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La Creme De La Creme Services LLP

Daily Newsletter

August 25, 2026

Broad Indices	Aug 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77369	-0.22	2.59	-4.84	20.50
Nifty 50	24219	-0.14	2.11	-2.62	20.47
BSE Mid cap	49136	-0.06	5.43	7.07	NA
Nifty Midcap 100	63817	0.13	7.23	10.74	30.76

Sectoral Indices	Aug 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64192	-0.11	12.05	13.27
BSE Bankex	65141	-0.35	6.96	5.96
BSE CD	65011	-0.41	12.36	7.15
BSE CG	79096	-0.16	1.00	17.79
BSE FMCG	17986	0.03	-3.04	-12.36
BSE Healthcare	50574	0.06	6.99	12.87
BSE IT	29402	0.23	4.76	-15.44
BSE Metal	42373	1.38	-2.25	35.67
BSE Oil & Gas	26180	0.34	-3.48	-0.18
BSE Power	7547	0.08	-6.61	14.93
BSE Realty	7139	0.43	18.10	1.04

Nifty			
Top Out performers	% Change	Top Under performers	% Change
JSW Steel	2.57	SBI Life Insu	-1.73
HINDALCO	2.37	Adani Ports	-1.64
Tata Steel	1.80	Bajaj Finance	-1.64
HCL Tech	1.50	Bajaj Finserv	-1.52
Dr. Reddys Lab	1.30	BEL	-1.21

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 21	MF Inv Aug 13	DII Inv Aug 24
Buy	15348	13498	15337
Sell	13374	8926	12844
Net	1974	4572	2493
Net (YTD)	-226291	341911	534547

Policy rates	Aug 24	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 24**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.20	5.20	5.12	5.37
10 Yr Gilt(%)^	6.87	6.81	6.83	7.09
TREP (%)	4.85	4.90	5.04	5.24
Short-term debt	**Aug 24**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	7.18	6.84	7.38	8.05
6-month CPs (%)	7.40	7.10	7.45	8.15
3-month CDs (%)	6.48	6.40	6.82	7.40
6-month CDs (%)	6.90	6.70	6.94	7.75
182-day T-bill (%)^	5.58	5.54	5.57	5.82
364-day T-bill (%)^	5.75	5.68	5.73	5.93
Long-term debt	**Aug 24**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.25	6.19	6.22	6.69
5-Y G-sec (%)	6.49	6.43	6.49	6.93
10-Y G-sec (%)	6.87	6.81	6.83	7.09

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed lower on Monday, weighed down by uncertainty over potential US sanctions on Iran.
- The top losers were SBI Life Insurance Company, Adani Ports and Special Economic Zone, Bajaj Finance, Bajaj Finserv and Bharat Electronics, down 1.21-1.73%.
- The top gainers were JSW Steel, Hindalco Industries, Tata Steel, HCL Technologies and Dr. Reddy's Laboratories, up 1.30-2.57%.

Indian Debt

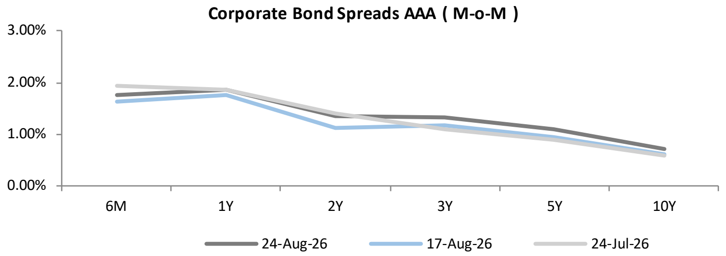
- The interbank call-money rate ended flat at 5.20% on Monday.
- Government bond prices ended lower on Monday as concerns over potential US sanctions on Iran fuelled fears of higher oil prices and inflation.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 6.87% on Monday compared to 6.85% on Friday.

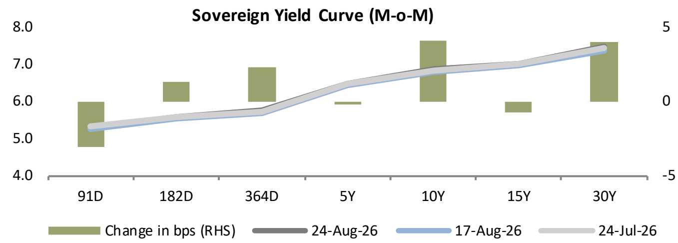
Economy and Government

- External Affairs Minister S. Jaishankar said India-Russia economic cooperation has expanded significantly, driven by stronger trade, energy and strategic ties.
- India plans to launch its first tokenised corporate bond issuance using blockchain technology in September, marking a major step in digital capital market innovation.
- Ministry of Food Processing Industries (MoFPI) has proposed extending the PM Formalisation of Micro Food Processing Enterprises (PMFME) Scheme beyond its current tenure to 2031, after achieving its target of supporting 2 lakh micro food processing units.
- Uttar Pradesh Government signed four MoUs with Japan's Yamanashi Prefecture and launched a Rs 600 crore MSME fund to attract Japanese investments into the state.
- Directorate General of Foreign Trade (DGFT) permitted exports of wheat, including durum wheat, as well as wheat flour and related products, easing previous export restrictions.
- SEBI introduced an IT Resilience Index for market infrastructure institutions, a 100-point framework to assess cybersecurity, system resilience and operational continuity twice a year, with real-time monitoring and early-warning mechanisms to be implemented by February 2027.
- SEBI has urged the Ministry of Corporate Affairs (MCA) to permit fractional share ownership under the proposed Companies Amendment Bill, aimed at improving retail investor participation in high-priced stocks.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.76	7.54	8.26	8.34	9.57
3-Yr	6.25	7.67	8.39	8.47	9.70
5-Yr	6.49	7.68	8.50	8.58	9.81
10-Yr	6.87	7.69	8.51	8.59	9.82

* Weighted average yields





Global Indices	Aug 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	53417	0.26	5.61	17.06
Nasdaq	25980	-0.76	-1.38	20.86
FTSE 100	10854	0.35	3.71	16.45
DAX	26107	-0.11	4.89	7.16
Nikkei 225	65528	-0.74	3.46	53.70
Hang Seng	25517	-1.89	-0.35	0.70
KOSPI	6697	-3.12	-14.66	111.35

Global 10 yr Sov. Yields (%)	Aug 24	1D Ago	3M Ago	1Y Ago
US	4.7	4.74	4.56	4.26
UK	5.05	5.06	4.91	4.69
German	3.24	3.26	3.03	2.72
Japan	2.88	2.88	2.76	1.62

Commodity Prices	Aug 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	92.17	94.39	103.54	67.73
NYMEX Crude Oil ($/bbl)	85.01	87.06	96.6	63.66
Gold (Rs / 10 gm)#	162154	160620	158117	99358

ibjarates spot prices

Currencies Vs INR	Aug 24	1D Ago	M Ago	3M Ago
USD	95.73	95.75	96.54	95.96
GBP	130.58	130.66	128.53	128.79
Euro	111.78	111.97	109.87	111.39
100 Yen	60.22	60.24	58.93	60.31
Forex Reserve ($ bn)*	716.91	707.00	676.24	688.89

* Data pertains to Aug 14 and Aug 7 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

- Piramal Finance plans to raise Rs 2100 crore via Qualified Institutions Placement (QIP).
- SBI Mutual Fund's Magnum Equity Ex-Top 100 Long Short Fund mobilised Rs 1,154 crore, marking the highest NFO collection in the Equity SIF category and indicating investor interest in differentiated strategies.
- UCO Bank approved a plan to raise up to $1 billion in foreign currency funds through debt instruments under its Medium Term Note (MTN) Programme.
- Avaada Electro plans to publicly file for an IPO that could raise up to $800 million, joining the growing pipeline of renewable energy-related listings.

Global Equity

- Wall Street stocks closed mixed on Monday with Dow Jones posting gains driven by financial stocks, while Nasdaq slipped as technology shares remained under pressure amid persistent geopolitical concerns.
- US 10yr yield ended lower at 4.70% amid profit booking at higher level.
- FTSE index closed higher on Monday, supported by gains in mining stocks as investors remained cautious ahead of key global macroeconomic data releases.
- Asian markets were trading mixed at 8.30 AM.

International

- US Chicago Fed National Activity Index (CFNAI) edged down to 0.08 in July 2026 compared to 0.06 rise in June 2026.

Upcoming market indicators

- US CB Consumer Confidence, Aug (Aug 25)
- US Richmond Fed Manufacturing Index, Aug (Aug 25)
- US ADP Employment Change Weekly (Aug 25)
- US GDP Growth Rate QoQ 2nd Est Q2 (Aug 26)
- US PCE Price Index, July (Aug 26)
- US Initial Jobless Claims, Aug/22 (Aug 27)
- China Industrial Profits (YTD), July (Aug 27)
- Eurozone Industrial Sentiment, Aug (Aug 28)
- India Industrial Production, July (Aug 28)
- India Manufacturing Production, July (Aug 28)
- Japan Retail Sales, July (Aug 28)
- Japan Industrial Production YoY Prel, July (Aug 31)
- India GDP Growth Rate YoY Q1FY27 (Aug 31)
- India Government Budget Value, July (Aug 31)