Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,512.65	-601.85	-2.60%
BSE Sensex	72,696.39	-1,836.57	-2.46%
GIFT Nifty*	22,888.00	+423.0	+1.88%
Dow Jones	46,208.50	631.00	1.38%
S&P 500	6,581.00	74.52	1.15%
NASDAQ	21,946.80	299.15	1.38%
FTSE 100	9,894.15	-24.18	-0.24%
CAC 40	7,726.20	60.58	0.79%
DAX	22,653.86	273.67	1.22%
Shanghai*	3,850.47	37.19	0.98%
Nikkei 225*	51,910.4	394.9	0.77%
Hang Seng*	24,769.9	387.4	1.59%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	1.34	0.00	-0.19%
Oil (Brent)	1.37	0.00	0.14%
Gold	1.16	0.00	-0.20%
Silver	158.52	0.09	0.06%
Copper	11,890.85	-130.55	-1.09%
Cotton	0.67	0.00	-0.51%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	-0.01	-0.54%
USD/INR	93.95	0.23	0.25%
GBP/INR	124.92	-0.49	-0.39%
EUR/INR	108.19	-0.03	-0.03%
DXY Index	99.36	-0.14	0.00%

VIX	Value	Change (Pts)	Change (%)
India	26.73	3.92	17.19%
S&P 500	0.79	0.00	0.19%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.84	0.100
US 10-Year Yield	4316.10	-91.200

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 601 points lower at 22,512 on Monday.

Adani Green Energy

The company operationalized 510.1 MW renewable power projects at Khavda Gujarat increasing total operational capacity to 17,982.3 MW.

Birla Corporation

The company commissioned a third production line at its Kundanganj unit increasing capacity by 1.4 million ton to 21.4 million ton with ₹300 crore investment.

Bosch

The company entered a 50:50 joint venture with Tata Autocomp Systems to manufacture eAxles and electric motors in India with operations planned by mid 2026.

Coal India

The company approved divestment of up to 25% stake in Mahanadi Coalfields via OFS or IPO, ₹3,160 crore corporate guarantee for CRAUL solar project and incorporation of a wholly owned Singapore IHC to pursue overseas critical mineral acquisitions.

G R Infraprojects

The company received ₹2440.87 crore LOA from NHAI for 4 lane NH 33 Mokama to Munger project in Bihar on HAM with 910 day completion period.

Hindustan Foods

The company entered a BTA to acquire Ultra Beauty Care manufacturing business at Aurangabad on a slump sale basis with completion expected in Q1 FY27.

NBCC

The company received work order worth ₹58.61 crore from Maharaja Sriram Chandra Bhanja Deo University for project management consultancy.

Samvardhana Motherson International

The company revised completion timelines with 28.15% stake acquisition in HR Dhauliganga expected in Q1 FY27 and MTSL becoming wholly owned subsidiary by Q2 FY27.

SEPC

The company approved acquisition of 90% stake in Avenir International Engineers Abu Dhabi for ₹1530 crore via share swap subject to approvals.

Vintage Coffee and Beverages

The company commenced commercial production of additional 4,500 MTPA soluble coffee capacity under brownfield expansion increasing total capacity from 6,500 MTPA to 11,000 MTPA funded through internal accruals.

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