

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,541.8	24.8	0.10%
BSE Sensex	83,697.3	90.8	0.11%
GIFT Nifty*	25,675.5	+19.0	+0.07%
Dow Jones	44,494.94	400.17	0.91%
S&P 500	6,198.01	-6.94	-0.11%
NASDAQ Comp.	20,202.89	-166.84	-0.82%
FTSE 100	8,785.33	24.37	0.28%
CAC 40	7,662.59	-3.32	-0.04%
DAX	23,673.3	-236.3	-0.99%
Shanghai*	3,453.4	-4.3	-0.13%
Nikkei 225*	39,580.25	-406.08	-1.02%
Hang Seng*	24,188.5	+116.22	+0.48%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	65.5	0.0	-0.02%
Oil (Brent)	67.2	-0.1	-0.16%
Gold	3,331.6	-7.7	-0.23%
Silver	36.1	0.0	-0.03%
Copper	10,061.0	21.0	0.20%
Cotton	0.68	0.00	0.58%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	-0.08
USD/INR	85.52	-0.23	-0.27
GBP/INR	117.82	0.38	0.32
EUR/INR	101.05	0.52	0.52
DX Index	96.46	-0.41	-0.43

VIX	Value	Change (Pts)	Change (%)
India VIX	12.53	-0.26	-2.03%
S&P 500 VIX Apr 24	16.83	0.1	0.60%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.369	-0.030
US 10-Year Yield	4.197	-0.060

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 25,541 on Tuesday.

Adani Enterprises

The company's arm ADSTL completed ₹400 crore cash acquisition of 85.1% in aircraft MRO firm Air Works India Engineering.

Aurionpro Solutions

The company won a strategic deal with a UK bank to deploy Arya.ai's AI-native lending tech across Europe via its Integro Suite.

Ceigall India

The company's arm received NHA approval for its ₹1,199.3 crore HAM project to construct a 35.4 km 4/6 lane Northern Ayodhya Bypass in Uttar Pradesh.

JSW Energy

The company's arm signed BESPA with RVUNL for a 250 MW/500 MWh BESS project in Rajasthan under a 12-year build-own-operate model.

Keystone Realtors

The company received LoA for GTB Nagar redevelopment in Mumbai with 20.7 lakh sq ft saleable area and ₹4,521 crore GDV.

Lloyds Metals and Energy

The company acquired 79.82% in Thriveni Earthmovers and Infra for ₹70 crore, adding 71 MT MDO contracts with scalable growth potential.

Nazara Technologies

The company's subsidiary Nodwin completed ₹7.58 crore acquisition of 92.3% in AFK Gaming, making it a step-down subsidiary.

NMDC

The company reported June iron ore production at 3.57 MT (up 5.9% YoY) and sales at 3.58 MT (down 4% YoY); cumulative FY26 production rose 30.5% to 11.99 MT and sales rose 14.3% to 11.51 MT.

NTPC

The company's arm NTPC REL declared COD of 32.8 MW and 64.7 MW capacities under its Khavda solar projects in Gujarat.

Paras Defence and Space Technologies

The company's subsidiary will export up to 30 CHIMERA 200 anti-drone systems worth ₹22 crore to France's CERBAIR.

RailTel Corporation

The company received ₹15.85 crore work order from Cuttack Development Authority for AI-based billboards installation across eight locations in Cuttack.

RITES

The company secured a \$3.6 million international order from African Rail Company to supply two overhauled ALCO locomotives for southern Africa.

Zen Technologies

The company acquired equity and CCDs in TISA Aerospace, raising its stake to 76%, making TISA a subsidiary of the company.

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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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