27 November 2026

# Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

| Indices | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| Nifty 50 | 25,884.50 | 65.25 | 0.25% |
| BSE Sensex | 84,328.59 | 390.31 | 0.46% |
| GIFT Nifty* | 25,960.50 | -71.50 | -0.27% |
| Dow Jones | 50,182.95 | 164.25 | 0.33% |
| S&P 500 | 7,182.78 | -18.31 | -0.25% |
| NASDAQ | 23,585.80 | -147.73 | -0.62% |
| FTSE 100 | 10,609.30 | 182.36 | 1.75% |
| CAC 40 | 8,108.74 | 128.17 | 1.61% |
| DAX | 25,215.52 | 513.39 | 2.08% |
| Shanghai* | 3,475.85 | -1.03 | -0.03% |
| Nikkei 225* | 58,076.26 | 577.10 | 1.00% |
| Hang Seng* | 22,395.00 | 168.12 | 0.76% |

***As at 8.00 am***

| Commodity | Price (USD) | Change (Pts) | Change (%) |
|---|---|---|---|
| Oil (WTI) | 85.69 | 2.01 | 2.40% |
| Oil (Brent) | 96.38 | -0.19 | -0.20% |
| Gold | 3,623.36 | 55.96 | 1.57% |
| Silver | 43.40 | 3.34 | 8.34% |
| Copper | 11,962.35 | 260.50 | 2.23% |
| Cotton | 0.80 | 0.01 | 0.67% |

| Currency | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| EUR/USD | 1.0980 | 0.0006 | 0.05% |
| USD/INR | 92.44 | 0.20 | 0.22% |
| GBP/INR | 121.18 | 0.76 | 0.63% |
| EUR/INR | 101.42 | 0.54 | 0.54% |
| DXY Index | 103.72 | -0.11 | -0.11% |

| VIX | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| India | 16.84 | -0.86 | -4.86% |
| S&P 500 | 26.80 | 0.44 | 1.67% |

| Indicators | Value (%) | Change (Bps) |
|---|---|---|
| India 10-Year Yield | 7.24 | 0.000 |
| US 10-Year Yield | 4.91 | 0.058 |

## 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 65 points higher at 25,885 on Thursday.**

### Amber Enterprises India Ltd.

The company said its step-down subsidiary Ascent Circuits signed an MoU with Guidance, Government of Tamil Nadu, to invest about INR 500 Cr over five years from 2027 to expand bare printed circuit board manufacturing.

### Hindustan Foods Ltd.

The company announced an investment of INR 100 Cr to set up a new greenfield manufacturing facility for Home Care liquid products in the state of Tamil Nadu.

### Jyoti Structures Ltd.

The company received a Letter of Intent worth INR 272 Cr from Sterlite Grid 5 for the 400 kV Xeldom–Narendra transmission line project, of which INR 175.67 Cr is incremental order value.

### Panacea Biotec Ltd.

The company said the Hungarian authority NCPHP has withdrawn its non-compliance report on the Baddi manufacturing facility, allowing its group company Panacea Biotec Pharma to resume supplies to customers in Germany and the European Union.

### Patel Engineering Ltd.

The company has been declared the lowest bidder by its wholly owned subsidiary Dirang Energy for the 144 MW Gongri Hydro Project in Arunachal Pradesh, valued at INR 1,441.04 Cr including GST, with 48-month execution.

### Ratnaveer Precision Engineering Ltd.

The company said it is targeting revenue of INR 3,914 Cr and EBITDA of INR 775 Cr by FY29, backed by capex of INR 338 Cr on its CCL project.

### SRM Contractors Ltd.

The company bagged a contract worth INR 111.16 Cr from the National Highways Authority of India to build grade separators on a highway in Gujarat, with execution scheduled over 18 months.

### Unimech Aerospace and Manufacturing Ltd.

The company said its subsidiaries will invest INR 16.2 Cr in equity to acquire a 76% stake in surface engineering company Aurai Technologies, part of a planned INR 45 Cr investment in surface engineering.

### Viviana Power Tech Ltd.

The company has been declared the lowest bidder for the PGVCL Gujarat Wire Free City Scheme worth INR 463.57 Cr, taking its order book above INR 2,000 Cr.

### Welspun Corp Ltd.

The company received an export order for LSAW pipes for execution in FY28, has secured further orders worth about INR 2,264 Cr globally, and holds a consolidated order book of about INR 50,000 Cr.

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ARETE Securities Ltd: Mittal Court, A-Wing, 10th Floor, Nariman Point, Mumbai - 400 021, Tel. No. : +91-022-4289 5600, Fax: +91 (22) 2657 3708/9

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