27 July 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,767.45	-102.15	-0.43%
BSE Sensex	76,059.77	-331.62	-0.43%
GIFT Nifty*	23,964.00	+136.0	+0.57%
Dow Jones	51,947.20	235.60	0.46%
S&P 500	7,411.98	3.68	0.05%
NASDAQ	24,975.80	-161.87	-0.64%
FTSE 100	10,736.20	97.06	0.91%
CAC 40	8,372.28	73.19	0.88%
DAX	25,099.00	335.88	1.36%
Shanghai*	3,835.16	20.96	0.55%
Nikkei 225*	64,774.60	163.41	0.25%
Hang Seng*	25,181.00	217.76	0.87%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	85.51	-3.80	-4.25%
Oil (Brent)	93.05	-3.73	-3.85%
Gold	4,105.50	34.70	0.85%
Silver	59.92	1.01	1.71%
Copper	13,616.00	-128.85	-0.94%
Cotton	0.76	-0.02	-2.62%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.34%
USD/INR	96.57	-0.01	-0.01%
GBP/INR	129.12	0.02	0.01%
EUR/INR	110.20	0.07	0.06%
DXY Index	101.16	-0.27	0.00%

VIX	Value	Change (Pts)	Change (%)
India	13.90	0.42	3.12%
S&P 500	18.58	-0.12	-0.64%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.83	-0.010
US 10-Year Yield	4.64	-0.038

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 102 points lower at 23,767 on Friday.

Adani Energy Solutions
The company secured an ~₹8,500 crore interstate transmission project in Andhra Pradesh to support 4,500 MW Green Hydrogen and Green Ammonia projects, adding 1,582 ckm transmission lines and 10,500 MVA transformation capacity.

Atul
The company approved ₹167 crore capex to set up 1,000 TPA MCPP-p and 750 TPA MCPA manufacturing capacity, with commissioning in ~67 weeks, funded through internal accruals.

AXISCADES Technologies
The company completed the acquisition of a 32,847 sq. m. land parcel in Telangana for ₹39.42 crore to establish a defence hardware manufacturing and integration facility.

Coforge
The company secured a 5-year contract worth over $230 million from a European client for an AI-led business transformation program.

HCLTech
The company plans to establish its first AI Data Center at Odisha Sovereign AI Park with Sarvam and the Government of Odisha, with a planned investment of ₹14,257 crore.

Jamna Auto Industries
The company approved the acquisition of a 100% stake in UK-based Owen Springs for £2 million in cash, with completion by August 2026.

Larsen & Toubro
The company secured large international orders worth ₹2,500-₹5,000 crore for process plant equipment across Asia, Africa, North America, South America, and Europe.

Marine Electricals
The company secured orders worth ~₹376.22 crore from Siemens, Titagarh Naval Systems, and Princeton Digital Group for power distribution systems and electrical equipment, with execution over 8-21 months.

NTPC Green Energy
The company's subsidiary, NTPC Renewable Energy, declared the commercial operation of 64.76 MW solar capacity at Khavda, taking the group's operational renewable capacity to 10,786.56 MW.

PTC Industries
The company received a development order from Gun Factory Kanpur for two major artillery gun components, strengthening its presence in indigenous defence manufacturing.

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