15 October 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,145.50	-81.85	-0.32%
BSE Sensex	82,029.98	-297.07	-0.36%
GIFT Nifty*	25,288.50	+93.5	+0.37%
Dow Jones	46,270.46	202.88	0.44%
S&P 500	6,644.31	-10.41	-0.16%
NASDAQ	22,521.70	-172.91	-0.76%
FTSE 100	9,452.77	9.9	0.1%
CAC 40	7,919.62	-14.64	-0.18%
DAX	24,236.94	-150.99	-0.62%
Shanghai*	3,872.63	7.40	0.19%
Nikkei 225*	47,358.20	510.88	1.09%
Hang Seng*	25,750.50	309.15	1.22%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	58.72	0.14	0.24%
Oil (Brent)	62.38	0.10	0.16%
Gold	4,179.65	37.33	0.90%
Silver	52.07	0.60	1.17%
Copper	10,600.00	-17.50	-0.16%
Cotton	0.64	0.00	0.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.09%
USD/INR	88.79	0.11	0.12%
GBP/INR	117.81	-0.46	-0.39%
EUR/INR	102.60	-0.21	-0.20%
DXY Index	98.89	-0.41	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.16	0.15	1.36%
S&P 500	20.81	1.78	9.35%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.508	-0.004
US 10-Year Yield	4.005	-0.108

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 81 points lower at 25,145 on Tuesday.

B.L. Kashyap and Sons
The company secured a ₹295 crore order from Embassy Construction for civil and structural work at Bengaluru's Embassy Business Hub Phase II.

Bharti Airtel
The company partnered with Google to establish India's first mega AI hub and data center in Visakhapatnam, enhancing digital infrastructure nationwide.

Cochin Shipyard
The company secured a mega order from a European client for six 1,700 TEU LNG-fuelled feeder vessels, boosting its shipbuilding portfolio.

Concord Control Systems
The company increased its stake to 46.5% in Progota India to accelerate deployment of Kavach 4.0 across Indian Railways.

DCM Shriram
The company commissioned a 35,000 TPA Epichlorohydrin plant in Jhagadia, linking chlor-alkali and advanced materials with greener glycerine-based production.

GR Infraprojects
The company received a Taking Over Certificate for 7.5Km elevated structures and five Bangalore Metro Phase-2 stations, contract price ₹364.87 crore.

Infosys
The company won a £1.2 billion, 15-year NHSBSA contract to deliver a next-generation workforce management solution for England and Wales.

KEC International
The company secured a Rs 1,064 crore order for design, supply, and installation of a 380 kV transmission line in Saudi Arabia.

Lemon Tree Hotels
The company signed a license agreement for a 54-room hotel in Gandhidham, Gujarat, managed by its subsidiary Carnation Hotels, expanding regional presence.

Mishra Dhatu Nigam
The company secured a Rs. 306 crore order, taking its total open order position to around Rs. 2,212 crore.

Star Cement
The company approved raising up to ₹1,500 crore through private, preferential, rights, or qualified institutions placement, with shareholder approval via postal ballot.

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