5 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,614.90	-159.40	-0.64%
BSE Sensex	78,428.95	-210.08	-0.27%
GIFT Nifty*	24,738.00	+158.5	+0.64%
Dow Jones	54,085.90	907.47	1.71%
S&P 500	7,736.52	136.02	1.79%
NASDAQ	26,585.00	671.10	2.59%
FTSE 100	10,879.40	21.68	0.20%
CAC 40	8,666.63	52.81	0.61%
DAX	26,202.35	201.04	0.77%
Shanghai*	3,839.11	16.83	0.44%
Nikkei 225*	65,969.00	2,011.49	3.15%
Hang Seng*	25,932.31	79.38	0.31%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	75.02	-0.75	-0.99%
Oil (Brent)	78.88	-0.48	-0.60%
Gold	4,157.70	5.10	0.12%
Silver	60.13	-0.12	-0.19%
Copper	14,190.00	245.15	1.76%
Cotton	0.78	-0.03	-4.47%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.03%
USD/INR	95.38	0.03	0.03%
GBP/INR	128.21	-0.03	-0.02%
EUR/INR	109.79	-0.06	-0.06%
DXY Index	99.88	-0.09	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.19	0.26	2.18%
S&P 500	16.50	0.64	4.04%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.82	-0.020
US 10-Year Yield	4.60	-0.028

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 159 points lower at 24,615 on Tuesday.

ASK Automotive
The company commenced commercial production of High Pressure Die Casted (HPDC) alloy wheels for 2W.

Avenue Supermarts
The company opened a new DMart store at Deva Road, Barabanki, Uttar Pradesh, taking its total store count to 506.

Belrise Industries
The company acquired Hyva India’s Tipper Body business from JOST Werke SE subsidiary for ~USD 5.65 mn (~₹48 crore), including manufacturing facilities in Pune, Jamshedpur, and Bangalore.

Deepak Nitrite
The company’s subsidiary, DCTL, approved a greenfield Bisphenol A (BPA) project with a capacity of up to 240 KTA and investment of ~₹2,500 crore.

HFCL
The company approved ~₹400 crore capex to expand optical fiber and OFC capacities, adding 4.6 Mn fkm p.a. of optical fiber and 14 Mn fkm p.a. of OFC capacity, with completion targeted by Jul'28.

Indian Energy Exchange
The company recorded electricity traded volume of 13.53 BU in Jul'26, up 7.7% YoY, driven by RTM volume growth of 10.2% YoY to 5.63 BU, while REC volumes declined 56.3% YoY.

Kansai Nerolac Paints
The company approved capacity additions across industrial paints, powder coating, and industrial resins at Sayakha, Bawal, and Hosur plants, with ~₹601 crore investment and completion targeted by FY29.

Pace Digitek
The company commissioned an additional 2.5 GWh BESS manufacturing line through subsidiary Lineage Power, increasing total installed BESS manufacturing capacity to 5 GWh.

Rashi Peripherals
The company formed a 74:26 JV with Japan's Restar Corporation for its semiconductor business, with operations commencing in Oct'26.

S.J.S. Enterprises
The company’s subsidiary, SDPL, commenced commercial operations at a new manufacturing facility in Ranjangaon, Pune, adding plastic plating capacity of 13,243 sq. ft. per day with ~₹100 crore investment.

Smartworks Coworking Spaces
The company added ~1.4 lakh sq. ft. capacity in Aerocity, Delhi NCR, with operationalisation targeted by Aug-Sep'26 and investment of up to ₹25 crore.

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ARETE Securities Ltd: Mittal Court, A-Wing, 10th Floor, Nariman Point, Mumbai - 400 021, Tel. No. : +91-022-4289 5600, Fax: +91 (22) 2657 3708/9

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