5 March 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,480.50	-385.20	-1.55%
BSE Sensex	79,116.19	-1,122.66	-1.40%
GIFT Nifty*	24,693.00	+56.0	+0.23%
Dow Jones	48,739.41	238.14	0.49%
S&P 500	6,869.50	52.87	0.78%
NASDAQ	22,807.48	290.79	1.29%
FTSE 100	10,567.65	83.52	0.8%
CAC 40	8,167.73	63.89	0.79%
DAX	24,205.36	414.71	1.74%
Shanghai*	4,104.73	22.26	0.55%
Nikkei 225*	55,779.29	1533.75	2.83%
Hang Seng*	25,618.03	368.54	1.46%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	77.36	2.70	3.62%
Oil (Brent)	83.52	0.94	1.14%
Gold	5,181.52	40.67	0.79%
Silver	84.70	0.70	0.83%
Copper	12,959.15	140.30	1.09%
Cotton	0.61	-0.01	-1.21%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	-0.01	-0.63%
USD/INR	91.41	0.43	0.47%
GBP/INR	122.09	-0.58	-0.47%
EUR/INR	107.21	-0.10	-0.10%
DXY Index	98.82	-0.29	0.00%

VIX	Value	Change (Pts)	Change (%)
India	21.14	4.01	23.41%
S&P 500	21.15	-2.42	-10.27%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.67	-0.010
US 10-Year Yield	4.09	-0.006

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 385 points lower at 24,480 on Wednesday.

Apollo Micro Systems

The company received cumulative orders worth ₹73.32 crore from DRDO, DPSUs, private companies and other government departments for homing systems, fire control systems, launchers, avionic LRUs and cyber security systems.

Capillary Technologies

The company secured a five year $20mn deal with a top US retailer and Fortune 50 company to implement Loyalty+ and aiRA for AI driven customer engagement and personalization.

CarTrade Tech

The company launched SuperDost an AI powered transaction tool for instant buyer seller matchmaking across its platforms, initially rolled out for used car dealers.

Glenmark Pharmaceuticals

The company's Glenmark Specialty SA received U.S. FDA approval for Fluticasone Propionate Inhalation Aerosol 44 mcg with 180 day Competitive Generic Therapy exclusivity and U.S. commercialization to start March 2026.

Godrej Properties

The company won a bid for ~5 acre land off EM Bypass Kolkata for a premium residential project with estimated revenue potential of ₹1,650 crore and acquired 11.36 acre land in Gurugram's Sector 63A for residential development with estimated revenue potential of ₹4,500 crore.

Hindustan Unilever

The company completes the sale of its entire stake in Nutritionalab for approximately Rs 307 crore.

Mahindra Holidays & Resorts India

The company signed a new 110 key Club Mahindra resort in Dapoli Maharashtra with phased launch of 52 keys in Q1 FY27 and remaining in Q2 FY27.

MRF

The company signed a non binding MoU with the Government of Tamil Nadu to set up a greenfield tyre manufacturing facility at SIPCOT Industrial Park Sivaganga with proposed investment of ₹5,300 crore over 12 years subject to approvals and incentives.

Paras Defence and Space Technologies

The company signed an MoU with Green Optics Co South Korea for joint development manufacturing and business development of optics and optical systems for space and defence applications.

The Great Eastern Shipping Company

The company contracted to acquire a secondhand 81,094 dwt Kamsarmax dry bulk carrier financed from internal accruals to join the fleet by Q1 FY27 while planning to sell one VLGC "Jag Vishnu" in Q4 FY26.

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