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La Creme De La Creme Services LLP

Daily Newsletter

November 17, 2026

Broad Indices	Nov 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82105	0.63	5.25	-2.91	20.88
Nifty 50	25291	0.58	3.80	-2.39	20.60
BSE Mid cap	47024	-0.70	-4.35	-0.35	NA
Nifty Midcap 100	61576	-0.51	3.46	1.38	27.61

Sectoral Indices	Nov 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60642	-1.29	-6.15	-0.13
BSE Bankex	69297	0.71	6.17	5.56
BSE CD	62538	0.90	-4.82	0.39
BSE CG	71663	-1.50	-10.56	1.25
BSE FMCG	17880	1.35	-2.26	-12.47
BSE Healthcare	52580	-0.58	3.15	17.75
BSE IT	30184	-0.25	0.21	-14.77
BSE Metal	39750	-1.75	-4.33	14.38
BSE Oil & Gas	26557	0.30	1.08	-8.01
BSE Power	7170	-0.57	-6.19	6.59
BSE Realty	7092	-1.15	1.35	-3.03

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Max Healthcare	6.63	Tata Motors	-8.70
TATA CONSUM	3.57	TATA STEEL	-2.37
ITC	3.54	MARUTI	-2.20
Apollo Hospitals	2.87	HINDALCO	-2.15
Nestle India	2.68	Coal India	-1.49

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Nov 13	MF Inv Nov 4	DII Inv Nov 16
Buy	18572	12935	11752
Sell	13007	15157	15271
Net	5565	-2222	-3519
Net (YTD)	-203026	459125	641515

Policy rates	Nov 16	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	5.50	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00
Overnight rates	**Nov 16**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.60	5.50	5.74	5.25
10 Yr Gilt(%)^	7.31	7.17	7.37	6.76
TREP (%)	5.15	5.00	5.85	5.15
Short-term debt	**Nov 16**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	7.88	7.85	7.45	6.80
6-month CPs (%)	8.25	8.10	7.85	7.08
3-month CDs (%)	7.24	7.35	7.00	6.40
6-month CDs (%)	7.78	7.55	7.48	6.68
182-day T-bill (%)^	6.49	6.31	6.38	5.53
364-day T-bill (%)^	6.56	6.47	6.51	5.67
Long-term debt	**Nov 16**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.88	6.86	6.88	6.17
5-Y G-sec (%)	7.14	6.95	7.27	6.36
10-Y G-sec (%)	7.31	7.17	7.37	6.76

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Monday, supported by increased foreign portfolio investor buying and expectations of lower oil prices.
- The top gainers were Max Healthcare Institute, Tata Consumer Products, ITC, Apollo Hospitals Enterprise and Nestle India, up 2.68-6.63%.
- The top losers were Tata Motors Passenger, Tata Steel, Maruti Suzuki India, Hindalco Industries and Coal India, down 1.49-8.70%.

Indian Debt

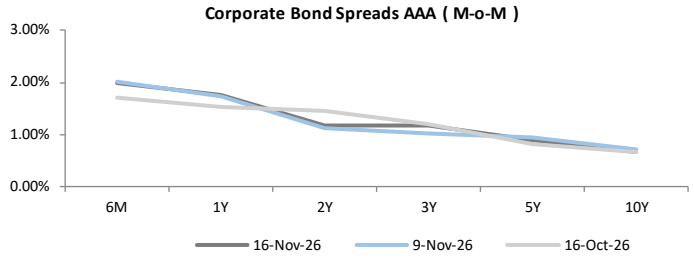
- The interbank call-money rate ended flat at 5.60% on Monday.
- Government bond prices ended lower on Monday due to rising inflation concerns and gains in US treasury yield.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.32% on Monday compared to 7.31% on Friday.

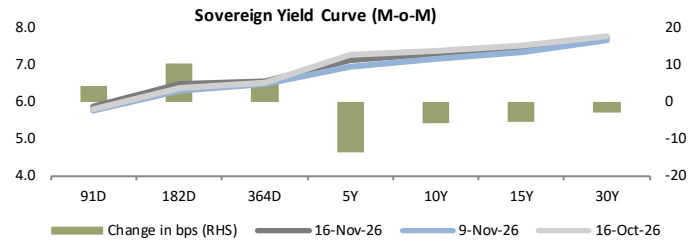
Economy and Government

- India's wholesale prices climbed 12.29% year-on-year in October 2026, compared to a 11.39% rise in September 2026.
- India's unemployment rate eases to 4.9% in October from 5% in September.
- Chief Economic Adviser V. Anantha Nageswaran said India stands to benefit from the unwinding of the global AI trade, potentially attracting greater investment and supporting broader economic growth.
- India signed the US-led Pax Silica Declaration, aimed at strengthening cooperation and securing supply chains for AI-related technologies and critical inputs.
- The Securities and Exchange Board of India (Sebi) has constituted a sub-group of its Primary Market Advisory Committee (PMAC) to review provisions governing initial public offerings (IPOs), follow-on public offers (FPOs), preferential issues and qualified institutional placements (QIPs).
- SEBI data showed Commitments to alternative investment funds (AIFs) rose to Rs 18.68 trillion at the end of September 2026, up 6.6% from the previous quarter and 24.1% from a year earlier.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.52	8.23	8.95	9.03	10.26
3-Yr	6.88	8.17	8.89	8.97	10.20
5-Yr	7.14	8.17	8.99	9.07	10.30
10-Yr	7.31	8.11	8.93	9.01	10.24

* Weighted average yields





Global Indices	Nov 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	51608	-1.41	-3.95	9.46
Nasdaq	24510	-2.49	-8.30	7.03
FTSE 100	10882	-0.19	1.22	12.20
DAX	26599	-0.57	0.60	11.40
Nikkei 225	59662	-2.42	-13.17	18.43
Hang Seng	23754	0.49	-5.43	-10.61
KOSPI	5101	-3.59	-26.91	27.14

Global 10 yr Sov. Yields (%)	Nov 16	1D Ago	3M Ago	1Y Ago
US	5.12	5.15	4.68	4.14
UK	5.36	5.34	5.04	4.58
German	3.38	3.38	3.20	2.72
Japan	2.89	2.87	2.88	1.70

Commodity Prices	Nov 16	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	92.44	95.84	88.52	64.29
NYMEX Crude Oil ($/bbl)	85.72	88.56	82.4	59.95
Gold (Rs / 10 gm)#	134971	135809	152363	124794

ibjarates spot prices

Currencies Vs INR	Nov 16	1D Ago	M Ago	3M Ago
USD	94.12	94.20	95.02	95.43
GBP	124.34	124.61	126.41	128.83
Euro	103.73	104.18	106.70	110.13
100 Yen	59.04	58.94	60.18	59.93
Forex Reserve ($ bn)*	719.55	717.06	726.03	707.00

* Data pertains to Nov 6 and Oct 30 respectively Source: CRISIL

Key Macro Indicators	
CPI	6.09% (Oct'-2026)
WPI	11.39% (Sep'-2026)
IIP	6.70% (Sep'-2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

Capital Market

- BSE's BANKEX received approval from the US Commodity Futures Trading Commission (CFTC) for offer and sale in the US.
- Urban Company launched a qualified institutional placement (QIP) to raise Rs 2,500 crore in fresh capital.
- fintech Olyv raised $6 million from Nippon Life India AIF (alternative investment fund) Management, along with existing investors with the latest capital raise expanding its Series B funding to a total of $30 million.
- Hindustan Zinc Ltd will invest approximately Rs 80,000 crore (about $8.5 billion) over the next three to five years to increase its metal production capacity
- Coal India will use the proceeds from the proposed Rs 8,981 crore initial public offering (IPO) of its subsidiary Mahanadi Coalfields (MCL) to fund its diversification plans.

Global Equity

- Wall Street stocks declined on Monday due to continued weakness in technology stocks, particularly semiconductor shares, following uncertainty around Nvidia.
- US 10yr yield ended lower at 5.12% as investors sought the safety of government bonds amid the equity market sell-off, although persistent inflation concerns and expectations of further Federal Reserve rate hikes limited the decline.
- FTSE index fell marginally on Monday as losses in mining stocks amid weaker industrial metal prices offset gains in consumer staples, while investors awaited key UK employment and inflation data.
- Asian markets were trading lower at 8.30 AM.

International

- US NY Empire State Manufacturing Index fell to 7.8 in November 2026 from 25.5 in October which was the highest reading since December 2021.
- Eurozone Industrial Production decreased 1.50% in September of 2026 compared to fall of 1.1% in August.
- Japan Industrial Production increased 1.7% in September 2026 compared to 2.7% rise in August 2026. months of the year.

Upcoming market indicators

- India Unemployment Rate, Oct (Nov 16)
- India WPI Inflation, Oct (Nov 16)
- India WPI Manufacturing, Oct (Nov 16)

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