

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,592.0	105.1	0.45%
BSE Sensex	77,606.4	317.9	0.41%
GIFT Nifty*	23,755.0	-6.0	-0.03%
Dow Jones	42,299.7	-155.1	-0.37%
S&P 500	5,693.3	-18.9	-0.33%
NASDAQ Comp.	17,804.0	-95.0	-0.53%
FTSE 100	8,666.1	-23.5	-0.27%
CAC 40	7,990.1	-40.6	-0.51%
DAX	22,678.7	-160.3	-0.70%
Shanghai*	3,358.8	-14.9	-0.44%
Nikkei 225*	36,996.6	-803.4	-2.13%
Hang Seng*	23,578.8	95.5	0.41%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	69.8	-0.1	-0.13%
Oil (Brent)	74.0	-0.1	-0.11%
Gold	3,073.6	17.4	0.57%
Silver	34.3	-0.1	-0.41%
Copper	9,813.5	-71.9	-0.73%
Cotton	0.67	0.00	-0.63%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.08	0.00	0.37
USD/INR	85.78	0.06	0.07
GBP/INR	110.83	0.18	0.16
EUR/INR	92.42	-0.11	-0.12
DX Index	104.50	-0.05	-0.05

VIX	Value	Change (Pts)	Change (%)
India VIX	13.30	-0.17	-1.26%
S&P 500 VIXApr 24	18.69	0.36	1.96%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.591	-0.015
US 10-Year Yield	4.4	0.073

## 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 105 points higher at 23,591 on Thursday.

## Adani Green Energy

The company operationalized 396.7 MW renewable projects in Khavda, Gujarat, increasing total operational capacity to 13,487.8 MW.

## BEML

The company secured a ₹405 crore contract from BMRCL for metro car design, manufacturing, supply, installation, testing, commissioning, and maintenance.

## Bharat Electronics

The company received additional orders worth ₹1,385 crore, taking total orders in FY25 to ₹18,415 crore, including radar spares and EVMs.

## Bharat Forge

The company's subsidiary, Kalyani Strategic Systems, partnered with Duma Engineering Group in a joint venture to form a new company in Spain, targeting advanced defence product solutions for Indian, European, and select export markets.

## Cube Highways Trust

The company approved raising ₹1,160 crore via debt securities on a private placement basis.

## DCM Shriram

The company commissioned a 12 TPD compressed biogas plant at Ajbapur Unit with ₹131.30 crore investment, and commercial production has commenced.

## Dilip Buildcon

The company's consortium received an Advance Work Order worth ₹2,631.14 crore for BSNL Bharat Net Phase-III in Jammu & Kashmir and Ladakh.

## HCLTech

The company joined Samsung's SAFE™ program as a Design Solution Partner to provide ASIC design services, enhancing semiconductor innovation and development.

## Infosys

The company partnered with LKQ Europe to implement a cloud-based HR platform using Infosys Cobalt, streamlining HR processes across 18 countries.

## UFLEX

The company's step-down subsidiary, Flex America, commenced commercial operations of its new 18,000 MTPA CPP films production line in Mexico.

## UltraTech Cement

The company commissioned 6.85 mtpa cement capacity across Maihar (MP), Dhule (MH), Durgapur (WB), and a 1.8 mtpa bulk terminal in Lucknow (UP).

## Zen Technologies

The company secured a ₹152 crore order from the Ministry of Defence for supplying Integrated Air Defence Combat Simulator (IADCS) for L70 Gun.

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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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