# Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

| Indices | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| Nifty 50 | 26,068.15 | -124.00 | -0.47% |
| BSE Sensex | 85,231.92 | -400.76 | -0.47% |
| GIFT Nifty* | 26,163.50 | +85.5 | +0.33% |
| Dow Jones | 46,245.41 | 493.15 | 1.08% |
| S&P 500 | 6,602.99 | 64.23 | 0.98% |
| NASDAQ | 22,273.08 | 195.03 | 0.88% |
| FTSE 100 | 9,539.71 | 12.06 | 0.13% |
| CAC 40 | 7,982.65 | 1.58 | 0.02% |
| DAX | 23,091.87 | -186.98 | -0.80% |
| Shanghai* | 3,831.41 | -3.48 | -0.09% |
| Nikkei 225* | 48,625.88 | -1198.06 | -2.4% |
| Hang Seng* | 25,565.50 | 345.48 | 1.37% |

***As at 8.00 am***

| Commodity | Price (USD) | Change (Pts) | Change (%) |
|---|---|---|---|
| Oil (WTI) | 57.96 | -0.10 | -0.17% |
| Oil (Brent) | 62.42 | -0.09 | -0.14% |
| Gold | 4,080.70 | -35.30 | -0.86% |
| Silver | 49.65 | -0.26 | -0.52% |
| Copper | 10,685.50 | -103.50 | -0.96% |
| Cotton | 0.64 | 0.00 | 0.44% |

| Currency | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| EUR/USD | 1.15 | 0.00 | -0.10% |
| USD/INR | 89.49 | 0.78 | 0.88% |
| GBP/INR | 116.87 | 0.85 | 0.73% |
| EUR/INR | 103.13 | 0.87 | 0.85% |
| DXY Index | 100.21 | 0.01 | 0.00% |

| VIX | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| India VIX | 13.63 | 1.49 | 12.27% |
| S&P 500 | 23.43 | -2.99 | -11.32% |

| Indicators | Value (%) | Change (Bps) |
|---|---|---|
| India 10-Year Yield | 6.556 | 0.010 |
| US 10-Year Yield | 4.065 | -0.074 |

## 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 124 points lower at 26,068 on Friday.**

### Adani Enterprises
The company's JV AdaniConneX executed ₹231.34 crore SPA for acquisition of 100% stake in Trade Castle Tech Park to support infrastructure development.

### Ather Energy
The company secured a partnership with Evolution Auto for the launch of the Rizta electric two-wheeler in Sri Lanka.

### Godrej Properties
The company secured a ~75-acre land parcel in Nagpur for a plotted residential development with an estimated revenue potential of ~₹755 crore.

### Interglobe Aviation
The company approved USD 820 million investment in InterGlobe Aviation Financial Services IFSC for acquisition of aviation assets to support fleet ownership expansion.

### Jyoti CNC Automation
The company commenced expanded operations at its subsidiary Huron Graffenstaden SAS facility in Strasbourg, France doubling capacity to support global manufacturing growth.

### KNR Constructions
The company received ₹319.24 crore LOA from Musi Riverfront Development Corporation for 24-month construction of an iconic bridge across Mir Alam Tank.

### Lemon Tree Hotels
The company signed a license agreement for a 50-room Keys Select hotel in Bhopal to support its managed-portfolio hospitality expansion.

### NBCC
The company received ₹42.37 crore LOA from National Horticulture Board for CIP Agra planning and execution.

### Powergrid
The company received agreement from Nepal Electricity Authority for cross-border 400 kV transmission link projects in India and Nepal to support high-capacity power transfer infrastructure.

### RateGain Travel Technologies
The company entered a strategic partnership with HotelIQ, a hotel business intelligence and analytics platform, to integrate Navigator rate shopping solutions worldwide to support hotel revenue optimization.

### Trident
The company announced a ₹2,000 crore expansion plan in Punjab, allocating ₹1,500 crore towards new terry towel and paper facilities in Barnala and ₹500 crore for a corporate center in Mohali.

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