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La Creme De La Creme Services LLP

Daily Newsletter

November 05, 2026

Broad Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77301	0.50	-1.44	-7.38	19.77
Nifty 50	23961	0.63	-2.66	-6.40	19.77
BSE Mid cap	45530	1.36	-6.85	-3.57	NA
Nifty Midcap 100	59506	1.55	-0.02	-0.89	26.84

Sectoral Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58156	1.09	-8.71	-2.24
BSE Bankex	62873	0.71	-3.75	-3.33
BSE CD	59079	2.15	-9.57	-2.34
BSE CG	72931	3.60	-6.70	3.62
BSE FMCG	17363	1.39	-5.74	-15.31
BSE Healthcare	51091	1.02	0.59	13.97
BSE IT	30303	-1.21	0.51	-12.42
BSE Metal	39859	2.48	-4.53	14.66
BSE Oil & Gas	26162	1.92	-1.06	-9.15
BSE Power	7166	2.64	-6.73	4.51
BSE Realty	6750	2.83	-3.01	-9.57

Nifty			
Top Out performers	% Change	Top Under performers	% Change
BEL	4.71	TCS	-2.52
Adani Enterp	4.47	HCL Tech	-2.37
TITAN	4.22	BSE	-1.75
Jio Financial	3.73	Infosys	-1.73
Max Health	3.53	ETERNAL	-1.42

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Nov 3	MF Inv Oct 30	DII Inv Nov 4
Buy	16835	727	16393
Sell	13483	805	20105
Net	3352	-78	-3712
Net (YTD)	-285072	464141	686339

Policy rates	Nov 4	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	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	**Nov 4**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.60	5.70	5.20	4.60
10 Yr Gilt(%)^	7.19	7.44	7.20	6.82
TREP (%)	5.61	5.26	5.04	4.90
Short-term debt	**Nov 4**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	8.02	8.02	7.00	7.15
6-month CPs (%)	8.35	8.30	7.60	7.28
3-month CDs (%)	7.52	7.58	6.10	6.75
6-month CDs (%)	7.85	7.90	7.16	6.80
182-day T-bill (%)^	6.41	6.56	5.94	5.56
364-day T-bill (%)^	6.60	6.62	6.11	5.70
Long-term debt	**Nov 4**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.97	7.03	6.74	6.23
5-Y G-sec (%)	7.12	7.39	7.03	6.41
10-Y G-sec (%)	7.19	7.44	7.20	6.82

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Wednesday on optimism over foreign fund inflows and investors closely monitored post-elections signals and its potential impact on policies in the US.
- The top gainers were Bharat Electronics, Adani Enterprises, Titan Company, Jio Financial Services and Max Healthcare Institute—up 3.53-4.71%.
- The top losers were Tata Consultancy Services, HCL Technologies, BSE, Infosys and Eternal—down 1.42-2.52%.

Indian Debt

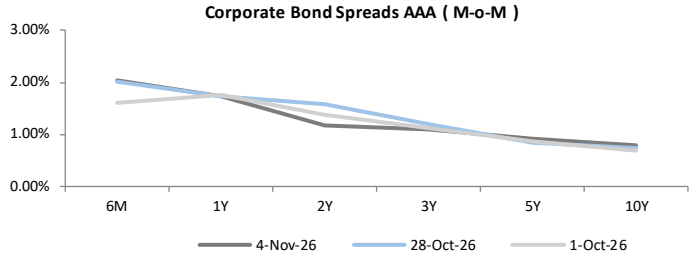
- The interbank call-money rate ended lower at 5.60% on Wednesday compared to 5.65% on Tuesday.
- Government bond prices ended higher on Wednesday as hopes of a Middle East peace deal eased crude oil prices, reducing inflation concerns.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.19% on Wednesday compared to 7.30% on Tuesday..

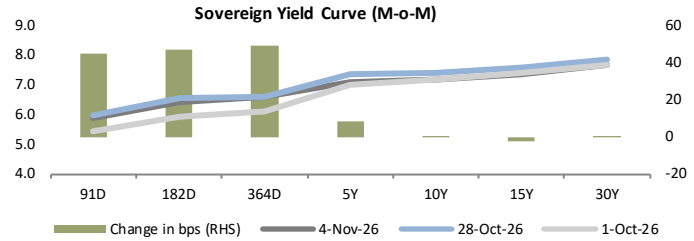
Economy and Government

- India's HSBC Composite PMI rose to 56.2 in October 2026 compared to 55.9 in September, while the Services PMI edged higher to 55.8 from 55.2.
- Commerce and Industry Minister Piyush Goyal held talks with Denmark's Minister for Business and Competitiveness to strengthen bilateral trade, investment, and industrial cooperation, with a focus on renewable energy and green technologies.
- The Ministry of Coal, Ministry of Power, and Indian Railways have jointly directed a significant increase in coal inventories at power plants to at least 55 million tonnes by March 2027, from around 18 million tonnes currently, to ensure adequate fuel availability and energy security.
- The Ministry of Electronics and Information Technology launched three indigenous AI models under the IndiaAI Mission, aimed at enabling offline mobile AI access and secure deployment across critical sectors including defence, cybersecurity, banking, and finance.
- The Union Cabinet approved a Rs 14,500 crore viability gap funding (VGF) scheme to support the creation of 92 GWh of energy storage capacity, boosting grid stability and renewable energy integration.
- National Payments Corporation of India (NPCI) launched a dedicated technology arm focused on AI and blockchain.
- The Central Government proposed stricter microbial contamination norms under Schedule M, aimed at strengthening pharmaceutical manufacturing quality standards.
- The Reserve Bank of India (RBI) constituted a technical consultative committee to review issues related to the money, government securities, foreign exchange, and derivatives markets.
- SEBI eased digital KYC requirements for NRIs and foreign nationals, with the revised framework set to take effect from December 3, 2026.
- The Pension Fund Regulatory and Development Authority (PFRDA) aims to expand the National Pension System (NPS) through greater bank participation and UPI integration, targeting a corpus of around Rs 100 lakh crore by 2040.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.51	8.23	8.95	9.03	10.26
3-Yr	6.97	8.26	8.98	9.06	10.29
5-Yr	7.12	8.20	9.02	9.10	10.33
10-Yr	7.21	8.15	8.97	9.05	10.28

* Weighted average yields





Global Indices	Nov 4	1D % Chg	3M % Chg	1Y % Chg
DJIA	53356	3.03	-1.35	13.32
Nasdaq	25737	1.44	-3.19	10.23
FTSE 100	10829	1.79	-0.46	11.47
DAX	26438	2.22	0.90	10.39
Nikkei 225	62189	-1.42	-2.77	20.76
Hang Seng	23920	1.67	-7.48	-7.83
KOSPI	5684	0.62	-10.62	37.90

Global 10 yr Sov. Yields (%)	Nov 4	1D Ago	3M Ago	1Y Ago
US	4.9	4.95	4.63	4.10
UK	5.14	5.25	4.90	4.42
German	3.29	3.31	3.12	2.65
Japan	2.82	2.78	2.85	1.67

Commodity Prices	Nov 4	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	94.62	103.6	79.36	64.44
NYMEX Crude Oil ($/bbl)	88.12	96.09	75.77	60.56
Gold (Rs / 10 gm)#	141622	137576	142866	120419

ibjarates spot prices

Currencies Vs INR	Nov 4	1D Ago	M Ago	3M Ago
USD	94.84	94.86	95.99	95.35
GBP	127.65	127.21	127.22	128.02
Euro	106.53	106.14	108.62	109.72
100 Yen	59.99	60.09	60.67	60.47
Forex Reserve ($ bn)*	719.75	721.02	765.90	682.35

* Data pertains to Oct 23 and Oct 16 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.54% (Sep'-2026)
WPI	11.39% (Sep'-2026)
IIP	6.70% (Sep' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

Capital Market

- EloElo Group raised $80 million in a Series C funding round led by Hornbill Capital and NBCUniversal, to scale its AI-driven entertainment ecosystem and accelerate growth.
- Peppermint Robotics raised Rs 100 crore in a funding round led by pi Ventures and Crane Venture Partners, to expand its autonomous robotics business across global markets.
- Nooks raised $500 million in funding to support business expansion and product development.
- Bharat Heavy Electricals Limited (BHEL) secured orders worth around Rs 28,000 crore from Adani Power for four 2x800 MW thermal power projects.
- The Competition Commission of India (CCI) approved KKR's proposed Rs 6,000 crore investment in Gentari Renewables India, the renewable energy platform backed by PETRONAS.

Global Equity

- Wall Street stocks closed higher on Wednesday as US midterm elections results reduced political uncertainty and boosted risk appetite, despite concerns over tighter AI regulation.
- 10-year US bond yield ended lower at 4.90%, after the US midterm elections, as expectations of reduced fiscal spending and easing inflation pressures from lower oil prices.
- FTSE index closed higher on Wednesday, supported by gains in banking and precious metal mining stocks, as a weaker US dollar boosted investor sentiment.
- Asian markets were trading higher at 8.30 AM.

International

- US Trade deficit narrowed slightly to $105 billion in September 2026 from $105.7 billion in August.
- Eurozone inflation accelerated to 4.0% in October from 3.8% in September, while core inflation remained unchanged at 2.5%.
- Eurozone Services PMI was revised down to 51.4 in October from 53.0 in September, and Composite PMI declined to 51.7 from 53.1.
- UK Services PMI rose to 52.8 in October from 52.1 in September, while Composite PMI increased to 52.9 from 52.0.
- Japan's S&P Global Services PMI rose to 51.7 in October 2026 compared to 51.3 in September 2026, while the S&P Global Composite PMI eased to 52.1 from 52.3.

Upcoming market indicators

- Eurozone S&P Global Construction PMI, Oct (Nov 5)
- UK S&P Global Construction PMI, Oct (Nov 5)
- UK BoE Interest Rate Decision (Nov 5)
- US Unemployment Rate, Oct (Nov 6)
- Eurozone Retail Sales, Sep (Nov 6)
- Japan S&P Global Composite/Services PMI Final, Oct (Nov 6)
- US Consumer Inflation Expectations, Oct (Nov 9)
- China Inflation Rate, Oct (Nov 9)
- US CPI, Oct (Nov 10)
- US Inflation Rate, Oct (Nov 10)
- UK GDP Growth Rate YoY Prel Q3 (Nov 12)
- UK Balance of Trade, Sep (Nov 12)
- US PPI, Oct (Nov 13)
- Eurozone GDP Growth Rate YoY 2nd Est Q3 (Nov 13)

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