

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,355.3	-120.9	-0.47%
BSE Sensex	83,190.3	-345.8	-0.41%
GIFT Nifty*	25,283.0	-121.0	-0.48%
Dow Jones	44,650.64	192.3	0.43%
S&P 500	6,280.46	17.2	0.27%
NASDAQ	20,630.66	19.33	0.09%
FTSE 100	8,975.66	108.64	1.23%
CAC 40	7,902.25	23.79	0.3%
DAX	24,456.8	-92.8	-0.38%
Shanghai*	3,535.0	+25.34	+0.72%
Nikkei 225*	39,606.97	-39.39	-0.1%
Hang Seng*	24,390.0	+361.63	+1.51%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	67.0	0.2	0.24%
Oil (Brent)	69.1	0.2	0.26%
Gold	3,331.3	8.3	0.25%
Silver	37.2	0.1	0.30%
Copper	9,752.0	117.0	1.21%
Cotton	0.66	-0.02	-2.46%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.22
USD/INR	85.64	-0.04	-0.05
GBP/INR	116.56	0.07	0.06
EUR/INR	100.48	0.11	0.11
DX Index	97.41	-0.14	-0.15

VIX	Value	Change (Pts)	Change (%)
India VIX	11.67	-0.27	-2.26%
S&P 500 VIXApr 24	15.78	-0.16	-1.00%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.309	0.004
US 10-Year Yield	4.350	-0.053

## 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 120 points lower at 25,355 on Thursday.

## Aegis Vopak Terminals

The company acquired ₹428.40 crore LPG terminal from promoter Aegis Logistics via slump sale to support 48,000 MT storage at Pipavav.

## Birla Corporation

The company was declared preferred bidder for 160.39-hectare Tadas Limestone Block-II at 63.5% final price to support Nagaur cement reserves.

## Deepak Fertilisers

The company signed a 5-year LOA with Petronet LNG for 25 TBTU annual regasification at Dahej, Gujarat, to support gas-to-chemicals supply chain.

## HCLTech

The company signed a 10-year deal with Dunedin City Council to modernize IT services and support digital transformation across NZ council operations.

## JSW Infrastructure

The company received Lol for NCR Rail Infra's resolution plan including PFT with 6 lines, 0.2M sq. ft. warehouse and 130-acre land bank.

## Lemon Tree Hotels

The company signed license agreements for 67-room Lemon Tree Premier in Navi Mumbai and 100-room Lemon Tree Hotel in Jalgaon, Maharashtra.

## M&amp;M Financial Services

The company approved ₹100 crore NCD issue via private placement for 1 year 349 days tenure at 7.05% under shareholder-approved borrowing limits.

## Poonawalla Fincorp

The company approved ₹1,500 crore secured, listed NCD issuance under Series D1 FY26 via private placement with ₹750 crore green shoe option.

## Premier Explosives

The company received amended PO from international client increasing value from ₹6.62 crore to ₹18.29 crore for 6-month defence product supply.

## Puravankara

The company signed JDA for 5.5-acre East Bengaluru land with ₹1,000 crore GDV to support 0.83 msf saleable residential development.

## Titagarh Rail Systems

The company approved ₹200 crore preferential issue of 21 lakh warrants at ₹945 each to promoter group for 18-month capex and working capital support.

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