3 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,383.60	66.45	0.27%
BSE Sensex	78,094.64	166.49	0.21%
GIFT Nifty*	24,617.50	+169.5	+0.69%
Dow Jones	52,485.00	276.97	0.53%
S&P 500	7,489.72	52.09	0.70%
NASDAQ	25,373.90	251.68	1.00%
FTSE 100	10,868.00	-29.22	-0.27%
CAC 40	8,509.64	24.00	0.28%
DAX	25,629.24	17.21	0.07%
Shanghai*	3,816.22	-16.04	-0.42%
Nikkei 225*	63,380.70	-981.35	-1.52%
Hang Seng*	25,846.00	-38.44	-0.15%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	80.10	-4.57	-5.40%
Oil (Brent)	83.71	-4.22	-4.80%
Gold	4,113.50	6.50	0.16%
Silver	58.33	0.54	0.94%
Copper	13,833.30	40.15	0.29%
Cotton	0.80	-0.01	-0.94%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.37%
USD/INR	95.39	-0.30	-0.31%
GBP/INR	128.30	0.29	0.23%
EUR/INR	109.75	0.07	0.06%
DXY Index	99.71	-0.31	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.76	-0.40	-3.29%
S&P 500	15.99	-1.10	-6.44%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.83	0.020
US 10-Year Yield	4.70	-0.049

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 66 points higher at 24,383 on Friday.

Bharat Electronics
The company received ₹847 crore worth of orders for electro optics, security operation centres, seekers, components, spares, and services.

HFCL
The company secured export orders worth ~₹522.7 crore (USD 54.8 million) from international customers for the supply of optical fiber cables, with execution scheduled by Jan'27.

Hero MotoCorp
The company launched the VIDA VX2 Go FB electric scooter with a 3.1 kWh fixed battery, 128 km IDC range, priced at ₹1.13 lakh, with deliveries commencing ~Aug'26.

K.P. Energy
The company executed a 25-year PPA with GUVNL for a 100 MW wind power project at a tariff of ₹3.435/unit, with supply scheduled to commence by Jul'28.

NCC
The company secured three orders worth ~₹1,052.7 crore (ex-GST) during July 2026, comprising ~₹590.4 crore in the Buildings division and ~₹462.3 crore in the Water division.

Park Medi World
The company launched The Medicity Hospital in Rudrapur, adding a 330-bed multi-specialty hospital in Uttarakhand and expanding its operational footprint to six states.

Powerica
The company executed a 25-year PPA with GUVNL to develop a 100 MW wind power project in Gujarat at a tariff of ₹3.435/kWh, with project execution targeted within 24 months.

RailTel Corporation of India
The company secured a ~₹33.8 crore purchase order from IRCTC for Infrastructure-as-a-Service (IaaS), with execution through Sep'29 under a two-year contract extendable by one year.

Steel Strips Wheels
The company reported record monthly turnover in Jul'26, with net turnover rising 50.7% YoY to ₹571.1 crore and gross turnover increasing 43.1% YoY to ₹659.9 crore, driven by broad-based growth across aluminium, 2W, truck, and tractor segments.

Sterlite Technologies
The company secured a ~₹960 crore multi-year supply agreement from a domestic telecom operator for optical fibre cables, with execution across FY28-FY29 and an option to extend the contract by two years.

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