15 September 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,398.10	-79.70	-0.34%
BSE Sensex	74,781.76	-120.84	-0.16%
GIFT Nifty*	23,522.00	+78.5	+0.33%
Dow Jones	52,421.20	-152.09	-0.29%
S&P 500	7,619.98	-37.00	-0.48%
NASDAQ	26,186.40	-146.62	-0.56%
FTSE 100	10,697.60	47.13	0.44%
CAC 40	8,117.78	-61.99	-0.76%
DAX	25,440.81	-127.75	-0.50%
Shanghai*	3,877.29	-8.04	-0.21%
Nikkei 225*	64,000.40	507.37	0.80%
Hang Seng*	24,854.40	-63.20	-0.25%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	102.75	1.36	1.34%
Oil (Brent)	106.98	1.30	1.23%
Gold	4,347.80	-4.10	-0.09%
Silver	63.96	-0.18	-0.28%
Copper	14,043.85	-194.65	-1.37%
Cotton	0.81	0.00	0.21%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.08%
USD/INR	95.55	0.10	0.11%
GBP/INR	129.08	-0.24	-0.19%
EUR/INR	110.81	-0.24	-0.22%
DXY Index	99.61	0.52	0.01%

VIX	Value	Change (Pts)	Change (%)
India	12.29	0.49	4.15%
S&P 500	17.10	1.26	7.95%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.02	0.040
US 10-Year Yield	5.00	0.039

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 80 points lower at 23,398 on Friday.

AXISCADES Technologies
The company completed acquisition of 90% of Cloud Wave Technologies and its subsidiaries for ₹234 crore, at an enterprise valuation of ~₹260 crore.

GPT Infraprojects
The company's WOS secured an ₹85.53 crore Railway signalling order from Eastern Railway, including auto signalling and electronic interlocking works, with execution over 12 months.

Greenply Industries
The company approved a ₹200 crore corporate guarantee for its wholly owned subsidiary's MDF capacity expansion and agreed terms for Samet to raise its JV voting stake to ~81%, diluting Greenply to ~19%.

JSW Infrastructure
The company received an LOI to set up an Inland Container Depot at Kudathini, Ballari, Karnataka, for EXIM cargo, with commissioning targeted within one year.

KEC International
The company secured new orders worth ₹1,303 crore across T&D and Cables & Conductors, including 400kV transmission line orders in India and 380kV lines in Saudi Arabia.

NTPC Green Energy
The company commissioned 6.3 MW of the Vanki Wind Energy Project in Gujarat, taking group commercial capacity to 10,842.86 MW.

Raymond
The company secured aerospace orders with annual business potential of ~₹33 crore across 300+ part numbers, with production commencing progressively through 2026-27.

Shakti Pumps
The company invested ₹11 crore in its wholly owned subsidiary to establish a 2.2 GW greenfield Solar DCR cell and PV modules plant in Pithampur, Madhya Pradesh.

Solar Industries India
The company, through its wholly owned step-down subsidiary, agreed to acquire South Africa's Omnia Holdings for ~₹12,951 crore in cash, subject to regulatory and shareholder approvals.

Tata Chemicals
The company's US subsidiary, TCNA, completed the acquisition of Searles Valley Minerals' North American soda ash customer contracts covering >500,000 tonnes over two years.

Uno Minda
The company approved four capacity projects with aggregate capex of ~₹1,415 crore across Haryana, Tamil Nadu, Bengaluru, and Maharashtra, including alloy wheels, casting, and automotive components, with commissioning through FY29.

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