3 February 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,088.40	262.95	1.06%
BSE Sensex	81,666.46	943.52	1.17%
GIFT Nifty*	26,159.00	+923.5	+4.07%
Dow Jones	49,407.66	515.19	1.05%
S&P 500	6,976.44	37.41	0.54%
NASDAQ	23,592.11	130.29	0.56%
FTSE 100	10,341.56	118.02	1.15%
CAC 40	8,181.17	54.64	0.67%
DAX	24,797.52	258.71	1.05%
Shanghai*	4,023.45	7.71	0.19%
Nikkei 225*	54,130.86	1475.68	2.8%
Hang Seng*	26,692.10	- 83.47	- 0.31%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.73	-0.41	-0.66%
Oil (Brent)	66.12	-0.19	-0.29%
Gold	4,776.29	+115.40	+2.48%
Silver	82.44	+3.14	+3.96%
Copper	12,985.85	-1.15	-0.01%
Cotton	0.63	0.00	+0.14%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.19	0.00	0.03%
USD/INR	91.51	-0.48	-0.52%
GBP/INR	125.45	-0.89	-0.71%
EUR/INR	108.56	-0.98	-0.90%
DXY Index	97.48	0.33	0.00%

VIX	Value	Change (Pts)	Change (%)
India	13.87	-1.23	-8.15%
S&P 500	16.34	-1.1	-6.31%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.762	0.064
US 10-Year Yield	4.218	-0.043

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 262 points higher at 25,088 on Monday.

Adani Ports and Special Economic Zone

The company handled 44.8 MMT cargo in Jan’26 up +12% YoY led by containers +16% liquids +21% and dry cargo +8% with YTD volumes at 412.2 MMT up +11% YoY.

Aurionpro Solutions

The company secured a data center infrastructure expansion contract from IDBI Bank, covering electrical, cooling, security and MEP upgrades in a live environment.

Brigade Hotel Ventures

The company signed an MoU with the Government of Tamil Nadu committing an investment of ₹1,100 crore to develop over 500 new hotel keys across three properties in Chennai.

Gateway Distriparks

The company acquired ~25 acres near Indore to develop an ICD with ~120,000 TEUs capacity involving ₹150 crore capex after railways’ in-principal approval.

Godrej Properties

The company sold homes worth over ₹2,000 crore in Phase 1 launch of Godrej Trilogy Worli, selling nearly 100 homes from ~₹3,500 crore inventory.

IRB InvIT Fund

The company completed acquisition of VM7 Expressway HAM asset from sponsor for ~₹1,200 crore, expanding operational portfolio to 10 highway assets.

Power Grid Corporation of India

The company announced commissioning of Khavda II-C transmission project through its subsidiary enabling evacuation of 4.5 GW renewable power at Khavda.

Rain Industries

The company through Rain Carbon Germany partnered in a €1.7 million German-funded three-year R&D program to develop cleaner European graphite processing technology.

RITES

The company signed an MoU with SAIL for wet leasing of locomotives with O&M support and higher-schedule maintenance of SAIL’s diesel-electric locomotives for rail operations at SAIL’s plants and mines.

Tata Chemicals

The company approved ₹515 crore capex to set up a 210 KTPA greenfield IVSD salt manufacturing facility in Tamil Nadu, funded via internal accruals or financing.

Tata Power

The company commissioned a 198 MW group captive wind project in Karur Tamil Nadu via TPREL to supply renewable power to Tata Steel.

Thomas Cook India

The company signed a long-term strategic MOU with the Government of Tamil Nadu to jointly develop tourism products and drive increased domestic travel to the state.

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