

20 January 2026

# Morning Glance

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,585.50	-108.85	-0.42%
BSE Sensex	83,246.18	-324.17	-0.39%
GIFT Nifty*	25,601.00	+34.0	+0.13%
Dow Jones**	49,359.33	-83.11	-0.17%
S&P 500**	6,940.01	-4.46	-0.06
NASDAQ **	23,515.39	-14.63	-0.06
FTSE 100	10,195.35	-39.94	-0.39
CAC 40	8,112.02	-146.92	-1.78
DAX	24,959.06	-338.07	-1.34%
Shanghai*	4,093.83	-20.17	-0.49%
Nikkei 225*	52,925.92	-657.65	-1.23
Hang Seng*	26,434.50	-129.40	-0.49%

\*As at 8.00 am

\*\* Market Holiday

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	59.33	-0.1	-0.17
Oil (Brent)	64.07	-0.08	-0.12
Gold	4,677.36	81.96	1.78%
Silver	93.29	4.76	5.37%
Copper	13,000.00	0.00	0.00%
Cotton	0.65	0.00	0.03%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	0.21%
USD/INR	90.95	0.08	0.09%
GBP/INR	121.82	0.07	0.06%
EUR/INR	105.63	0.14	0.13%
DX Index	99.06	-0.29	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.83	0.45	3.96%
S&P 500	18.84	3.00	18.94

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.683	-0.004
US 10-Year Yield	4.177	0.000

## 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 108 points lower at 25,585 on Monday.

### Apollo Micro Systems

The company was allotted land at TSIIIC Hardware Park Hyderabad for a greenfield defence manufacturing facility with land investment ₹27.59 crore and planned capex ₹300 crore.

### Aurionpro Solutions

The company won a multi-year engagement to implement its cash management platform for CSB Bank including software licensing implementation and annual maintenance.

### AXISCADES Technologies

The company's subsidiary Mistral Solutions secured a supply order from BEL Ministry of Defence for signal and data processing units valued at about ₹100 crore.

### Deepak Nitrite

The company's subsidiary commissioned nitration and hydrogenation plant at Dahej Gujarat with capital expenditure of about ₹85 crore.

### Gujarat Mineral Development Corporation

The company received indigenous rare earth processing technology from BARC for its Ambadungar Rare Earth Project to enable pilot-scale processing.

### Gulf Oil Lubricants India

The company entered lubricant partnerships with ACE Action Construction Equipment, Ammann India and XCMG to supply OEM-approved genuine oils for construction equipment in India.

### HPCL

The company signed a 10-year LNG supply agreement with ADNOC Gas subsidiary ALNG to supply LNG at its Chhara terminal in Gujarat.

### Lemon Tree Hotels

The company signed a licence agreement for Keys Select by Lemon Tree Hotels in Khurpatal Uttarakhand with 120 rooms managed by its subsidiary.

### Pace Digitek

The company's subsidiary Lineage Power received a ₹94.35 crore advance purchase order from BSNL to supply Li-ion battery modules racks and AMC.

### Syngene International

The company extended its strategic collaboration with Bristol Myers Squibb through 2035, expanding integrated drug discovery, development, manufacturing and clinical services.

### Uno Minda

The company approved investment up to ₹6.50 crore in a renewable energy SPV to source wind and solar power for its Gujarat units.

### Waaree Energies

The company received orders to supply 210 MW DCR solar modules in India and 2000 MW solar modules through its US subsidiary.

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