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La Creme De La Creme Services LLP

Daily Newsletter

August 26, 2026

Broad Indices	Aug 25	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77656	0.37	1.53	-4.88	20.57
Nifty 50	24335	0.48	1.26	-2.54	20.57
BSE Mid cap	49292	0.32	4.89	7.30	NA
Nifty Midcap 100	64163	0.54	7.81	11.20	30.91

Sectoral Indices	Aug 25	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64369	0.28	10.41	13.01
BSE Bankex	65149	0.01	4.59	6.00
BSE CD	65539	0.81	12.04	7.52
BSE CG	79259	0.21	0.71	18.52
BSE FMCG	18032	0.26	-2.73	-12.06
BSE Healthcare	50901	0.65	7.20	13.58
BSE IT	29492	0.31	4.84	-17.11
BSE Metal	42554	0.43	-2.36	35.33
BSE Oil & Gas	26254	0.28	-4.65	0.03
BSE Power	7559	0.16	-7.34	15.13
BSE Realty	7158	0.28	16.79	0.57

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Enterp	3.72	HDFC Life	-1.13
Max Health	2.57	CIPLA	-1.11
Apollo Hospitals	2.15	ONGC	-1.08
INDIGO	2.01	Coal India	-0.71
Adani Ports	1.83	Hindalco	-0.70

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 24	MF Inv Aug 13	DII Inv Aug 25
Buy	12943	13498	14280
Sell	11275	8926	14050
Net	1668	4572	230
Net (YTD)	-224623	341911	534777

Policy rates	Aug 25	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 25**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.20	4.90	5.12	5.35
10 Yr Gilt(%)^	6.85	6.82	6.83	7.03
TREP (%)	5.07	4.60	5.04	5.09
Short-term debt	**Aug 25**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	7.15	6.95	7.38	8.05
6-month CPs (%)	7.30	7.13	7.45	8.20
3-month CDs (%)	6.48	6.40	6.82	7.50
6-month CDs (%)	6.80	6.73	6.94	7.80
182-day T-bill (%)^	5.58	5.54	5.57	5.82
364-day T-bill (%)^	5.73	5.68	5.73	5.87
Long-term debt	**Aug 25**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.27	6.21	6.22	6.56
5-Y G-sec (%)	6.46	6.46	6.49	6.85
10-Y G-sec (%)	6.85	6.82	6.83	7.03

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Tuesday, as a decline in crude oil prices eased concerns around imported inflation and corporate costs. Also, supporting the benchmarks was buying in financial and IT stocks.
- The top gainers were Adani Enterprises, Max Healthcare Institute, Apollo Hospitals Enterprise, InterGlobe Aviation and Adani Ports and Special Economic Zone, up 1.83-3.72%.
- The top losers were HDFC Life Insurance Company, Cipla, Oil and Natural Gas Corporation, Coal India and Hindalco Industries, down 0.70-1.13%.

Indian Debt

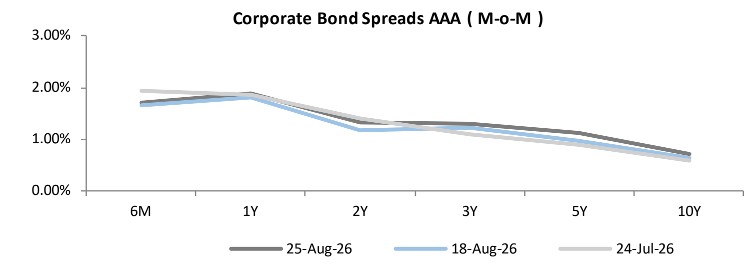
- The interbank call-money rate ended flat at 5.20% on Tuesday.
- Government bond prices ended higher on Tuesday due to easing crude oil prices and strong demand at a state debt auction.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.85% on Tuesday compared to 6.87% on Monday.

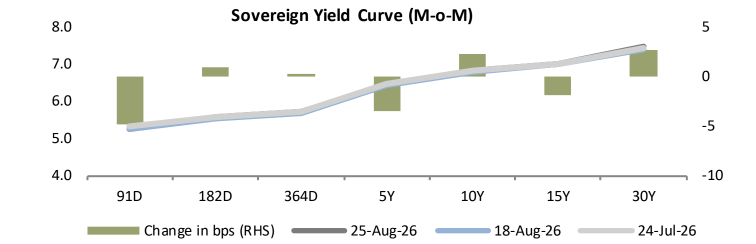
Economy and Government

- According to RBI's latest monthly bulletin the economy has demonstrated notable resilience to the ongoing global headwinds, characterised by buoyant domestic demand and rising manufacturing and services activity.
- The Reserve Bank of India (RBI) Bulletin for August has flagged the risk of broader inflationary pressures, warning that higher food, fuel and other input costs could push up prices across the economy.
- According to an Economic Advisory Council to the Prime Minister (EAC-PM) working paper, Indian banks will need to step up mobilisation of stable deposits as credit growth continues to outpace deposit growth, pushing up their cost of funds and increasing reliance on alternative sources of funding.
- According to a monthly government report for July 2026, infrastructure projects worth more than Rs 150 crore each recorded a cumulative cost overrun of around Rs 3,40,504 crore.
- The Union government has revised the conditions for the import of duty-free raw sugar, removing the October 31 deadline to process the imported sugar and sell the refined product in the domestic market.
- Uttar Pradesh CM Yogi Adityanath announced 100,000 government job appointments over the next six months.
- Defence Minister Rajnath Singh has approved the transfer of DRDO-developed technologies for all conventional missile systems to the Indian defence industry for domestic production.
- The Reserve Bank of India (RBI) proposed that NBFC shall only offer credit products which are in nature of term loans and shall not offer any revolving credit products.
- The Competition Commission of India (CCI) cleared global engineering services provider Cyient's proposed acquisition of TAO Digital Solutions Inc.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.75	7.53	8.25	8.33	9.56
3-Yr	6.27	7.66	8.38	8.46	9.69
5-Yr	6.46	7.67	8.49	8.57	9.80
10-Yr	6.85	7.69	8.51	8.59	9.82

* Weighted average yields





Global Indices	Aug 25	1D % Chg	3M % Chg	1Y % Chg
DJIA	53577	0.30	5.93	18.32
Nasdaq	26151	0.66	-0.73	21.92
FTSE 100	10886	0.29	4.01	16.79
DAX	26266	0.61	3.45	8.21
Nikkei 225	65856	0.50	1.07	53.84
Hang Seng	25511	-0.02	-0.37	-1.23
KOSPI	6743	0.68	-14.08	110.06

Global 10 yr Sov. Yields (%)	Aug 25	1D Ago	3M Ago	1Y Ago
US	4.64	4.70	4.56	4.28
UK	4.98	5.06	4.91	4.69
German	3.20	3.25	2.95	2.76
Japan	2.89	2.88	2.70	1.62

Commodity Prices	Aug 25	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	88.58	92.17	96.14	68.8
NYMEX Crude Oil ($/bbl)	82.36	85.01	96.6	64.8
Gold (Rs / 10 gm)#	162041	162154	158857	100488

ibjarates spot prices

Currencies Vs INR	Aug 25	1D Ago	M Ago	3M Ago
USD	95.71	95.73	96.54	95.20
GBP	130.42	130.58	128.53	128.35
Euro	111.57	111.78	109.87	110.82
100 Yen	60.07	60.22	58.93	59.91
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

- MATTER raises $25 million to expand manufacturing, launch four motorcycles.
- Nexedge Capital raises $20 million to expand wealth management platform.
- Avaada Group has signed an MoU with the Haryana Enterprises Promotion Centre to develop a 300-acre zero-CBAM green industrial campus in Hisar, with a proposed investment of about Rs 10,000 crore.
- AM Green plans to invest more than Rs 10,000 crore to set up five bio-refineries across states including Uttar Pradesh, Andhra Pradesh and Madhya Pradesh by 2030.

Global Equity

- Wall Street stocks closed higher on Tuesday due to gains in technology stocks ahead of Nvidia earnings along with easing oil prices.
- US 10yr yield ended lower at 4.64% tracking persistent fall in crude oil prices.
- FTSE index closed higher on Tuesday driven by gains in housing stocks following government's affording housing plan.
- Asian markets were trading higher at 8.30 AM.

International

- According to ADP Research Institute, US private employers added an average of 11,750 jobs per week in the four weeks ending August 8, 2026, up from 9,500 in the previous four-week period.
- US building permits rose 4.3% month-on-month to a seasonally adjusted annual rate of 1.433 million in July 2026.
- US House Price Index rose 2.3% year-on-year in June 2026, following a 2.4% increase in June.
- US Richmond Fed Manufacturing Index edged down to 4 in August 2026 from 5 in July.
- Japan's Coincident Index increased to 118.5 in June 2026 compared to 117.9 in May 2026.

Upcoming market indicators

- 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)