2 September 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,625.1	198.2	0.81%
BSE Sensex	80,364.5	554.8	0.70%
GIFT Nifty*	24,744.5	+16.0	+0.06%
Dow Jones**	45,544.88	-92.02	-0.2%
S&P 500**	6,460.26	-41.6	-0.64%
NASDAQ**	21,455.55	-249.61	-1.15%
FTSE 100	9,196.34	9	0.1%
CAC 40	7,707.90	4	0.05%
DAX	24,037.3	135.1	0.57%
Shanghai*	3,864.6	-10.9	-0.28%
Nikkei 225*	42,291.53	102.74	0.24%
Hang Seng*	25,659.0	+41.58	+0.16%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	64.9	0.9	1.45%
Oil (Brent)	68.5	0.3	0.43%
Gold	3,494.8	18.2	0.52%
Silver	40.7	-0.6	-1.38%
Copper	9,805.0	101.5	1.05%
Cotton	0.65	0.00	0.42%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.21
USD/INR	88.20	-0.01	-0.01
GBP/INR	119.34	0.60	0.51
EUR/INR	103.36	0.40	0.39
DXY Index	97.84	-0.06	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.29	-0.46	-3.91%
S&P 500 VIXApr 24	15.36	0.93	6.44%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.584	-0.018
US 10-Year Yield	4.223	0.000

Market Updates

The markets are expected to open marginally higher today as trends in GIFT NIFTY indicate a positive start for the broader index after NIFTY closed 198 points higher at 24,625 on Monday.

Adani Green Energy

The company's subsidiary operationalized a 125 MW solar project at Khavda, taking total operational renewable capacity to 15,990.5 MW.

Ashok Leyland

The company will invest ₹5,000 crore over 7-10 years in battery manufacturing and energy storage systems through an exclusive partnership with CALB Group.

AXISCADES Technologies

The company's subsidiary Mistral Solutions received an order from CASDIC to develop 10 ECUs for Su-30 upgrade, followed by a ₹150 crore production contract.

BLS International Services

The company's subsidiary BLS International FZE subscribed 100% share capital of Consular Outsourcing Services Kenya, making it a wholly owned step-down subsidiary.

HDB Financial Services

The company allotted 15,000 secured redeemable NCDs worth ₹150 crore on private placement, proposed for listing on BSE Wholesale Debt Market.

Hitachi Energy India

The company announced ₹300 crore investment to expand Mysuru facility, doubling pressboard capacity with the first fossil-free production line for global supply.

Lloyds Metals and Energy

The company successfully commissioned a 360 KTPA sponge iron plant at Ghugus, enhancing integrated steel value chain and operational efficiency.

NMDC

The company reported iron ore production of 3.37 MT and sales of 3.39 MT in August, with cumulative output reaching 18.45 MT this fiscal.

Premier Energies

The company's subsidiaries secured ₹2,703 crore orders for supplying 2,059 MW solar PV modules and cells to various customers for execution in FY26-27.

Steel Strips Wheels

The company reported ₹385.98 crore net turnover in August, up 6.3% YoY, with record tractor sales and strong aluminium segment growth.

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