29 July 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,985.35	-10.60	-0.04%
BSE Sensex	76,765.92	-69.86	-0.09%
GIFT Nifty*	24,226.50	+135.0	+0.56%
Dow Jones	52,747.30	537.24	1.03%
S&P 500	7,428.78	15.60	0.21%
NASDAQ	24,876.90	-55.17	-0.22%
FTSE 100	10,871.00	89.27	0.83%
CAC 40	8,458.78	52.72	0.63%
DAX	25,464.01	102.98	0.41%
Shanghai*	3,791.28	-22.03	-0.58%
Nikkei 225*	61,317.30	-1,047.62	-1.68%
Hang Seng*	25,693.50	382.64	1.51%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	82.53	3.27	4.13%
Oil (Brent)	87.46	3.37	4.01%
Gold	4,032.40	-6.30	-0.16%
Silver	57.91	0.38	0.66%
Copper	13,643.45	-166.20	-1.20%
Cotton	0.79	0.00	0.29%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.04%
USD/INR	95.70	-0.20	-0.20%
GBP/INR	127.23	-0.61	-0.47%
EUR/INR	108.80	-0.48	-0.44%
DXY Index	101.36	-0.16	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.56	-0.10	-0.79%
S&P 500	18.21	-0.46	-2.46%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.78	0.000
US 10-Year Yield	4.62	0.012

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 11 points lower at 23,985 on Tuesday.

Apollo Micro Systems
The company received a Make-II Prototype Sanction Order from the Indian Air Force as Prime OEM to develop a 500 kg Smart Bomb, with a procurement commitment upon successful prototype demonstration.

Dilip Buildcon
The company emerged as the L1 bidder for a ₹2,524.32 crore WRD Chhattisgarh pipeline project, with execution over 30 months and a 5-year O&M period.

Indian Oil Corporation
The company announced a ₹13,805 crore investment in the Paradip Paraxylene project and planned ₹5,446 crore for the Bhadrak Textile Park JV and other downstream projects in Odisha.

Larsen & Toubro
The company, in a consortium with Hitachi Energy, signed a framework agreement with TenneT for four 2 GW offshore HVDC projects across the Netherlands and Germany, representing 8 GW of cumulative transmission capacity.

Lemon Tree Hotels
The company signed a licence agreement for a 51-room Keys Select hotel in Panthpiplai, Ujjain, to be managed by its wholly owned subsidiary, Carnation Hotels.

Marine Electricals
The company secured a ₹141.74 crore order from Princeton Digital Group India for the supply, installation, testing, and commissioning of power distribution systems, with execution over 10 months.

Pace Digitek
The company's subsidiary, Lineage Power, crossed production of 300 utility-scale BESS containers, representing ~1.5 GWh of storage capacity, while expanding BESS manufacturing capacity from 2.5 GWh to 10 GWh.

RailTel Corporation
The company received a ₹43.90 crore work order from Odisha Police to deploy 170 IT, cyber forensic, and finance experts across cyber crime and CC & EO police stations, with execution over ~3 years.

RVNL
The company received a ₹358.97 crore EPC order from East Central Railway for 41.04 km doubling work on the Kundawa Chainpur to Raxaul section, with execution over ~3 years.

Shyam Metalics and Energy
The company's wholly owned subsidiary, Shyam Sel and Power, commissioned an 8.90 MWp captive solar power project at its Jamuria plant for captive consumption and energy cost optimization.

ZF Commercial Vehicle Control Systems India
The company secured multi-year ESC business nominations from three commercial vehicle OEMs, with local assembly and SOP scheduled for Q3CY27.

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