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La Creme De La Creme Services LLP

Daily Newsletter

November 06, 2026

Broad Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	79310	2.60	0.93	-4.97	20.29
Nifty 50	24537	2.40	-0.36	-4.15	20.25
BSE Mid cap	46394	1.90	-5.51	-1.74	NA
Nifty Midcap 100	60621	1.87	1.85	0.97	27.38

Sectoral Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60558	4.13	-6.21	1.79
BSE Bankex	65045	3.45	-0.44	0.00
BSE CD	60684	2.72	-7.19	0.31
BSE CG	71432	-2.06	-8.47	1.49
BSE FMCG	17490	0.73	-5.18	-14.69
BSE Healthcare	51423	0.65	0.90	14.71
BSE IT	31039	2.43	2.87	-10.29
BSE Metal	40226	0.92	-5.17	15.71
BSE Oil & Gas	26364	0.77	0.09	-8.44
BSE Power	7133	-0.47	-7.27	4.03
BSE Realty	6978	3.37	-0.92	-6.52

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Bajaj Finance	7.65	Apollo Hospitals	-2.66
Shriram Finance	6.08	ONGC	-2.13
M&M	5.59	NTPC	-1.63
MARUTI	5.48	Coal India	-1.34
TMPV	5.46	Adani Ports	-1.33

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Nov 4	MF Inv Oct 30	DII Inv Nov 5
Buy	22315	727	22168
Sell	14484	805	32613
Net	7830	-78	-10445
Net (YTD)	-270189	464141	675895

Policy rates	Nov 5	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 5**	**1W Ago**	**M Ago**	**3M Ago**
Call (%)	5.74	5.58	4.80	4.60
10 Yr Gilt(%)^	7.16	7.39	7.21	6.78
TREP (%)	5.25	5.32	5.00	5.01
Short-term debt	**Nov 5**	**1W Ago**	**M Ago**	**3M Ago**
3-month CPs (%)	7.85	8.02	7.25	7.15
6-month CPs (%)	8.20	8.30	7.60	7.28
3-month CDs (%)	7.43	7.54	6.50	6.75
6-month CDs (%)	7.70	7.85	7.16	6.80
182-day T-bill (%)^	6.35	6.52	5.94	5.54
364-day T-bill (%)^	6.49	6.64	6.12	5.66
Long-term debt	**Nov 5**	**1W Ago**	**M Ago**	**3M Ago**
3-Y G-sec (%)	6.96	7.00	6.75	6.22
5-Y G-sec (%)	6.99	7.35	7.07	6.33
10-Y G-sec (%)	7.16	7.39	7.21	6.78

^Weighted average yield

Indian Equity

- Indian equity benchmark indices ended higher Thursday, supported by a decline in crude oil prices after the US midterm elections and stronger foreign fund inflows, amid a global rotation away from artificial intelligence (AI)-focused trades.
- The top gainers were Bajaj Finance, Shriram Finance, Mahindra & Mahindra, Maruti Suzuki India and Tata Motors Passenger Vehicles, which rose 5.46-7.65%.
- The top losers were Apollo Hospitals Enterprise, Oil and Natural Gas Corporation, NTPC, Coal India and Adani Ports and Special Economic Zone, which fell 1.33-2.66%.

Indian Debt

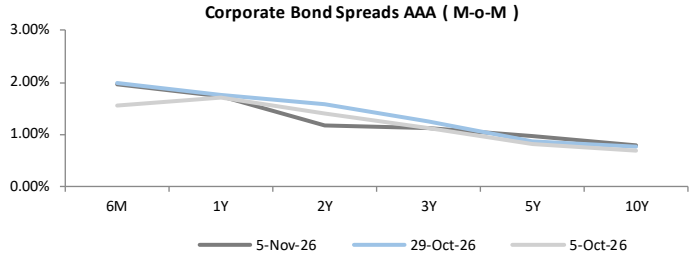
- The interbank call-money rate ended higher at 5.74% on Thursday compared to 5.60% on Wednesday.
- Government bond prices ended higher on Thursday, supported by hopes of a negotiated resolution to the Middle East conflict.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.17% on Thursday compared to 7.19% on Wednesday..

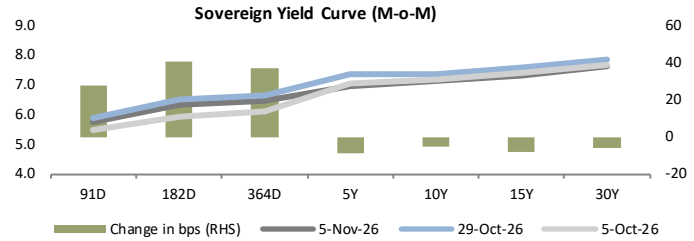
Economy and Government

- External Affairs Minister S. Jaishankar announced a $500 million line of credit for Guyana, covering road, healthcare, and defence projects, alongside agreements on manufacturing, digital payments, and infrastructure cooperation.
- The Ministry of Home Affairs plans to simplify India's visa regime by reducing visa categories from 13 to 9, cutting sub-categories, and streamlining application requirements.
- The Ministry of Power plans to mandate electricity distribution companies to procure energy storage capacity alongside renewable power purchases by March 2027, supporting grid reliability and renewable integration.
- The Ministry of Defence revamped the Agnipath scheme, allowing the 75% of Agniveers not selected for immediate absorption after four years to serve an additional two years, with potential eligibility for regular enrolment in the Indian Army.
- The Central Government issued an advisory to states to strengthen fodder production and livestock infrastructure to support the livestock sector and improve resilience.
- The Centre proposed greater parity in mineral taxation while maintaining states' rights over mineral resources and revenue collection.
- Securities and Exchange Board of India (SEBI) eased investor accreditation norms by allowing fund managers to certify accredited investor status, a move aimed at simplifying the accreditation process and improving access to alternative investment products for eligible investors.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.52	8.15	8.87	8.95	10.18
3-Yr	6.96	8.07	8.79	8.87	10.10
5-Yr	6.99	8.06	8.88	8.96	10.19
10-Yr	7.16	8.05	8.87	8.95	10.18

* Weighted average yields





Global Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	51523	-3.44	-5.20	8.90
Nasdaq	24315	-5.52	-7.77	3.47
FTSE 100	10783	-0.43	-0.97	10.29
DAX	26325	-0.43	0.76	9.46
Nikkei 225	61078	-1.79	-7.88	21.64
Hang Seng	24797	3.67	-4.32	-4.39
KOSPI	5384	-5.28	-18.41	34.45

Global 10 yr Sov. Yields (%)	Nov 5	1D Ago	3M Ago	1Y Ago
US	4.84	4.90	4.63	4.17
UK	5.14	5.14	4.89	4.46
German	3.25	3.29	3.10	2.67
Japan	2.77	2.82	2.81	1.66

Commodity Prices	Nov 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil ($/bbl)	98.29	94.62	79.45	63.52
NYMEX Crude Oil ($/bbl)	90.52	88.12	75.22	59.6
Gold (Rs / 10 gm)#	144129	141622	145625	120419

ibjarates spot prices

Currencies Vs INR	Nov 5	1D Ago	M Ago	3M Ago
USD	94.40	94.84	96.28	95.12
GBP	127.37	127.65	127.22	127.99
Euro	106.33	106.53	107.79	109.72
100 Yen	59.79	59.99	61.03	60.31
Forex Reserve ($ bn)*	719.75	721.02	747.56	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

- altM raised $10.3 million in a Series A funding round led by Rainmatter by Zerodha and Mela Ventures to scale manufacturing and commercialise specialty chemicals derived from agricultural waste.
- Venomics AI raised $2.7 million to accelerate the discovery of novel drugs derived from animal venom, leveraging artificial intelligence for drug development.
- SEBI approved the IPO of Mahanadi Coalfields, with parent Coal India planning to divest a 10% stake in a listing that could raise about $1 billion.

Global Equity

- Wall Street stocks ended lower on Thursday led by technology and AI-related stocks amid concerns over data-centre spending and the impact of the US midterm election results on the sector, reversing the previous session's rally.
- US 10yr yield declined to 4.83% on Thursday amid a shift in market positioning following the technology-led equity sell-off, as investors assessed geopolitical risks and awaited the US October employment report due on Friday.
- FTSE index closed lower on Thursday reversing early gains as weakness in banking and defence stocks, the Bank of England's rate hike, and renewed selling in US technology shares weighed on sentiment.
- Asian markets were trading lower at 8.30 AM.

International

- US Initial jobless decreased by 6,000 to 189,000 in the final week of October, compared with a revised 195,000 in the previous week.
- Eurozone S&P Global Construction PMI fell to 42.5 in October 2026 compared to 43.4 in September 2026.
- Eurozone producer price inflation accelerated sharply to 11.1% in September 2026 compared to 8.3% in August 2026.
- The Bank of England raised its policy rate by 25 bps to 4.00% in November 2026, marking its first-rate hike since August 2023, citing stronger-than-expected economic activity and persistent inflation pressures.
- UK S&P Global UK Construction PMI fell to 43.6 in October 2026 compared to 46.1 in September 2026.

Upcoming market indicators

- 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)
- India Unemployment Rate, Oct (Nov 15)
- India WPI Inflation, Oct (Nov 16)
- India WPI Manufacturing, Oct (Nov 16)
- India Exports / Imports, Oct (Nov 16)
- India Balance of Trade, Oct (Nov 16)

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