

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,897.95	-275.10	-1.14%
BSE Sensex	76,664.21	-999.79	-1.29%
GIFT Nifty*	24,139.00	+185.0	+0.77%
Dow Jones	49,230.70	-79.61	-0.16%
S&P 500	7,165.08	56.68	0.80%
NASDAQ	24,836.60	398.09	1.63%
FTSE 100	10,379.10	-77.93	-0.75%
CAC 40	8,157.82	-69.50	-0.84%
DAX	24,128.98	-26.47	-0.11%
Shanghai*	4,088.95	9.05	0.22%
Nikkei 225*	60,632.10	915.90	1.53%
Hang Seng*	25,971.81	-6.27	-0.02%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	95.51	1.11	1.18%
Oil (Brent)	106.67	1.34	1.27%
Gold	4,719.20	-21.70	-0.46%
Silver	75.22	-1.19	-1.56%
Copper	13,229.85	40.00	0.30%
Cotton	0.77	0.01	0.72%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.03%
USD/INR	94.06	0.26	0.27%
GBP/INR	126.92	0.09	0.07%
EUR/INR	110.07	-0.12	-0.11%
DXI Index	98.48	-0.34	0.00%

VIX	Value	Change (Pts)	Change (%)
India	19.71	1.12	6.02%
S&P 500	18.71	-0.60	-3.11%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.93	-0.020
US 10-Year Yield	4.32	0.008

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 275 points lower at 23,897 on Friday.

Ashoka Buildcon

The company received a Letter of Contract Acceptance from Angola's Ministry of Energy and Water for the Electricity Sector Improvement and Access Project worth USD 72.36 million.

Chalet Hotels

The company approved the acquisition of Seasons Hotels Private Limited, owner of Inder Residency Resort & Spa, Udaipur (144 rooms, 8.2 acres), for Rs 171 crore.

Gujarat Themis Biosyn

The company signed an asset purchase agreement to acquire Sanofi's global anti-TB and anti-infective portfolio of 13 branded generic products across 55+ countries for EURO 158 million.

HCC (Hindustan Construction Company)

The company, through the LCESPL-HCC Joint Venture, secured a Rs 2,917 crore CIDCO contract to build a 22.21 km raw water tunnel and a 250 MLD water treatment plant in Raigad.

IKS Health Limited

The company entered into a definitive agreement to acquire TruBridge, a provider of healthcare technology solutions for rural and community hospitals, at USD 26.25 per share.

Larsen & Toubro (L&T)

The company entered the B2B industrial electronics segment by launching L&T Electronic Products & Systems (LTEPS), with manufacturing operations commencing at its Coimbatore campus, Tamil Nadu.

Pace Digitek

The company executed an OEM Exclusivity Agreement with NEC XON Systems (South Africa), granting exclusive rights to market and sell its Battery Energy Storage Systems across five African territories.

Raghav Productivity Enhancers

Plans capacity expansion of 1,20,000 MTPA, taking total capacity to 5,34,000 MTPA by October 2026.

Zensar Technologies

The company reported FY26 revenue, growing 3.1% YoY, with Q4FY26 PAT at 14.4% of revenue and a record quarterly order book of USD 401.8 million.

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