6 August 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,649.6	-73.2	-0.30%
BSE Sensex	80,710.3	-308.5	-0.38%
GIFT Nifty*	24,704.0	-36.0	-0.15%
Dow Jones	44,111.74	-61.9	-0.14%
S&P 500	6,299.19	-30.75	-0.49%
NASDAQ	20,916.55	-137.03	-0.65%
FTSE 100	9,142.73	14.43	0.16%
CAC 40	7,621.04	-10.97	-0.14%
DAX	23,846.1	88.4	0.37%
Shanghai*	3,620.2	+2.62	+0.07%
Nikkei 225*	40,786.31	236.77	0.58%
Hang Seng*	24,851.5	-51.0	-0.20%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	65.5	0.3	0.48%
Oil (Brent)	68.0	0.3	0.40%
Gold	3,375.6	-7.5	-0.22%
Silver	37.8	0.0	-0.05%
Copper	9,576.5	-46.0	-0.48%
Cotton	0.66	0.01	0.81%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.24
USD/INR	87.80	0.13	0.15
GBP/INR	116.69	0.17	0.15
EUR/INR	101.34	-0.04	-0.04
DXY Index	98.81	0.19	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.71	-0.26	-2.17%
S&P 500 VIXApr 24	17.85	0.33	1.88%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.331	0.002
US 10-Year Yield	4.210	-0.035

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 73 points lower at 24,649 on Tuesday.

Astra Microwave Products
The company received a ₹135 crore order from DRDO for upgradation of ground-based radar systems, to be executed over 18 months.

Aurionpro Solutions
The company acquired Australia-based InfraRisk to enhance its Integro lending suite and expand presence across Australia and Europe.

CAMS
The company launched CAMSAi, India's first domain-trained AI for capital markets and BFSI, enabling compliance-grade intelligent automation using proprietary datasets.

NBCC (India)
The company received a revised ₹102.97 crore work order from Lokpal of India for retrofitting and infrastructure upgrade of its Delhi office.

NTPC Green Energy
The company's subsidiary NTPC REL won SECI's e-auction to supply 70,000 MT/Year Green Ammonia to Krishana Phoschem at ₹51.80/kg, and a group company declared COD of 75 MW, raising NTPC group's installed capacity to 82,977 MW.

RailTel
The company received ₹18.57 crore order from Airports Authority of India to provide MPLS-VPN services at AAI airports and offices till Aug 2030.

Royal Orchid Hotels
The company signed a 43-key Regenta Place in Baddi, Himachal Pradesh, expanding its presence in underserved North Indian markets.

Shyam Metalics and Energy
The company reported July sales with YoY volume growth in stainless steel (+42%), aluminium foil (+9%), speciality alloys (+13%), carbon steel (+6%) and pig iron (+51%), while sponge iron and pellet volumes declined by -20% and -15% respectively.

Texmaco Rail & Engineering
The company received ₹73.12 crore order from Central Railway for design, supply and commissioning of 110KV/25KV traction substation over 24 months.

TVS Motor Company
The company's subsidiary TVS Motor (Singapore) completed its €4 million acquisition of 9.72% in Killwatt GmbH after milestone-linked final payment.

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