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La Creme De La Creme Services LLP

Daily Newsletter

November 27, 2026

Broad Indices	Nov 26	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84329	0.46	8.85	-1.50	21.44
Nifty 50	25885	0.25	6.93	-1.22	21.08
BSE Mid cap	47059	0.34	-4.86	-0.37	NA
Nifty Midcap 100	61782	0.32	3.81	1.18	27.70

Sectoral Indices	Nov 26	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62836	-0.66	-2.13	1.99
BSE Bankex	71635	0.00	9.52	7.25
BSE CD	61143	-1.34	-6.14	-1.59
BSE CG	70448	0.60	-10.93	1.09
BSE FMCG	18542	-0.65	3.37	-8.94
BSE Healthcare	54099	0.31	5.84	20.77
BSE IT	31409	3.41	7.63	-13.38
BSE Metal	37386	1.15	-13.33	9.75
BSE Oil & Gas	26689	0.08	1.94	-7.08
BSE Power	7072	0.71	-5.90	6.10
BSE Realty	7601	3.33	6.71	7.32

Nifty			
Top Out performers	% Change	Top Under performers	% Change
HCLTECH	6.42	Asian Paints	-2.98
BSE	5.70	Bajaj Finance	-2.96
TCS	4.89	Shriram Fin	-2.84
Infosys	4.69	Nestle India	-2.81
Tech Mahindra	2.97	Bajaj Finserv	-2.03

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Nov 25	MF Inv Nov 20	DII Inv Nov 26
Buy	23574	14576	24353
Sell	20593	18843	18722
Net	2981	-4267	5631
Net (YTD)	-147574	427703	639225

Policy rates	Nov 26	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 26**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.75	5.70	5.75	5.20
10 Yr Gilt(%)^	7.24	7.26	7.48	6.85
TREP (%)	5.30	5.76	5.76	5.07
Short-term debt	**Nov 26**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	8.15	7.95	7.95	7.15
6-month CPs (%)	8.60	8.30	8.30	7.30
3-month CDs (%)	7.60	7.33	7.50	6.48
6-month CDs (%)	8.00	7.85	7.90	6.80
182-day T-bill (%)^	6.47	6.50	6.25	5.58
364-day T-bill (%)^	6.59	6.56	6.43	5.73
Long-term debt	**Nov 26**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.89	6.90	7.00	6.27
5-Y G-sec (%)	7.10	7.13	7.41	6.46
10-Y G-sec (%)	7.24	7.26	7.48	6.85

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Thursday, driven by continued foreign fund inflows and resilience to proposed US tariffs, while improving earnings expectations further boosted sentiment.
- The top gainers were HCL Technology, BSE, TCS, Infosys and Tech Mahindra, up 2.97-6.42%.
- The top losers were Asian Paints, Bajaj Finance, Shriram Finance, Nestlé India and Bajaj Finserv, down 2.03-2.98%.

Indian Debt

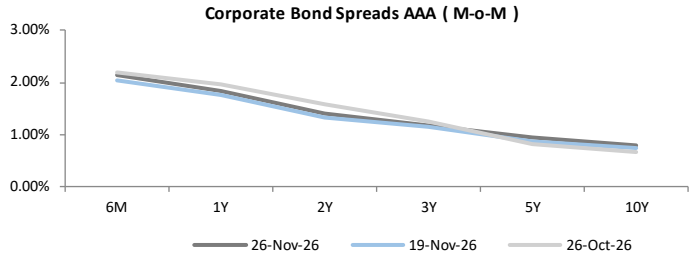
- The interbank call-money rate ended higher at 5.75% on Thursday compared to 5.60% on Wednesday.
- Government bond prices ended lower on Thursday as rising crude oil prices and concerns over further RBI rate hikes weighed on sentiment, following comments in the RBI's monthly bulletin highlighting broad-based inflationary pressures.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended higher at 7.24% on Thursday compared to 7.16% on Wednesday.

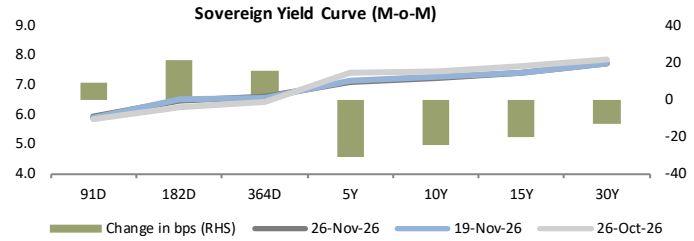
Economy and Government

- United States administration under Donald Trump proposed a tariff of up to 25% on imports from India, citing excess industrial capacity. The proposed rate could be reduced to 17% if both countries conclude a trade agreement.
- Union Minister Nitin Gadkari unveiled a Rs 1 lakh crore road development plan for West Bengal, stating that funding constraints would not be a hurdle for infrastructure expansion.
- The government's coal gasification incentive scheme attracted only two bids in its third round, indicating limited industry participation.
- Odisha approved 19 projects worth Rs 3,810 crore, led by investments in the power and tourism sectors, aimed at boosting industrial development and employment in the state.
- The Reserve Bank of India (RBI) accepted Rs 8,003 crore of state development loans in its first-ever bond switch auction, aimed at improving state debt management and easing repayment pressures.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.62	8.37	9.09	9.17	10.40
3-Yr	6.89	8.19	8.91	8.99	10.22
5-Yr	7.10	8.17	8.99	9.07	10.30
10-Yr	7.24	8.15	8.97	9.05	10.28

* Weighted average yields





Global Indices	Nov 26	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	10609	1.75	-2.47	9.47
DAX	25216	2.08	-4.07	6.28
Nikkei 225	57499	0.86	-13.22	16.02
Hang Seng	22227	1.19	-13.36	-14.27
KOSPI	4711	0.29	-30.80	18.94

Global 10 yr Sov. Yields (%)	Nov 26	1D Ago	3M Ago	1Y Ago
US	NA	4.85	4.66	4.00
UK	5.15	5.14	5.04	4.42
German	3.26	3.22	3.23	2.67
Japan	2.64	2.63	2.89	1.80

Commodity Prices	Nov 26	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	96.57	94.61	87.84	63.13
NYMEX Crude Oil ($/bbl)	NA	83.68	82.23	58.65
Gold (Rs / 10 gm)#	122641	121038	161337	126081

ibjarates spot prices

Currencies Vs INR	Nov 26	1D Ago	M Ago	3M Ago
USD	92.48	92.49	95.15	95.71
GBP	121.15	120.97	127.23	130.42
Euro	101.39	101.13	106.72	111.57
100 Yen	58.08	58.00	60.57	60.07
Forex Reserve ($ bn)*	705.34	719.55	721.02	716.91

* Data pertains to Nov 13 and Nov 6 respectively Source: CRISIL

Key Macro Indicators	
CPI	6.09% (Oct'-2026)
WPI	12.29% (Oct'-2026)
IIP	6.70% (Sep' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

Capital Market

- Bharti Airtel signed an agreement with the Assam Government to invest around Rs 1,200 crore in establishing three data centres in the state, including a Rs 700 crore facility in Guwahati and additional investments of Rs 500 crore across projects in Jorhat and Silchar.
- Ultraviolette commenced construction of a Rs 779 crore electric vehicle manufacturing facility in Hosur, aimed at expanding production capacity and supporting future growth in the EV market.
- Juniper Green Gem signed a Power Purchase Agreement (PPA) with NTPC for a 150 MW wind-solar hybrid power project, which is expected to generate annual revenue of around Rs 155 crore.
- KSB received an order worth Rs 117 crore from Triveni Turbines for the supply of 15 sets of boiler feed pumps and accessories for JSW Energy's Salboni Supercritical Power Plant project, strengthening its industrial and power-sector order book.
- Purvah Green Power issued a Letter of Award (LoA) to Venwind Refex Power for the supply of wind turbine generators and tubular towers, along with the execution of a 153.7 MW wind power project in Madhya Pradesh, expanding its renewable energy portfolio.

Global Equity

- FTSE index closed higher on Thursday, supported by gains in banking, mining, and industrial stocks, while takeover interest in consumer stocks further boosted investor sentiment.
- Asian markets were trading higher at 8.30 AM.

International

- China's industrial profits rose 16.0% year-on-year to CNY 6.74 trillion in the first ten months of 2026, compared to 15.5% growth in January-September 2026.
- Japan's coincident economic index increased to 119.5 in September 2026, compared to 118.8 in August 2026.
- Japan's leading economic index, edged upward to 116.5 in September 2026 compared to 118.0 in August 2026.

Upcoming market indicators

- Eurozone Consumer Inflation Expectations, Nov (Nov 27)
- Eurozone Industrial Sentiment, Nov (Nov 27)
- Japan Retail Sales, Oct (Nov 28)
- India Government Budget Value, Oct (Nov 30)
- India Industrial Production, Oct (Nov 30)
- India Manufacturing Production, Oct (Nov 30)
- India GDP Growth Rate YoY Q3 (Nov 30)

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