18 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,287.65	-78.35	-0.32%
BSE Sensex	77,728.16	-281.09	-0.36%
GIFT Nifty*	24,297.50	-77.50	-0.32%
Dow Jones	53,459.80	-272.63	-0.51%
S&P 500	7,745.06	-40.70	-0.52%
NASDAQ	26,644.90	-84.25	-0.32%
FTSE 100	10,720.30	-29.81	-0.28%
CAC 40	8,579.60	-57.20	-0.66%
DAX	26,338.61	-101.70	-0.38%
Shanghai*	3,978.63	-4.02	-0.10%
Nikkei 225*	68,324.40	-895.90	-1.29%
Hang Seng*	25,227.00	-226.23	-0.89%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	84.92	0.42	0.50%
Oil (Brent)	91.12	0.25	0.28%
Gold	4,460.80	-12.90	-0.29%
Silver	65.61	-0.62	-0.94%
Copper	14,847.35	304.85	2.10%
Cotton	0.83	-0.01	-1.27%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	0.19%
USD/INR	95.61	0.17	0.18%
GBP/INR	129.64	0.56	0.43%
EUR/INR	110.88	0.61	0.55%
DXY Index	99.6	-0.04	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.33	0.02	0.18%
S&P 500	15.19	0.94	6.60%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	0.00	0.000
US 10-Year Yield	4.73	0.004

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 78 points lower at 24,288 on Monday.

CESC Ltd.

The company's subsidiary Purvah received a SECI letter of award to supply 70 MW under a FDRE-RTC arrangement at Rs 5.25 per kWh for 25 years.

EMS Ltd.

The company emerged as the lowest bidder (L1) for a Rs 129.80 Cr sewerage project awarded by Jodhpur Municipal Corporation, to be executed over 24 months.

Max Estates Ltd.

The company reported Q1 FY27 pre-sales of approximately Rs 1,093 Cr, up nearly 5x year-on-year, reflecting strong momentum in its real estate business.

NELCO Ltd.

The company partnered with Elveo for D2D and IoT connectivity across South Asia, and invested USD 20 million (Rs 166 Cr) in Lunar Holdco CCDs for satellite connectivity.

NIBE Ltd.

The company won a Rs 563.35 Cr contract from the Indian Army to supply 30 loiter munition systems, executable within 12 months.

PTC Industries Ltd.

The company's Q1 FY27 income rose 83% and PAT surged 466%, driven by new orders from Airbus, BrahMos, DRDO, and Gun Factory.

Texmaco Rail & Engineering Ltd.

The company signed a share subscription and shareholders' agreement worth up to Rs 200 Cr in subsidiary TDTL, diluting its stake from 100% to 70%.

Uflex Ltd.

The company commissioned a new PET bottle and mixed plastics recycling unit at its Noida facility, expanding its recycling capacity.

UPL Ltd.

The company's step-down arm Advanta BV will acquire Egypt's Misr Hytech for USD 110 million (approximately Rs 913 Cr), with closing expected by January 31, 2027.

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