Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,780.25	-360.25	-1.56%
BSE Sensex	72,771.72	-1,124.02	-1.52%
GIFT Nifty*	22,807.50	-17.00	-0.07%
Dow Jones	51,481.50	-347.11	-0.67%
S&P 500	7,683.69	-59.72	-0.77%
NASDAQ	26,820.40	-248.34	-0.92%
FTSE 100	10,684.90	-10.37	-0.10%
CAC 40	8,078.48	0.68	0.01%
DAX	25,374.42	-34.22	-0.13%
Shanghai*	3,821.50	-2.12	-0.06%
Nikkei 225*	65,203.40	-674.18	-1.02%
Hang Seng*	24,496.00	-146.51	-0.59%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	93.54	0.94	1.02%
Oil (Brent)	106.59	1.31	1.24%
Gold	4,163.30	-5.10	-0.12%
Silver	61.11	-0.61	-0.99%
Copper	14,544.35	-195.50	-1.33%
Cotton	0.79	0.00	0.19%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.12%
USD/INR	95.98	0.15	0.16%
GBP/INR	127.26	0.39	0.31%
EUR/INR	109.19	0.03	0.03%
DXY Index	101.2	0.16	0.00%

VIX	Value	Change (Pts)	Change (%)
India	13.64	1.48	12.17%
S&P 500	16.07	1.20	8.07%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.18	0.060
US 10-Year Yield	5.24	-0.006

Market Updates

The markets are expected to open marginally lower today as trends in GIFT NIFTY indicate a negative start for the broader index after NIFTY closed 360 points lower at 22,780 on Friday.

Ellenbarrie Industrial Gases

The company won a ₹481 crore order from BHEL to supply and erect a 1,200 TPD air separation unit for an Odisha coal-to-ammonium nitrate project, with commissioning expected in FY29.

Global Health

The company received a 10,560.36 sq.m Land allotment in Ghaziabad from UPAVP for ₹165.82 crore, enabling a 350+ bed hospital.

Godrej Properties

The company signed a development agreement for a 2.5-acre Marine Lines project with Man Infraconstruction, with estimated revenue potential of around ₹6,000 crore.

IRFC

The company signed a ₹4,200 crore loan agreement with DVC to fund renewable energy projects.

Kalpataru Projects International

The company won a Letter of Award for an EPC gas pipeline project in the UAE estimated at over ₹4,000 crore.

Natco Pharma

The company raised its investment in eGenesis by US$16.7 million, taking total exposure to US$24.7 million.

NCC

The company received a ₹1,076.71 crore order for the Anakapalli drinking water supply project in Andhra Pradesh, executable over 24 months.

NMDC

The company commissioned a ₹5,427 crore iron ore processing plant, slurry pipeline and pellet plant in Bastar, Chhattisgarh.

Paras Defence and Space Technologies

The company won a ₹26.59 crore DRDO order for a hyperspectral mission optics unit, deliverable by September 2027.

Power Mech Projects

The company won a ₹279.20 crore, three-year O&M order from Telangana Power Generation Corporation for its YTPS plant.

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