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La Creme De La Creme Services LLP

Daily Newsletter

September 07, 2026

Broad Indices	Sep 4	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76515	0.48	2.90	-5.21	20.27
Nifty 50	23898	0.10	2.05	-3.38	20.20
BSE Mid cap	48746	-0.02	5.23	7.12	NA
Nifty Midcap 100	63079	-0.25	5.98	10.74	30.40

Sectoral Indices	Sep 4	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61406	-0.18	6.57	5.64
BSE Bankex	64904	0.25	5.99	7.31
BSE CD	63244	0.04	8.31	1.45
BSE CG	77869	-0.66	-2.85	16.18
BSE FMCG	17470	0.01	-2.35	-16.79
BSE Healthcare	50913	-0.50	9.04	15.07
BSE IT	29401	-0.12	3.31	-14.73
BSE Metal	42294	1.42	-3.71	32.43
BSE Oil & Gas	26170	0.04	-1.88	1.19
BSE Power	7476	-0.07	-8.01	14.33
BSE Realty	7093	-0.66	18.99	3.47

Nifty			
Top Out performers	% Change	Top Under performers	% Change
SBI Life	3.50	HCL Tech	-1.94
Tata Steel	2.49	Bharti Airtel	-1.55
HDFC Life	2.42	MARUTI	-1.27
RIL	1.50	Bajaj Finserv	-1.11
TRENT	1.33	Max Health	-1.02

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 3	MF Inv Sep 2	DII Inv Sep 4
Buy	13720	13325	19254
Sell	16541	11413	10324
Net	-2821	1913	8930
Net (YTD)	-229621	374145	574520

Policy rates	Sep 4	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 4**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.00	5.25	4.60	5.20
10 Yr Gilt(%)^	6.96	6.91	6.82	7.00
TREP (%)	3.48	4.40	4.90	5.00
Short-term debt	**Sep 4**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	6.65	7.05	7.15	8.00
6-month CPs (%)	6.98	7.27	7.28	8.10
3-month CDs (%)	5.80	6.40	6.75	7.23
6-month CDs (%)	6.43	6.76	6.80	7.65
182-day T-bill (%)^	5.60	5.63	5.56	5.69
364-day T-bill (%)^	5.88	5.79	5.70	5.97
Long-term debt	**Sep 4**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.27	6.29	6.23	6.48
5-Y G-sec (%)	6.63	6.54	6.41	6.81
10-Y G-sec (%)	6.96	6.91	6.82	7.00

^Weighted average yield

Indian Equity

- Indian equity benchmark indices closed higher on Friday, driven by gains in financial and metal stocks amid positive global cues.
- The top gainers were SBI Life Insurance, Tata Steel, HDFC Life, Reliance and Trent, up 1.33-3.50%.
- The top losers were HCL Technologies, Bharti Airtel, Maruti Suzuki, Bajaj Finserv and Max Healthcare, down 1.02-1.94%.

Indian Debt

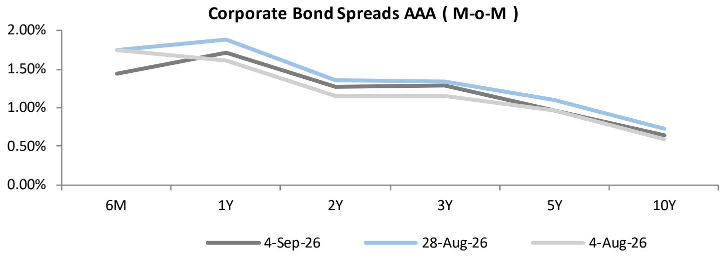
- The interbank call-money rate ended lower at 5.00% on Friday compared to 5.05% on Thursday.
- Government bond prices ended marginally higher on Friday as support from ample domestic liquidity was offset by elevated oil prices and growing expectations of global rate hikes.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 6.96% on Friday compared to 6.97% on Thursday.

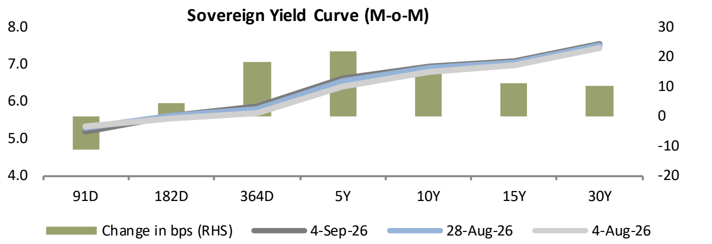
Economy and Government

- India's foreign exchange reserves increased by $11.47 billion to $740.80 billion in the week ended August 28, 2026, from $729.33 billion in the previous week, further strengthening the country's external sector position and import cover.
- India plans to make battery energy storage systems (BESS) mandatory for all new government-backed solar and wind projects from July 2027, aiming to improve grid stability and renewable energy integration.
- West Bengal launched a Rs 25 crore film and media infrastructure project in New Town, with the foundation stone laid for the Uttam Kumar Film Centre to support the state's film and entertainment industry.
- The Central Electricity Authority (CEA) has proposed mandatory installation of energy storage systems for all ground-mounted solar power and wind power projects to be commissioned after July 2027.
- SEBI and the European Securities and Markets Authority (ESMA) have entered into a cooperation arrangement on Central Counterparties (CCPs), aimed at strengthening regulatory coordination, information sharing and cross-border oversight of clearing infrastructure between India and the European Union.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.84	7.46	8.18	8.26	9.49
3-Yr	6.27	7.67	8.39	8.47	9.70
5-Yr	6.63	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 4	1D % Chg	3M % Chg	1Y % Chg
DJIA	53414	-0.51	3.59	17.08
Nasdaq	26507	-0.29	-1.21	22.11
FTSE 100	10831	0.00	4.54	17.51
DAX	26046	0.17	4.42	9.58
Nikkei 225	65021	1.26	-3.63	52.70
Hang Seng	25651	1.74	1.57	2.36
KOSPI	6687	1.64	-22.60	108.92

Global 10 yr Sov. Yields (%)	Sep 4	1D Ago	3M Ago	1Y Ago
US	4.78	4.77	4.47	4.17
UK	5.13	5.15	4.89	4.71
German	3.34	3.35	3.02	2.72
Japan	2.91	2.95	2.67	1.60

Commodity Prices	Sep 4	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	96.28	95.52	95.03	66.99
NYMEX Crude Oil ($/bbl)	91.48	91.3	93.04	63.48
Gold (Rs / 10 gm)#	154884	153941	156086	105945

ibjarates spot prices

Currencies Vs INR	Sep 4	1D Ago	M Ago	3M Ago
USD	94.49	94.47	95.35	95.74
GBP	127.97	127.42	128.02	128.60
Euro	109.88	109.61	109.72	111.19
100 Yen	60.52	60.07	60.47	59.89
Forex Reserve ($ bn)*	740.80	729.33	682.35	681.38

* 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

- Anthropic is finalizing a $15 billion credit facility ahead of its planned IPO, strengthening its financial position to support AI infrastructure and growth initiatives.
- Prime Focus approved a proposal to raise up to Rs 3,000 crore through the issuance of equity shares, debt securities, or other eligible instruments to support its growth and business expansion plans.
- Comet raised Rs 100 crore in a Series B funding round led by Verlinvest, to support expansion, brand building and product development.
- Moustache Escapes has appointed PwC to raise Rs 30-35 crore from family offices and high-net-worth investors to support its expansion plans in the hospitality sector.

Global Equity

- Wall Street stocks closed lower on Friday as stronger-than-expected non-farm payroll data for August raised expectations for a Federal Reserve rate hike.
- 10-year US bond yield ended higher at 4.78% with investors waiting for fresh economic data to be released during the week.
- FTSE index closed flat on Friday as gains in select energy and defensive stocks offset pressure from mounting government debt and inflation concerns and renewed expectations of a September Fed rate hike following stronger-than-expected US jobs data.
- Asian markets were trading higher at 8.30 AM.

International

- US non-farm payrolls increased by 162,000 jobs in August 2026, compared with an upwardly revised gain of 23,000 jobs (from 21,000 jobs earlier) in July 2026.
- US unemployment rate remained unchanged at 4.1% in August 2026 compared with the previous month.
- Eurozone S&P Global Construction PMI fell to 43.0 in August 2026 compared to 44.3 in July 2026.
- Eurozone retail sales slowed to 0.6% in July 2026 compared to a revised 1.4% in June 2026.
- UK S&P Global Construction PMI eased to 44.3 in August 2026 compared to 44.7 in the previous month.

Upcoming market indicators

- Eurozone GDP Growth Rate QoQ 3rd Est Q2 (Sep 7)
- Eurozone Employment Change YoY Final Q2 (Sep 7)
- US Consumer Inflation Expectations, Aug (Sep 8)
- Japan GDP Growth Rate QoQ Final Q2 (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)