30 March 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,819.60	-486.85	-2.09%
BSE Sensex	73,583.22	-1,690.23	-2.25%
GIFT Nifty*	22,576.50	-250.50	-1.10%
Dow Jones	45,166.60	-793.47	-1.73%
S&P 500	6,368.85	-108.31	-1.67%
NASDAQ	20,948.40	-459.72	-2.15%
FTSE 100	9,967.35	-4.82	-0.05%
CAC 40	7,701.95	-67.36	-0.87%
DAX	22,300.75	-312.22	-1.38%
Shanghai*	3,882.98	-30.74	-0.79%
Nikkei 225*	51,010.40	-2,362.63	-4.43%
Hang Seng*	24,470.00	-481.89	-1.93%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	102.99	3.35	3.36%
Oil (Brent)	116.75	4.18	3.71%
Gold	4,469.60	-22.90	-0.51%
Silver	68.65	-1.15	-1.64%
Copper	12,107.95	-25.80	-0.21%
Cotton	0.69	0.00	-0.17%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	0.06%
USD/INR	94.81	0.83	0.88%
GBP/INR	126.13	0.64	0.51%
EUR/INR	109.20	0.17	0.15%
DXY Index	100.17	0.31	0.00%

VIX	Value	Change (Pts)	Change (%)
India	26.80	2.16	8.77%
S&P 500	28.73	0.24	0.84%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.93	0.060
US 10-Year Yield	4.40	-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 486 points lower at 22,819 on Friday.

Aditya Birla Real Estate

The company's subsidiary Birla Estates entered Mumbai redevelopment through a JV with Parinee Group for a 2.9 lakh sq ft luxury residential project in Khar West with ₹1,700 crore revenue potential.

Coal India

The company received ₹1057.09 crore LOA from Telangana Power Generation Corporation for 187.5 MW or 750 MWh BESS project at Choutuppal at ₹3.14 lakh per MW per month tariff.

Easy Trip Planners

The company entered an exclusive partnership with MSTC to provide technology enabled travel services for government sector organisations through API integration.

J K Cement

The company approved acquisition of 0.24 MnTPA cement grinding assets of Sri Chakra Cement and 34 acres land in Vizianagaram for ₹28.79 crore.

Jindal Stainless

The company part commissioned a 315.6 MW solar wind hybrid project across Madhya Pradesh and Gujarat with ₹2,000 crore investment including ₹132 crore commitment from the company.

Jupiter Life Line Hospitals

The company received MMRDA approval for 80 year lease of 10,026.44 sqm land at BKC for ₹354 crore to develop a ~400 bed hospital.

Larsen & Toubro

The company secured significant ₹1,000 crore - ₹2,500 crore orders for a float glass plant in Gujarat and a two wheeler manufacturing facility in Andhra Pradesh along with add on orders.

PCBL Chemical

The company commissioned 30,000 MTPA carbon black capacity through its subsidiary PCBL TN increasing total capacity from 2,07,000 MTPA with commercial production commenced.

Quality Power Electrical Equipments

The company's step down subsidiary Endoks Enerji received an international order worth ₹152 crore with option up to ₹292 crore for supply and integration of BESS to be executed by ~Dec 2027.

Saatvik Green Energy

The company's subsidiary Saatvik Solar Industries received and accepted ₹638.26 crore order from a domestic solar modules manufacturer for supply of Solar Cell G12 R Type.

SEAMEC

The company in consortium secured ONGC contract worth ₹329.92 crore for O&M services of MSV Samudra Prabha for 698 days commencing within 60 days.

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