8 October 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,108.30	30.65	0.12%
BSE Sensex	81,926.75	136.63	0.17%
GIFT Nifty*	25,218.00	-6.00	-0.02%
Dow Jones	46,602.98	-91.99	-0.2%
S&P 500	6,714.59	-25.69	-0.38%
NASDAQ	22,788.36	-153.3	-0.67%
FTSE 100	9,483.58	4.44	0.05%
CAC 40	7,974.85	3.07	0.04%
DAX	24,385.78	7.49	0.03%
Shanghai**	3,882.78	20.25	0.52%
Nikkei 225*	48,018.92	68.04	0.14%
Hang Seng*	26,771.50	-186.27	-0.69%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.31	0.25	0.40%
Oil (Brent)	66.01	0.28	0.43%
Gold	4,006.00	22.18	0.56%
Silver	48.27	0.43	0.90%
Copper	10,643.00	33.50	0.32%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.38%
USD/INR	88.77	-0.02	-0.02%
GBP/INR	119.33	0.03	0.02%
EUR/INR	103.56	-0.02	-0.02%
DXY Index	98.86	0.73	0.01%

VIX	Value	Change (Pts)	Change (%)
India VIX	10.05	-0.14	-1.37%
S&P 500 VIX	17.24	0.87	5.31%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.510	-0.010
US 10-Year Yield	4.168	0.012

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 30 points higher at 25,108 on Tuesday.

AIA Engineering
The company's subsidiary Vega Industries Chile SpA received a $32.9 million (₹291 crore) grinding media order from a Chilean copper mine for 18 months.

Balu Forge Industries
The company commenced operations at its Belgaum precision machining unit with 7-Axis and 11-Axis CNC machines, boosting advanced aerospace and defence component production.

Bondada Engineering
The company's subsidiary Bondada Green Engineering received ₹13.74 crore solar project orders from Vishwanath Projects, OM Associates, Max Infra, and JMR Clean Energy.

Container Corporation of India
The company signed a strategic agreement with UltraTech Cement to transport bulk cement via dedicated rail rakes, promoting sustainable logistics.

Gabriel India
The company approved forming a JV with Korea's SK Enmove, investing ₹29.4 crore for a 49% stake to manufacture lubricants, e-fluids, and related products.

KPIT Technologies
The company, through its subsidiary KPIT Technologies (UK), acquired an additional 62.9% stake in Switzerland-based N-Dream AG for €16.35 mn, raising its total holding to 88.9% as part of its plan to reach 90% this year.

Quality Power Electrical Equipments
The company executed a share purchase agreement to acquire 50% stake in Sukrut Electric for ₹5.22 crore, strengthening its electrical equipment business.

Saatvik Green Energy
The company's subsidiary Saatvik Solar Industries received ₹219.62 crore orders from three IPPs/EPCs for supply of solar PV modules.

Shyam Metalics and Energy
The company reported September sales with Sponge Iron 60,654 MT down 28.7% YoY, Aluminium Foil 2,056 MT up 4.1%, Specialty Alloys 17,452 MT up 14.4%.

Waaree Energies
The company completed acquisition of 64% stake in Kotsons for ₹192 crore, making Kotsons its subsidiary and strengthening its business portfolio.

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