The government has proposed referring the Foreign Contribution Regulation Amendment Bill, 2026, to a Joint Committee of Parliament for detailed examination and stakeholder consultation.
- The Rajya Sabha has approved the National Co-operative Development Corporation (Amendment) Bill, enabling the NCDC to provide direct financial assistance to cooperative societies and related entities, thereby strengthening access to funding for the cooperative sector.
- The Reserve Bank of India (RBI) has proposed a harmonised framework for loan interest rates across regulated entities, introducing stricter norms for benchmark-linked lending and standardised interest calculation practices to improve transparency and consistency in loan pricing.
- SEBI Chairman Tuhin Kanta Pandey has stated that the regulator has not observed any evidence of manipulation in the new Closing Auction Session (CAS) mechanism so far, although it continues to closely monitor market data amid concerns over participation and price discovery. The regulator expects participation to improve over time, with the framework likely to benefit passive investment products such as index funds and ETFs.
- SEBI is reviewing margin and position-limit frameworks for commodity derivatives to reduce participation costs, improve market efficiency, and broaden investor participation, while maintaining adequate risk management safeguards and market stability.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.72	7.32	8.04	8.12	9.35
3-Yr	6.19	7.43	8.15	8.23	9.46
5-Yr	6.37	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 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	53770	-0.04	8.06	20.94
Nasdaq	26588	0.54	1.92	22.63
FTSE 100	10833	-0.10	5.53	18.42
DAX	26331	-0.23	9.92	9.60
Nikkei 225	67524	0.83	7.62	58.07
Hang Seng	25440	-0.83	-3.45	1.88
KOSPI	6579	3.68	-13.92	106.25

Global 10 yr Sov. Yields (%)	Aug 12	1D Ago	3M Ago	1Y Ago
US	4.68	4.70	4.46	4.29
UK	4.97	4.97	5.11	4.62
German	3.15	3.16	3.10	2.74
Japan	2.85	2.81	2.56	1.51

Commodity Prices	Aug 12	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	88.98	88.91	107.77	66.12
NYMEX Crude Oil ($/bbl)	83.27	83.20	102.18	63.17
Gold (Rs / 10 gm)#	153419	152803	151632	99670

ibjarates spot prices

Currencies Vs INR	Aug 12	1D Ago	M Ago	3M Ago
USD	95.43	95.43	95.31	95.56
GBP	128.88	128.88	128.03	129.57
Euro	110.07	110.09	109.08	112.34
100 Yen	59.86	59.94	59.02	60.71
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	4.45% (Jul'-2026)
WPI	9.58% (Jun'-2026)
IIP	7.30% (Jun' -2026)
GDP Growth Rate	7.8% (Jan-Mar FY'26)

Capital Market

- NDR InvIT filed draft papers for a Rs 750 crore IPO, with the proceeds proposed to be used for expanding its warehousing and logistics infrastructure portfolio.
- Axis Bank raised $300 million from international investors to support its growth initiatives and strengthen its funding profile.
- Yulu has raised $93 million through a mix of equity and debt funding, which will be used to expand its electric vehicle fleet and strengthen its urban mobility network across India.
- Jio Financial Services (JFSL) and Bank of America (BofA) have signed a definitive agreement under which BofA will invest up to Rs 18,268 crore to acquire a 49.9% stake in Jio Credit, creating a strategic lending joint venture to expand credit offerings in India.
- Tenneco Mauritius Holdings has sold 15% stake in Tenneco Clean Air India through multiple block deals with the total transaction value estimated at Rs 3,180 crore.

Global Equity

- Wall Street stocks closed mixed on Wednesday with Nasdaq gaining on strength in technology stocks ahead of inflation data release while Dow Jones declined due to sector specific losses.
- US 10yr yield ended lower at 4.68% as investors assessed latest inflation reading.
- FTSE index closed lower on Wednesday as investors were cautious amid Middle East developments.
- Asian markets were trading higher at 8.30 AM.

International

- The US inflation rate slowed to 3.4% in July 2026, compared with 3.5% in June while core inflation rate eased to 2.5% from 2.6%.
- China's total vehicle sales fell 0.3% in July 2026, compared to a 3.2% decline in June 2026.
- Japan producer prices rose 7.2% in July 2026, compared to a marginally revised 7.3% increase in June 2026.
- Japan machine tool orders climbed by 50.4% in July 2026, compared to a 52.8% surge in June 2026.

Upcoming market indicators

- 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)