30 December 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,942.10	-100.20	-0.38%
BSE Sensex	84,695.54	-345.91	-0.41%
GIFT Nifty*	25,920.00	-46.00	-0.18%
Dow Jones	48,461.93	-249.04	-0.51%
S&P 500	6,905.74	-24.2	-0.35%
NASDAQ	23,474.35	-118.75	-0.5%
FTSE 100	9,866.53	-4.15	-0.04%
CAC 40	8,112.02	8.44	0.1%
DAX	24,351.12	11.06	0.05%
Shanghai*	3,962.64	-2.64	-0.07%
Nikkei 225*	50,420.50	-106.42	-0.21%
Hang Seng*	25,708.50	73.27	0.29%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	57.84	-0.24	-0.41%
Oil (Brent)	61.78	0.03	0.05%
Gold	4,366.10	22.50	0.52%
Silver	72.94	2.48	3.52%
Copper	12,306.00	53.00	0.43%
Cotton	0.64	0.00	0.06%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	0.04%
USD/INR	89.96	0.10	0.11%
GBP/INR	121.25	0.09	0.07%
EUR/INR	105.93	0.18	0.17%
DXY Index	98.05	0.00	0.00%

VIX	Value	Change (Pts)	Change (%)
India	9.72	0.57	6.23%
S&P 500	14.20	0.6	4.41%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.573	0.006
US 10-Year Yield	4.116	-0.035

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 100 points lower at 25,942 on Monday.

Bharat Electronics

The company received additional orders worth ₹569 crore covering radars communication equipment fire control systems simulators software spares and related services.

Ceigall India

The company’s subsidiary received an LOA from MPRDC for the Indore–Ujjain four-lane HAM highway project with bid cost ₹1,089 crore.

Hindalco Industries

The company’s subsidiary Novelis entered a subscription agreement to issue 50 lakh shares to AV Minerals for $750 million.

Lemon Tree Hotels

The company’s subsidiary executed an HOA for a 228-room Lemon Tree Suites hotel in Tirupati to be operated under a licence agreement.

Lupin

The company signed an exclusive licensing, supply and distribution agreement with Gan & Lee to commercialize the GLP-1 agonist Bofanglutide in India.

NTPC Green Energy

The company declared commercial operation of 13.98 MW from Khavda-I Solar PV Project in Gujarat raising group installed capacity to 8,010.28 MW.

Praveg

The company signed a three-year inventory agreement with Mahindra Holidays for 25 rooms at Praveg Atoll Lakshadweep on a floating basis.

Rail Vikas Nigam

The company emerged L1 from East Coast Railway for setting up a 200-wagon POH workshop at Kantabanji with project cost ₹201.23 crore.

SEPC

The company received a ₹230 crore turnkey mining infrastructure order from MOIL for design construction and commissioning of a vertical shaft at Chikla Mine.

VA Tech Wabag

The company secured a Letter of Award from Saudi Water Authority for EPC of a 50 MLD BWRO plant at Aljouf, Saudi Arabia.

Waaree Energies

The company’s subsidiary commenced operations at a 3.05 GW solar inverter manufacturing facility in Sarodhi Valsad Gujarat.

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