25 September 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,063.10	-383.70	-1.64%
BSE Sensex	73,580.54	-1,247.71	-1.67%
GIFT Nifty*	23,080.00	-17.50	-0.08%
Dow Jones	51,350.00	-161.61	-0.31%
S&P 500	7,704.13	-1.90	-0.02%
NASDAQ	26,939.40	3.34	0.01%
FTSE 100	10,680.00	-25.27	-0.24%
CAC 40	8,081.43	-41.98	-0.52%
DAX	25,266.53	-144.10	-0.57%
Shanghai**	3,889.84	-46.68	-1.19%
Nikkei 225*	66,247.00	733.01	1.12%
Hang Seng*	24,365.50	-395.63	-1.60%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	93.09	-1.52	-1.61%
Oil (Brent)	105.74	-0.86	-0.81%
Gold	4,327.30	29.30	0.68%
Silver	64.40	0.40	0.62%
Copper	14,763.85	30.00	0.20%
Cotton	0.80	0.01	0.76%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.11%
USD/INR	95.96	0.21	0.22%
GBP/INR	126.95	-0.20	-0.16%
EUR/INR	109.15	-0.08	-0.07%
DXY Index	101.24	0.13	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.69	2.34	22.61%
S&P 500	15.67	0.49	3.23%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.11	0.060
US 10-Year Yield	5.19	0.030

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 384 points lower at 23,063 on Thursday.

Balrampur Chini Mills

The company received a ₹75 crore BIRAC grant to establish a 100 TPA PLA co-polymer R&D facility at its Kumbhi, Uttar Pradesh, complex.

Interarch Building Solutions

The company commissioned a heavy structural steel facility at Attivaram, Andhra Pradesh, with Phase I capacity of 24,000 MT p.a., while Phase 2 civil works are underway.

Kalpataru Projects International

The company secured orders worth ~₹2,025 crore across Power T&D, B&F, and Oil & Gas businesses, taking FY27 YTD order inflows to ₹13,219 crore.

Lemon Tree Hotels

The company signed a license agreement for a 90-room hotel in Patancheru, Telangana, and its subsidiary, Fleur Hotels, acquired a 989.3 sq m land parcel in Bandra (East), Mumbai, for ₹120 crore to develop a ~172-key Lemon Tree Premier hotel.

Rain Industries

The company's subsidiary, Rain Carbon, entered a strategic collaboration with BioBTX to process renewable aromatic oil into benzene, phthalic anhydride, and other aromatic derivatives.

Royal Orchid Hotels

The company launched a 43-key Regenta Place property in Baddi, Himachal Pradesh, through its subsidiary, Regenta Hotels.

Samvardhana Motherson

The company completed the sale of its 26% stake in AES India, an EPC JV with T-NET Japan, to T-NET Japan and its nominees.

Sterlite Technologies

The company expanded its Neuralis data center portfolio with pre-terminated fiber trunk assemblies ranging from 48F to 6,912F for hyperscale and enterprise data centers.

Thomas Cook India

The company opened a new outlet in Raja Rajeshwari Nagar, Bengaluru, taking its network to 13 outlets in Bengaluru and 18 across Karnataka.

Waaree Energies

The company's wholly owned subsidiary, WCES, entered the specialty gases market, with a semiconductor-grade gases plant under development at GIDC Saykha, Dahej.

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