

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,149.9	-205.4	-0.81%
BSE Sensex	82,500.5	-689.8	-0.83%
GIFT Nifty*	25,185.0	-6.5	-0.03%
Dow Jones	44,371.51	-279.13	-0.63%
S&P 500	6,259.75	-20.71	-0.33%
NASDAQ	20,585.53	-45.14	-0.22%
FTSE 100	8,941.12	-34.54	-0.38%
CAC 40	7,829.29	-72.96	-0.92%
DAX	24,255.3	-201.5	-0.82%
Shanghai*	3,526.8	+16.63	+0.47%
Nikkei 225*	39,429.45	-140.23	-0.35%
Hang Seng*	24,171.0	+142.63	+0.59%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	68.5	-0.2	-0.29%
Oil (Brent)	70.5	-0.2	-0.24%
Gold	3,358.6	2.6	0.08%
Silver	38.6	0.2	0.60%
Copper	9,637.5	-114.5	-1.17%
Cotton	0.66	0.00	-0.53%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.12
USD/INR	85.79	0.14	0.16
GBP/INR	116.26	-0.31	-0.26
EUR/INR	100.30	-0.19	-0.19
DX Index	97.82	0.17	0.17

VIX	Value	Change (Pts)	Change (%)
India VIX	11.82	0.15	1.29%
S&P 500 VIXApr 24	16.40	0.62	3.93%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.322	0.013
US 10-Year Yield	4.389	0.039

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 205 points lower at 25,149 on Friday.

DLF

The company received ₹100 crore as first tranche under arbitration settlement with TFDRL and remaining amount is secured via 1.5 lakh sq ft mortgage.

HFCL

The company approved ₹125.55 crore capex to expand IBR cable capacity from 1.73 mfkms to 19.01 mfkms across Hyderabad and Goa by June 2026.

HUDCO

The company signed a non-binding MoU with MPUDCL to provide ₹1,00,000 crore financial assistance over 5 years for housing and infrastructure projects.

Kamat Hotels

The company signed an agreement to manage a second luxury hotel in Rishikesh with 44 rooms under The Orchid brand.

Lloyds Enterprises

The company's subsidiary LRDL signed an MOU to acquire 51% in CLPL for ₹60 crore and extend ₹242 crore debt to develop 99-acre Taloja logistics park.

NCC

The company received ₹2,269 crore LOA from MMRDA for a 24-month Mumbai Metro Line 6 Package-1 project including signalling, telecom, and rolling stock.

ITES

The company received ₹46.82 crore turnkey order (36-month duration) from DCTE Karnataka for college construction and renovation under PM-USHA scheme.

RVNL

The company received ₹213.22 crore LOA from South Central Railway for 24-month OHE upgradation in Duvvada-Rajahmundry & Samalkot-Kakinada Port section.

Tata Elxsi

The company signed a MoU with Synopsys to jointly offer advanced vECU and digital twin solutions for software-defined vehicle development and validation.

Titagarh Rail Systems

The company signed a 99-year lease with WB Govt for 40.009 acres at ₹126.63 crore to expand metro, Vande Bharat and defence rolling stock infra with testing and commissioning facilities at Uttarpara.

Wockhardt

The company exited the US generics segment after \$8 million FY25 loss, filing Chapter 7 for 2 US units to focus on antibiotics and insulin.

Zydus Lifesciences

The company's US subsidiary ZPUI incorporated Zylidac Bio LLC in the US to acquire biologics manufacturing assets of Agenus.

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