7 September 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,897.70	24.25	0.10%
BSE Sensex	76,515.43	362.57	0.48%
GIFT Nifty*	23,962.00	-48.00	-0.20%
Dow Jones	53,414.20	-271.86	-0.51%
S&P 500	7,718.60	-29.11	-0.38%
NASDAQ	26,507.00	-77.07	-0.29%
FTSE 100	10,831.10	-0.43	0.00%
CAC 40	8,278.77	-7.63	-0.09%
DAX	26,046.40	43.08	0.17%
Shanghai*	3,931.93	1.81	0.05%
Nikkei 225*	66,626.30	1,605.34	2.47%
Hang Seng*	25,423.50	-227.38	-0.89%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	92.04	0.56	0.61%
Oil (Brent)	96.81	0.53	0.55%
Gold	4,454.70	-21.90	-0.49%
Silver	66.61	-0.14	-0.21%
Copper	14,370.85	12.00	0.08%
Cotton	0.82	-0.01	-1.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.11%
USD/INR	94.49	-0.01	-0.01%
GBP/INR	127.79	0.24	0.19%
EUR/INR	109.77	0.11	0.10%
DXY Index	99.18	0.15	0.00%

VIX	Value	Change (Pts)	Change (%)
India	10.68	-0.66	-5.82%
S&P 500	14.53	0.21	1.47%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.96	0.000
US 10-Year Yield	4.78	0.022

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 24 points higher at 23,898 on Friday.

Brigade Enterprises

The company acquired 4.04 acres in Hyderabad's Neopolis through an outright purchase for a residential project with revenue potential of >₹2,700 crore and 650+ homes.

CG Power & Industrial Solutions

The company rolled out the first transformer from its Sehore plant, with 10,000 MVA capacity operational and ₹792 crore investment toward planned 45,000 MVA capacity.

Eicher Motors

The company launched the Himalayan 440 at ₹2.29 lakh ex-showroom, featuring a 443cc engine and six-speed gearbox.

JSW Energy

The company commissioned 1,572 MW since Apr'26, taking operational capacity to 15.0 GW, including 1,272 MW renewable and 300 MW thermal capacity, with renewables accounting for 60% of the portfolio.

Lemon Tree Hotels

The company signed license agreements for two hotels in Bodhgaya, Bihar, adding 145 rooms to its portfolio, while de-flagging its 80-room Lemon Tree Premier Gurugram property.

Marine Electricals

The company received orders/LOIs worth ₹80.8 crore from DXDC Chennai and Micron Semiconductor for power distribution systems, with execution over 4-5 months.

Ola Electric

The company opened its first dealer-operated stores across seven states and targets a 500+ dealership network over the next couple of quarters, shifting to a partner-led distribution model.

RVNL

The company secured a ₹903 crore order from SJVN Thermal for construction of a permanent siding and aerial track connection for the 1,320 MW Buxar Thermal Power Project in Bihar, with execution over 36 months.

Shakti Pumps

The company invested ₹11 crore in its wholly owned subsidiary, Shakti Energy Solutions, to establish a 2.2 GW solar DCR cell and PV module manufacturing plant in Pithampur, Madhya Pradesh.

SPML Infra

The company developed a proprietary 104.4 kWh BESS battery pack, completing key international safety and performance certifications, with BESS manufacturing and integration capabilities being established in Pune.

TCS

The company's subsidiary, HyperVault, secured 264 acres in Hyderabad to develop a phased AI data center campus with up to 1 GW capacity, with HyperVault and partners investing up to ₹70,000 crore.

Texmaco Rail & Engineering

The company secured two orders worth ₹131.4 crore from TCI and Touax Texmaco Railcar Leasing for supply of five wagon rakes, with execution by May'27.

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