15 July 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,052.05	-158.95	-0.66%
BSE Sensex	77,054.94	-561.46	-0.72%
GIFT Nifty*	24,038.00	+23.5	+0.10%
Dow Jones	52,508.30	9.63	0.02%
S&P 500	7,543.59	28.25	0.38%
NASDAQ	26,107.00	233.83	0.90%
FTSE 100	10,529.40	31.10	0.30%
CAC 40	8,366.85	2.20	0.03%
DAX	25,147.03	32.78	0.13%
Shanghai*	3,968.38	1.25	0.03%
Nikkei 225*	68,340.40	596.86	0.88%
Hang Seng*	24,532.91	192.17	0.79%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	80.13	0.79	1.00%
Oil (Brent)	85.76	1.03	1.22%
Gold	4,036.40	-33.30	-0.82%
Silver	58.66	-0.44	-0.75%
Copper	13,540.60	80.25	0.60%
Cotton	0.79	-0.01	-0.64%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	0.11%
USD/INR	96.20	0.57	0.60%
GBP/INR	128.70	0.65	0.51%
EUR/INR	109.65	0.34	0.31%
DXY Index	100.82	-0.47	0.00%

VIX	Value	Change (Pts)	Change (%)
India	13.75	0.47	3.54%
S&P 500	16.50	-0.66	-3.85%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.80	0.060
US 10-Year Yield	4.59	0.007

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 159 points lower at 24,052 on Tuesday.

Dalmia Bharat Sugar & Industries
The company approved a $132 million Tanzania sugar project comprising a 3,500 TCD sugar plant and a 20 MW co-gen facility.

Delhivery
The company's wholly owned subsidiary, Delhivery Financial Services, received RBI approval for Type II NBFC-ND registration.

Easy Trip Planners
The company signed an MoU with the Government of Jharkhand to digitally promote the state's tourism through marketing campaigns and destination-focused content initiatives.

Godawari Power & Ispat
The company temporarily suspended operations at its 2.0 MTPA iron ore pellet plant, contributing 5.5% of FY26 turnover, due to gas supply curtailment and lower iron ore availability, with Q2FY27 profitability likely to be impacted.

KEC International
The company secured new orders worth ₹1,180 crore across T&D, renewables, civil, and cables, including projects in India, the Middle East, and the Americas, its first data centre transmission line, and a 200+ MW solar PV project.

Landmark Cars
The company reported record Q1 sales, with revenue from operations rising 22.5% YoY to ₹1,733 crore, driven by 24.2% YoY growth in vehicle sales and 14.0% YoY growth in after-sales.

Lemon Tree Hotels
The company signed a license agreement for a 70-room hotel in Jorhat, Assam, while de-flagging its 112-room managed hotel in Dubai.

NBCC (India)
The company secured work orders worth ~₹501.45 crore, including a ₹430.69 crore school laboratory construction project in Rajasthan, a ₹60.61 crore EPC contract from Bharat Electronics, and two PMA contracts from Power Finance Corporation.

OneSource Specialty Pharma
The company partnered with Formycon AG to provide integrated DS and DP manufacturing for global biosimilar programs from its Bengaluru biologics facility.

Signature Global
The company reported Q1FY27 pre-sales of ₹1,970 crore, up 25% QoQ, collections of ₹670 crore, and launched its first branded residences project with Tonino Lamborghini in Gurugram.

Tata Consultancy Services
The company partnered with New Terminal One at New York's JFK Airport to provide digital infrastructure, passenger processing systems, AI-enabled IT operations, and cybersecurity services.

Welspun Corp
The company secured ~₹1,400 crore export pipe orders for oil and gas projects, taking its consolidated order book to ~₹23,650 crore, executable over FY27 and FY28.

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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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