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La Creme De La Creme Services LLP

Daily Newsletter

September 08, 2026

Broad Indices	Sep 7	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76133	-0.50	2.54	-5.67	20.17
Nifty 50	23779	-0.50	1.77	-3.89	20.10
BSE Mid cap	48418	-0.67	4.52	6.51	NA
Nifty Midcap 100	62786	-0.46	5.49	10.01	30.26

Sectoral Indices	Sep 7	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61423	0.03	6.58	4.31
BSE Bankex	64615	-0.45	5.10	6.80
BSE CD	62881	-0.57	7.21	0.77
BSE CG	77686	-0.23	-2.91	16.20
BSE FMCG	17357	-0.65	-3.18	-16.31
BSE Healthcare	51277	0.71	9.31	15.87
BSE IT	28782	-2.11	1.99	-15.47
BSE Metal	41721	-1.36	-3.45	29.71
BSE Oil & Gas	26017	-0.58	-2.03	0.68
BSE Power	7445	-0.41	-8.48	13.81
BSE Realty	6990	-1.45	16.58	3.06

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Apollo Hospitals	1.27	Infosys	-3.76
L&T	0.88	HDFC Life	-2.42
Coal India	0.84	SBI Life	-2.42
Bharti Airtel	0.76	Jio Financial	-2.13
Max Healthcare	0.73	Tech Mahindra	-2.06

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 4	MF Inv Sep 2	DII Inv Sep 7
Buy	13067	13325	13154
Sell	19517	11413	12587
Net	-6450	1913	567
Net (YTD)	-236071	374145	575086

Policy rates	Sep 7	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	**Sep 7**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.05	4.75	5.10	5.35
10 Yr Gilt(%)^	6.96	6.95	6.77	6.98
TREP (%)	4.50	4.75	5.00	5.21
Short-term debt	**Sep 7**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	6.70	7.03	6.95	7.75
6-month CPs (%)	6.88	7.25	7.22	7.85
3-month CDs (%)	5.86	6.39	6.55	7.10
6-month CDs (%)	6.39	6.73	6.75	7.50
182-day T-bill (%)^	5.59	5.63	5.52	5.65
364-day T-bill (%)^	5.87	5.80	5.66	5.93
Long-term debt	**Sep 7**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.29	6.35	6.18	6.35
5-Y G-sec (%)	6.62	6.59	6.35	6.65
10-Y G-sec (%)	6.96	6.95	6.77	6.98

^Weighted average yield

Indian Equity

- Indian equity benchmark indices closed lower on Monday, dragged down by losses in information technology stocks, as stronger-than-expected US jobs data increased expectations of a rate hike by the US Federal Reserve (Fed) in September. Elevated crude oil prices and tensions in West Asia further weighed on sentiment.
- The top losers were Infosys, HDFC Life Insurance Company, SBI Life Insurance Company, Jio Financial Services and Tech Mahindra, down 2.06-3.76%.
- The top gainers were Apollo Hospitals Enterprise, Larsen & Toubro, Coal India, Bharti Airtel and Max Healthcare Institute, up 0.73-1.27%.

Indian Debt

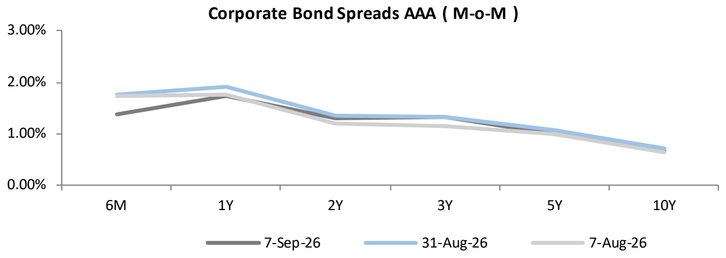
- The interbank call-money rate ended higher at 5.05% on Monday compared to 5.00% on Friday.
- Government bond prices ended flat on Monday as the RBI's preference for temporary liquidity absorption measures supported sentiment, while rising oil prices capped gains.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended flat at 6.96% on Monday.

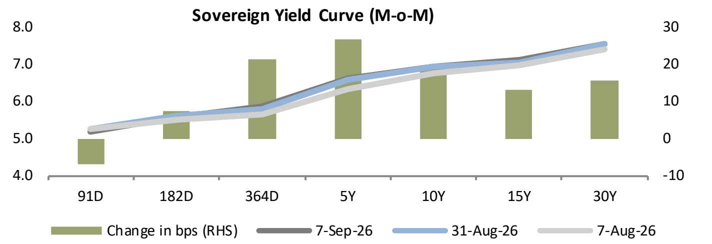
Economy and Government

- Asian Development Bank will support renewable energy projects in Madhya Pradesh, with the partnership intended to attract private investment in clean-energy infrastructure.
- According to US officials, India and the US are moving beyond cooperation toward deeper engagement in the space sector.
- Government of India plans to invite applications under the Rs 37,500 crore coal gasification scheme to promote cleaner coal utilisation and reduce import dependence.
- Government of India is considering FDI liberalisation in the plantation sector by bringing more crops under its ambit.
- Uttar Pradesh Government plans to develop the Braj region on the lines of Ayodhya and Kashi to boost tourism and infrastructure.
- Reserve Bank of India absorbed more than Rs 6 trillion through liquidity-withdrawal operations, after banking-system liquidity reached a record high the previous day.
- SEBI eased compliance requirements for Foreign Portfolio Investors (FPIs) that invest exclusively in Indian government securities, aiming to facilitate greater foreign participation in the sovereign debt market.
- Central Board of Indirect Taxes and Customs issued a standardized checklist for customs officers to follow before clearing imports of cosmetics, drugs and medical devices.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.87	7.46	8.18	8.26	9.49
3-Yr	6.29	7.67	8.39	8.47	9.70
5-Yr	6.62	7.70	8.52	8.60	9.83
10-Yr	6.96	7.74	8.56	8.64	9.87

* Weighted average yields





Global Indices	Sep 7	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	10822	-0.08	4.38	17.53
DAX	26007	-0.15	5.04	10.21
Nikkei 225	66400	2.12	-0.28	54.35
Hang Seng	25413	-0.93	1.81	-0.02
KOSPI	6995	4.61	-14.28	118.26

Global 10 yr Sov. Yields (%)	Sep 7	1D Ago	3M Ago	1Y Ago
US	NA	4.78	4.55	4.10
UK	5.18	5.13	4.88	4.66
German	3.38	3.34	3.04	2.66
Japan	2.91	2.91	2.67	1.57

Commodity Prices	Sep 7	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	97.00	96.28	93.09	65.5
NYMEX Crude Oil ($/bbl)	NA	91.48	90.54	61.87
Gold (Rs / 10 gm)#	152703	154884	154238	106338

ibjarates spot prices

Currencies Vs INR	Sep 7	1D Ago	M Ago	3M Ago
USD	94.45	94.49	95.21	95.40
GBP	127.68	127.97	128.12	128.11
Euro	109.67	109.88	109.72	110.83
100 Yen	60.62	60.52	60.14	59.64
Forex Reserve ($ bn)*	740.80	729.33	692.87	682.32

* Data pertains to Aug 28 and Aug 21 respectively Source: CRISIL

Key Macro Indicators	
CPI	4.45% (Jul-2026)
WPI	9.78% (Jul'-2026)
IIP	6.70% (Jul' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'27)

Capital Market

- Lickicious raised Rs 19 crore through equity and institutional debt in a funding round led by Prath Ventures to expand its business.
- Axis Bank introduced 'Arise Homecoming', a talent acquisition program focused on attracting foreign-educated Indian professionals to join its workforce.
- RBL Bank approved a $1 billion Euro Medium Term Note (EMTN) Programme to raise overseas debt and diversify its funding sources.
- Pixxel raised fresh capital in a Series C funding round led by investors including Temasek and Seraphim Space.
- BVG India received SEBI approval to raise Rs 300 crore through an IPO.

Global Equity

- FTSE index closed marginally lower on Monday due to rising crude oil prices and stronger US data fueling inflation and rate hike concerns, outweighing gains in energy stocks.
- Asian markets were trading mixed at 8.30 AM.

International

- The Eurozone economy expanded 1.2% year-on-year in Q2 2026, compared to 0.6% growth recorded in Q1 2026.
- Eurozone employment grew 0.5% year on year in the second quarter of 2026, unchanged from the previous quarter.
- UK House Price Index fell 0.4% year on year in August 2026, compared to a 0.1% rise in July 2026.
- The Japanese economy grew 1.4% in Q2 2026, moderating from 1.8% growth in Q1 2026, indicating a slowdown in economic momentum amid weaker domestic demand and external uncertainties.
- Japan's current account surplus widened to JPY 2.99 trillion in July 2026 from JPY 2.59 trillion a year earlier driven by a higher primary income surplus and narrower services and secondary income deficits.
- Japan coincident economic index rose to 120.6 in July 2025 compared to 118.9 in June while the leading economic index increased to 117.9 in July 2026 compared to a 116.2 in June.

Upcoming market indicators

- US Consumer Inflation Expectations, Aug (Sep 8)
- China Inflation Rate, Aug (Sep 9)
- China PPI, Aug (Sep 9)
- UK RICS House Price Balance, Aug (Sep 10)
- Eurozone ECB Interest Rate Decision (Sep 10)
- US Inflation Rate, Aug (Sep 11)
- US CPI, Aug (Sep 11)