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La Creme De La Creme Services LLP

Daily Newsletter

August 21, 2026

Broad Indices	Aug 20	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77538	0.82	2.95	-5.28	20.54
Nifty 50	24232	0.64	2.42	-3.27	20.48
BSE Mid cap	49103	0.51	5.73	6.63	NA
Nifty Midcap 100	63672	0.41	6.98	9.91	30.69

Sectoral Indices	Aug 20	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64702	0.41	13.46	13.50
BSE Bankex	65111	0.49	7.91	4.91
BSE CD	65093	0.37	13.40	6.51
BSE CG	79169	0.10	2.45	17.94
BSE FMCG	18103	1.03	-2.86	-13.16
BSE Healthcare	50713	0.24	6.38	13.97
BSE IT	29457	0.94	4.06	-15.91
BSE Metal	41698	0.24	-2.88	31.71
BSE Oil & Gas	26143	0.08	-3.26	-0.93
BSE Power	7494	0.29	-7.20	12.61
BSE Realty	7095	1.87	18.47	0.04

Nifty			
Top Out performers	% Change	Top Under performers	% Change
ETERNAL	2.48	TATA Con Prod	-1.10
Shriram Finance	2.01	HINDALCO	-0.88
KOTAK BANK	1.82	InterGlobe	-0.54
ITC	1.72	HCL Tech	-0.48
Bajaj Finance	1.37	Nestle India	-0.48

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 19	MF Inv Aug 13	DII Inv Aug 20
Buy	13414	13498	16933
Sell	12918	8926	13395
Net	495	4572	3538
Net (YTD)	-227993	341911	529929

Policy rates	Aug 20	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 20**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.20	4.99	5.30	4.75
10 Yr Gilt(%)^	6.87	6.76	6.78	7.08
TREP (%)	5.05	4.95	5.04	5.07
Short-term debt	**Aug 20**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	7.10	6.87	7.35	7.83
6-month CPs (%)	7.28	7.08	7.45	8.00
3-month CDs (%)	6.53	6.35	6.85	7.30
6-month CDs (%)	6.87	6.70	7.05	7.50
182-day T-bill (%)^	5.61	5.53	5.53	5.70
364-day T-bill (%)^	5.72	5.68	5.62	5.96
Long-term debt	**Aug 20**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.28	6.19	6.22	6.58
5-Y G-sec (%)	6.52	6.35	6.47	6.86
10-Y G-sec (%)	6.87	6.76	6.78	7.08

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Thursday, supported by gains in IT and financial stocks and continued foreign fund inflows.
- The top gainers were Eternal, Shriram Finance, Kotak Mahindra Bank, ITC and Bajaj Finance, up 1.37-2.48%.
- The top losers were Tata Consumer Products, Hindalco Industries, InterGlobe Aviation, Nestle India and HCL Technologies, down 0.48-1.10%.

Indian Debt

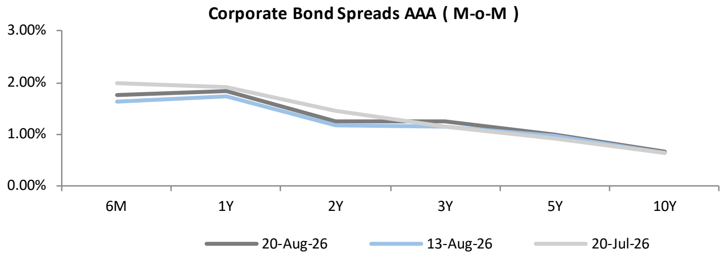
- The interbank call-money rate ended higher at 5.20% on Thursday compared to 5.15% on Wednesday.
- Government bond prices ended lower on Thursday as the RBI's policy meeting minutes raised concerns over future rate hikes, while higher oil prices added pressure.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 6.87% on Thursday compared to 6.82% on Wednesday.

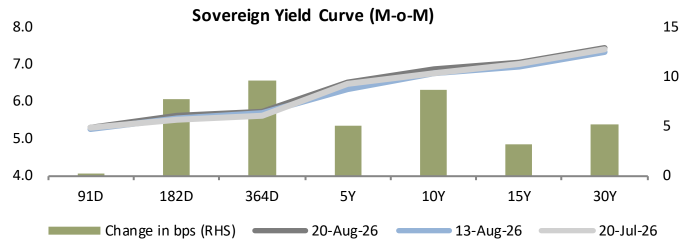
Economy and Government

- India's infrastructure output rose 5.4% year-on-year in July 2026, following an upwardly revised 6% increase in the previous month.
- India and Japan signed a memorandum of arrangement on maritime security, emphasizing pragmatic operational cooperation.
- India and Mauritius signed a long-term fuel supply agreement under which India will supply petrol, diesel and aviation turbine fuel (ATF) to Mauritius, strengthening bilateral energy cooperation.
- Uttar Pradesh attracted Rs 35,000 crore in renewable energy investments, reinforcing the state's position as a major clean energy investment destination.
- RBI Governor Sanjay Malhotra said the central bank expects at least $80 billion in foreign-currency inflows from recent rupee-support measures, with inflows already reaching $56.85 billion through FCNR(B) deposits and overseas borrowings.
- RBI Governor Sanjay Malhotra emphasized that any evidence of inflation becoming broad-based or inflation expectations becoming unanchored may require policy tightening.
- SEBI eased compliance norms for Foreign Portfolio Investors (FPIs) by allowing digital powers of attorney (PoAs) and waiving requirements for notarisation and apostillisation of certain documents, facilitating smoother market access.
- SEBI plans to test bond tokenisation and deepen the corporate bond repo market to improve liquidity and broaden participation in debt markets.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.80	7.50	8.22	8.30	9.53
3-Yr	6.28	7.61	8.33	8.41	9.64
5-Yr	6.52	7.62	8.44	8.52	9.75
10-Yr	6.87	7.64	8.46	8.54	9.77

* Weighted average yields





Global Indices	Aug 20	1D % Chg	3M % Chg	1Y % Chg
DJIA	52759	-1.32	5.50	17.40
Nasdaq	26067	-1.00	-0.77	23.12
FTSE 100	10748	0.04	3.03	15.72
DAX	25983	-0.42	5.04	7.03
Nikkei 225	66217	1.36	10.72	54.39
Hang Seng	25698	0.80	0.18	2.12
KOSPI	6853	5.89	-4.94	118.93

Global 10 yr Sov. Yields (%)	Aug 20	1D Ago	3M Ago	1Y Ago
US	4.69	4.65	4.57	4.29
UK	5.06	5.06	4.99	4.67
German	3.25	3.26	3.09	2.72
Japan	2.86	2.90	2.76	1.61

Commodity Prices	Aug 20	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	93.78	91.62	105.02	66.84
NYMEX Crude Oil ($/bbl)	86.83	85.83	98.26	62.71
Gold (Rs / 10 gm)#	157080	153868	158555	98946

ibjarates spot prices

Currencies Vs INR	Aug 20	1D Ago	M Ago	3M Ago
USD	95.64	95.75	96.51	96.84
GBP	130.17	129.77	129.94	129.77
Euro	111.73	111.03	110.39	112.37
100 Yen	60.35	60.15	59.43	60.94
Forex Reserve ($ bn)*	707.00	692.87	675.16	696.99

* Data pertains to Aug 7 and Jul 31 respectively Source: CRISIL

Key Macro Indicators	
CPI	4.45% (Jul-2026)
WPI	9.78% (Jul'-2026)
IIP	7.30% (Jun' -2026)
GDP Growth Rate	7.8% (Jan-Mar FY'26)

Capital Market

- Aditya Infotech's board approved raising up to Rs 1,500 crore through securities issuance, including public issues, Qualified Institutional Placements (QIPs), or other permissible routes.
- BSE entered into an agreement with MSCI for selected indices and will explore launching futures and options contracts linked to these indices in India, subject to regulatory approvals, providing investors with additional tools to gain and hedge exposure to Indian markets.
- Larsen & Toubro's transportation infrastructure business has secured an order worth up to Rs 5,000 crore to design and build the Automated People Mover system for Phase 1 of Al Maktoum International Airport in Dubai.
- Della Townships plans to launch projects worth Rs 46,480 crore this financial year, with 12 developments starting in Pune, Ahmedabad, Raipur and Nagpur.

Global Equity

- Wall Street stocks declined on Thursday as rising Treasury yields, and higher oil prices revived inflation concerns and as disappointing sales result from a major company raised concerns over consumer spending.
- US 10yr yield ended higher at 4.69% buoyed by persistent inflation concerns and elevated government debt.
- FTSE index ended flat on Thursday as gains in mining and energy stocks were offset by disappointing profit outlook announced by major sports-fashion retail company.
- Asian markets were trading mixed at 8.30 AM.

International

- US initial jobless claims fell by 6,000 to 206,000 in the second week of August, compared to 212,000 in the previous period.
- Eurozone construction output declined 0.7% year-on-year in June 2026, after a downwardly revised 0.7% increase in May.
- Japan inflation accelerated to 1.9% in July 2026 from a marginally revised 1.6% (from 1.7% earlier) in the previous month, while core inflation increased to 1.8% from 1.6%.
- Japan's S&P Global Manufacturing PMI increased to 55.1 in August 2026 from 54.5 in the previous month and Services PMI rose to 52.3 from 51.2 while composite PMI rose to 53.4 in August 2026 from 52.7 in July.

Upcoming market indicators

- Eurozone Consumer Confidence Flash, Aug (Aug 21)
- India Foreign Exchange Reserves, Aug/14 (Aug 21)