13 February 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,807.20	-146.65	-0.57%
BSE Sensex	83,674.92	-558.72	-0.66%
GIFT Nifty*	25,726.50	-124.50	-0.48%
Dow Jones	49,451.98	-669.42	-1.34%
S&P 500	6,832.76	-108.71	-1.57%
NASDAQ	22,597.15	-469.32	-2.03%
FTSE 100	10,402.44	-69.67	-0.67%
CAC 40	8,340.56	27.32	0.33%
DAX	24,852.69	-3.46	-0.01%
Shanghai*	4,119.86	-14.16	-0.34%
Nikkei 225*	57,207.48	-432.36	-0.75%
Hang Seng*	26,576.50	-456.05	-1.69%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.82	-0.02	-0.03%
Oil (Brent)	67.55	0.00	0.0%
Gold	4,978.59	56.39	1.15%
Silver	76.80	1.63	2.17%
Copper	13,172.00	-155.00	-1.16%
Cotton	0.62	0.00	0.16%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.19	0.00	0.12%
USD/INR	90.59	-0.12	-0.13%
GBP/INR	123.66	-0.57	-0.46%
EUR/INR	107.70	-0.41	-0.38%
DXY Index	96.96	0.00	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.73	0.18	1.56%
S&P 500	20.82	3.17	17.96%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.700	-0.010
US 10-Year Yield	4.169	0.036

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 146 points lower at 25,807 on Thursday.

Anupam Rasayan India
The company completed acquisition of 100% stake in Doriath and 15% stake in Batam as part of Monitchem Kansas acquisition and approved USD 20 mn credit facility and USD 30 mn ECB to finance the transaction.

Black Box
The company’s step down subsidiary entered into a definitive agreement to acquire 100% stake in Brazil based 2S Inovações Tecnológicas for around Rs 275 crore in cash to strengthen its Latin America presence and managed services portfolio.

Ceigall India
The company through its wholly owned subsidiary received LOA from NHAI for a ₹2,160 crore four lane highway project in Bihar under Hybrid Annuity Model with 730 days construction period and 15 year O&M.

Escorts Kubota
The company approved further investment of up to Rs 500 crore in Escorts Kubota Finance Limited in addition to the earlier approved Rs 200 crore.

GFCL
The company through its subsidiary GFCL EV SFZ LLC signed Invest and land lease agreements with Salalah Free Zone Company LLC Oman to set up a greenfield advanced battery materials project with an initial investment of about USD 216 Mn.

Hindustan Aeronautics
The company signed a Rs 2,312 crore contract with the Ministry of Defence for supply of 8 Dornier 228 aircraft with operational role equipment for the Indian Coast Guard under Buy Indian category.

Hindustan Construction Company
The company secured a ₹577 crore railway contract from Northeast Frontier Railway in JV with 65% stake for tunnel and allied works under Dimapur Kohima new BG line project.

Hindustan Unilever
The company approved acquisition of remaining 49% stake in OZiva for Rs 824 crore making it a wholly owned subsidiary and divestment of 19.8% stake in Nutritionalab for Rs 307 crore as part of portfolio transformation strategy.

J. Kumar Infraprojects
The company received a Rs 615.53 crore EPC order from NBCC for redevelopment of GPRA Colony at Netaji Nagar New Delhi with 24 month execution timeline.

Marine Electricals
The company received orders worth Rs 15.15 crore from Aurionpro Solutions for supply of power distribution units with execution over 12 months.

National Highways Infra Trust
The company received acceptance from NHAI for acquisition of Round 5 projects at an aggregate valuation of Rs 6,220.90 crore as base concession fees subject to unitholder approval.

REC
The company divested its subsidiary Bellary Davanagere Power Transmission Limited to Power Grid Corporation of India Limited for Rs 13.02 crore.

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