

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,460.3	-92.2	-0.41%
BSE Sensex	74,115.2	-217.4	-0.29%
GIFT Nifty*	22,422.0	-72.5	-0.32%
Dow Jones	41,911.7	-890.0	-2.08%
S&P 500	5,614.6	-155.6	-2.7%
NASDAQ Comp.	17,468.3	-727.9	-4.00%
FTSE 100	8,600.2	-79.7	-0.92%
CAC 40	8,047.6	-73.2	-0.9%
DAX	22,621.0	-388.0	-1.69%
Shanghai*	3,355.1	-11.1	-0.33%
Nikkei 225*	36,173.2	-855.1	-2.31%
Hang Seng*	23,783.5	-447.8	-1.85%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	66.0	0.1	0.15%
Oil (Brent)	69.2	0.0	0.04%
Gold	2,895.3	9.8	0.34%
Silver	32.2	0.1	0.28%
Copper	9,546.7	-116.5	-1.21%
Cotton	0.66	0.00	-0.42%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.08	0.00	-0.10
USD/INR	87.33	0.45	0.52
GBP/INR	112.74	0.33	0.29
EUR/INR	94.76	0.39	0.42
DX Index	103.73	-0.11	-0.11

VIX	Value	Change (Pts)	Change (%)
India VIX	13.99	0.51	3.79%
S&P 500 VIXApr 24	27.86	4.49	19.21%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.703	0.015
US 10-Year Yield	4.257	-0.013

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 92 points lower at 22,460 on Monday.

Anupam Rasayan:

The company signed a \$106 million (₹922 crore) 10-year LOI with a leading Korean MNC for high-performance niche chemical supply from FY26.

Ashoka Buildcon:

The company received an LoA from MSETCL for a ₹311.92 crore project to establish a 400/220 KV substation and transmission lines in Maharashtra.

Bharat Electronics:

The company secured additional orders worth ₹843 crore for RF seekers, vessel and air traffic management systems, radar upgrades, and services.

Godrej Consumer Products:

The company launched its first integrated greenfield plant in Chengalpattu, Tamil Nadu, with a ₹515 crore investment over five years.

HEG:

The company's associate Bhilwara Energy approved a fund raise of ₹500 crore led by Singularity AMC to accelerate its energy transition businesses.

Hindustan Zinc:

The company approved issuing unsecured, redeemable, rated, listed NCDs of ₹500 crore via private placement in three separately transferable and redeemable parts.

Infosys:

The company's subsidiary Finacle implemented its Treasury solution for Chola, centralizing treasury management on a unified web-based platform to enhance trading, risk management, and operations.

MSTC:

The company received a work order from Coal India to act as an e-auction service provider for coal and coal products for two years.

Nazara Technologies:

The company's subsidiary Nodwin Gaming extended a guarantee of EUR 1.56 million (~₹14.73 crores) for Freaks 4U Gaming's loan from FRE GmbH & Co. KG.

SJVN:

The company signed an MoU with Chhattisgarh Govt. and CSPGCL for a ₹9,500 crore 1,800 MW Pumped Storage Project at Kotpali, Balrampur.

Sun Pharma:

The company will acquire Nasdaq-listed Checkpoint Therapeutics, strengthening its oncology portfolio with FDA-approved UNLOXCYT for advanced cutaneous squamous cell carcinoma treatment.

Syngene International:

The company approved an additional investment of \$56 million in its wholly owned US subsidiary Syngene USA Inc for a biologics facility acquisition.

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