26 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,334.55	115.50	0.48%
BSE Sensex	77,656.09	286.98	0.37%
GIFT Nifty*	24,559.00	+79.0	+0.32%
Dow Jones	53,577.40	160.24	0.30%
S&P 500	7,677.28	24.42	0.32%
NASDAQ	26,151.30	171.11	0.66%
FTSE 100	10,886.20	31.84	0.29%
CAC 40	8,439.20	-13.81	-0.16%
DAX	26,266.14	159.54	0.61%
Shanghai*	3,900.18	10.74	0.28%
Nikkei 225*	66,048.70	192.31	0.29%
Hang Seng*	25,743.00	231.90	0.91%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	80.36	-2.00	-2.43%
Oil (Brent)	86.30	-2.28	-2.57%
Gold	4,717.30	22.80	0.49%
Silver	69.46	0.78	1.13%
Copper	14,423.80	80.95	0.56%
Cotton	0.86	-0.01	-0.93%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.07%
USD/INR	95.74	0.02	0.02%
GBP/INR	130.53	-0.16	-0.12%
EUR/INR	111.68	-0.30	-0.27%
DXY Index	98.93	-0.05	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.08	-0.45	-3.90%
S&P 500	15.45	-0.40	-2.52%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	0.00	0.000
US 10-Year Yield	4.64	0.002

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 115 points higher at 24,335 on Tuesday.

ACME Solar Holdings Ltd.

The company won 300 MW capacity in SECI's FDRE-IX tender at Rs 6.00 per kWh, adding a 1.2 Gwh battery storage pipeline to its portfolio.

Indiabulls Ltd.

The company signed a Gurugram project deal for 10.84 acres and 21 lakh sq ft, with an estimated GDV of Rs 3,700 Cr, launching mid-October 2026.

Larsen & Toubro Ltd.

The company won a major order for three Middle East battery energy storage system projects totaling 6 Gwh capacity.

NBCC Ltd.

The company successfully concluded an e-auction of residential units at Aspire Silicon City, Noida, realizing about Rs 416.53 Cr, with a 1% marketing fee payable.

Nitco Ltd.

The company signed a joint development MOU with HOABL for Alibaug land, with expected consideration of Rs 1,300 to 1,500 Cr over five years.

Puravankara Ltd.

The company signed a joint development agreement for a 7.83-acre Bengaluru land parcel carrying an estimated Rs 1,100 Cr GDV potential.

Sigma Advanced System Ltd.

The company won a 125 million pound, about Rs 1,630 Cr, agreement with Rolls-Royce, following its acquisition of Bromford.

Sudarshan Chemical Industries Ltd.

The company's subsidiary agreed to acquire Clariant's aluminium dyes plant at Muttenz, Switzerland, for CHF 7 million, about Rs 83 Cr, plus inventory, completing around January 2027.

Suzlon Energy Ltd.

The company won a 250 MW wind energy order from Torrent Green Energy, extending their partnership to over 1.3 GW cumulative capacity.

Vinyas Innovative Technologies Ltd.

The company won PCBA supply orders worth Rs 109.78 Cr from domestic and foreign customers, to be executed over 6 to 18 months.

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