14 November 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,879.15	3.35	0.01%
BSE Sensex	84,478.67	12.16	0.01%
GIFT Nifty*	25,855.00	-68.00	-0.26%
Dow Jones	47,457.22	-797.6	-1.65%
S&P 500	6,737.49	-113.43	-1.66%
NASDAQ	22,870.36	-536.1	-2.29%
FTSE 100	9,807.68	-103.74	-1.05%
CAC 40	8,232.49	-8.75	-0.11%
DAX	24,041.62	-339.84	-1.39%
Shanghai*	4,024.41	-5.09	-0.13%
Nikkei 225*	50,490.99	-790.84	-1.54%
Hang Seng*	26,819.50	-253.53	-0.94%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	60.02	1.33	2.27%
Oil (Brent)	64.15	1.04	1.65%
Gold	4,201.75	7.25	0.17%
Silver	53.09	-0.08	-0.15%
Copper	10,942.00	109.00	1.01%
Cotton	0.63	0.00	0.02%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.01	0.49%
USD/INR	88.66	0.01	0.01%
GBP/INR	116.64	0.39	0.34%
EUR/INR	103.00	0.46	0.44%
DXY Index	99.21	-0.31	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.16	0.05	0.41%
S&P 500	20.00	2.49	14.22%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.512	0.029
US 10-Year Yield	4.081	-0.008

Market Updates

The markets are expected to open marginally lower today as trends in GIFT NIFTY indicate a negative start for the broader index after NIFTY closed 3 points higher at 25,879 on Thursday.

Bharat Dynamics

The company received a ₹2,095.70 crore order from the Indian Army for supplying Invar Anti-tank missiles to be executed over three years.

CESC

The company's subsidiary CESC Green Power received in-principle approval to set up 3 GW solar, 5 GWh battery, and 60 MW captive power plant.

Ceigall India

The company emerged as H1 bidder for a ₹12.19 crore Punjab water resources project to clear and de-silt the Satluj basin creek.

Fischer Medical Ventures

The company secured a ₹9.29 crore order from Tamil Nadu Animal Husbandry for supplying and installing 65 digital radiography units.

Hi-Tech Pipes

The company laid the foundation for its Greenfield manufacturing project at Hindupur, A.P., advancing towards a 2 MTPA steel capacity target.

Inox Wind

The company secured a 100 MW order for supply of 3.3 MW turbines in Gujarat along with limited EPC and multi-year O&M services.

KP Green Engineering

The company signed a framework agreement with Senvion India to jointly develop up to 2 GW of wind and hybrid renewable projects across India.

Mahindra & Mahindra

The company formed a 50:50 JV with Manulife for a life insurance venture in India and acquired Mahindra Racing UK for ₹14 crore through its subsidiary MOICML.

Muthoot Finance

The company approved ₹500 crore equity infusion in subsidiary Muthoot Money to strengthen its capital base and improve capital adequacy ratio.

NBCC India

The company received a ₹340.17 crore work order from Central University of Kashmir for Phase-I construction at Tulmulla, Ganderbal.

R Systems International

The company completed acquisition of 100% equity shares of Novigo Solutions, strengthening its digital transformation and technology service capabilities.

Zydus Lifesciences

The company received final USFDA approval for Diroximel Fumarate 231 mg delayed-release capsules, expanding its multiple sclerosis treatment portfolio and US market presence.

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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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