22 July 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,187.70	-50.80	-0.21%
BSE Sensex	77,470.11	-238.41	-0.31%
GIFT Nifty*	24,118.00	-51.50	-0.21%
Dow Jones	52,224.60	385.38	0.74%
S&P 500	7,509.20	65.92	0.89%
NASDAQ	25,837.20	329.13	1.29%
FTSE 100	10,585.90	61.15	0.58%
CAC 40	8,363.14	23.03	0.28%
DAX	25,011.35	164.66	0.66%
Shanghai*	3,878.63	14.26	0.37%
Nikkei 225*	67,471.90	1,239.69	1.87%
Hang Seng*	24,924.08	-208.21	-0.83%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	84.91	1.76	2.11%
Oil (Brent)	92.12	1.11	1.22%
Gold	4,127.90	51.50	1.26%
Silver	60.06	0.95	1.60%
Copper	13,855.90	227.40	1.67%
Cotton	0.76	-0.02	-3.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	0.02%
USD/INR	96.31	-0.15	-0.16%
GBP/INR	129.46	-0.38	-0.30%
EUR/INR	109.98	-0.26	-0.24%
DXY Index	101.16	0.18	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.60	-0.38	-2.93%
S&P 500	17.05	-1.60	-8.58%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.79	0.020
US 10-Year Yield	4.63	-0.002

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 51 points lower at 24,188 on Tuesday.

ACME Solar Holdings

The company, through its subsidiary, signed a 25-year PPA with SECI for a 300 MW ISTS-connected wind-solar hybrid project, taking its PPA-signed portfolio to 6,870 MW.

Brigade Enterprises

The company launched Brigade Misty Greens, a premium residential project in Mysuru under a JDA, with revenue potential of over ₹300 crore.

Great Eastern Shipping

The company delivered its 2009-built LR2 product tanker, Jag Lokesh, to the buyer, reducing its owned fleet to 40 vessels with an aggregate capacity of 3.24 million DWT.

Maruti Suzuki India

The company will increase prices across its portfolio by up to ₹30,000 from August 2026, amid a sustained increase in input costs.

MedPlus Health Services

The company approved an investment of ~₹155 crore to set up a food park and concierge health and wellness facility in Hyderabad, including ~₹40 crore and ~₹90 crore capex, respectively.

Royal Orchid Hotels

The company, through its subsidiary, signed a revenue-sharing agreement for the 106-room Laxminarayan Palace Resort, Vadodara, under its Iconiqa Collection, in line with its asset-light strategy.

SEAMEC

The company will acquire the vessel SEAMEC ANANT from HAL Offshore for $70 million, with delivery expected by Aug. 31, 2026.

Viyash Scientific

The company's step-down WOS, Alivira Animal Health, executed an SPA to acquire 100% of Italy-based BioForLife Italia for ~€16.98 million, subject to regulatory approvals.

Zaggle Prepaid Ocean Services

The company approved an investment of up to ₹7.97 crore to acquire up to a 19.9% stake in Unobanc, a digital cross-border payments and remittances platform, with completion in ~90 days.

Zen Technologies

The company received a ₹177.5 crore order from the Ministry of Defence for the upgradation and integration of tank and crew gunnery simulators, with execution over ~1 year.

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