5 September 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,734.3	19.3	0.08%
BSE Sensex	80,718.0	150.3	0.19%
GIFT Nifty*	24,888.5	+61.0	+0.25%
Dow Jones	45,621.29	350.06	0.77%
S&P 500	6,502.08	53.82	0.83%
NASDAQ	21,707.69	209.97	0.98%
FTSE 100	9,216.87	38.88	0.42%
CAC 40	7,698.92	-20.79	-0.27%
DAX	23,770.3	175.5	0.74%
Shanghai*	3,760.3	-5.6	-0.15%
Nikkei 225*	42,887.72	307.45	0.72%
Hang Seng*	25,135.0	+76.49	+0.31%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.3	0.0	-0.06%
Oil (Brent)	66.8	-0.1	-0.19%
Gold	3,550.6	3.6	0.10%
Silver	40.8	0.1	0.20%
Copper	9,813.0	-60.0	-0.61%
Cotton	0.65	0.00	0.14%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.15
USD/INR	88.15	0.07	0.08
GBP/INR	118.48	0.41	0.34
EUR/INR	102.64	-0.03	-0.03
DXY Index	98.11	-0.03	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.85	-0.08	-0.73%
S&P 500 VIXApr 24	15.30	-1.05	-6.42%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.512	-0.038
US 10-Year Yield	4.194	-0.087

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 19 points higher at 24,734 on Thursday.

Astral

The company acquired the remaining 5% stake in its UK subsidiary Seal IT Services for ₹4.75 crore, making it a wholly owned subsidiary.

Bharat Forge

The company's step-down subsidiary Agneyastra acquired 949.65 acres in Andhra Pradesh to build a defence energetics manufacturing complex with future expansion provisions.

Container Corporation of India

The company signed an MoU with BPIPL to operate and maintain a container terminal at Bhavnagar Port in Gujarat.

Dixon Technologies

The company issued a continuing and irrevocable corporate guarantee of $50 million to its wholly owned subsidiary Padget Electronics.

HCL Infosystems

The company completed acquisition of remaining 15% stake in Pimpri Chinchwad eServices, making it a wholly owned subsidiary.

Indian Energy Exchange

The company achieved 11,803 MU traded volume up 18.9% YoY, RTM volumes 5,029 MU up 44% YoY, and RECs 21.68 lakh up 2.5% YoY.

ITI

The company secured empanelment from GIPL as System Integrator for IT infrastructure projects and Cyber Security Operations Centre worth ₹110 crore in Gujarat.

Poonawalla Fincorp

The company approved issuance of ₹1,500 crore secured, rated NCDs via private placement with ₹1,000 crore base issue and ₹500 crore green shoe option.

RPP Infra Projects

The company received ₹134.21 crore LOA from Maharashtra State Infrastructure Development Corporation for road improvement work in Raigad district.

Varun Beverages

The company has incorporated a joint venture company in India called White Peak Refrigeration Pvt. to manufacture visi-coolers and other refrigeration equipments.

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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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