

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,328.5	289.2	1.20%
BSE Sensex	80,218.4	1,005.8	1.27%
GIFT Nifty*	24,495.0	+69.0	+0.28%
Dow Jones	40,227.59	114.09	0.28%
S&P 500	5,528.75	3.54	0.06%
NASDAQ Comp.	17,366.13	-16.81	-0.1%
FTSE 100	8,417.34	2.09	0.02%
CAC 40	7,573.76	37.5	0.5%
DAX	22,271.7	+29.22	+0.13%
Shanghai*	3,290.7	+2.25	+0.07%
Nikkei 225*	35,839.99	134.25	0.38%
Hang Seng*	21,971.96	-8.78	-0.04%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.0	0.1	0.13%
Oil (Brent)	65.7	0.1	0.09%
Gold	3,329.3	-12.4	-0.37%
Silver	33.2	0.0	0.03%
Copper	9,365.5	1.5	0.02%
Cotton	0.67	0.00	-0.03%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	0.35
USD/INR	85.03	-0.42	-0.49
GBP/INR	113.46	-0.18	-0.16
EUR/INR	96.52	-0.43	-0.44
DX Index	99.59	0.12	0.12

VIX	Value	Change (Pts)	Change (%)
India VIX	16.94	-0.22	-1.28%
S&P 500 VIXApr 24	25.15	0.31	1.25%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.387	0.019
US 10-Year Yield	4.262	-0.043

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 289 points higher at 24,328 on Monday.

Avenue Supermarts

The company opened a new store in Rewa, Madhya Pradesh, taking the total store count to 418.

Coforge

The company approved the sale of 100% stake in step-down subsidiary Coforge Advantage Go to Sapiens UK for GBP 43 million.

Deepak Fertilisers and Petrochemicals

The company's subsidiary DMSL allotted ₹800 crore CCDs on private placement to Tata Capital (₹500 crore) and SCM Growth LLP (₹300 crore).

KPIT Technologies

The company reported Q4 results with sales up +16% YoY to ₹1,528 crore (+3.4% QoQ) EBITDA up +18.4% YoY to ₹323 crore (+3.4% QoQ) and net profit up +47.5% YoY to ₹245 crore (+30.9% QoQ).

Nazara Technologies

The company approved sale of the entire stake in Openplay Technologies to Moonshine Technology via non-cash consideration through postal ballot.

RateGain Travel Technologies

The company launched UNO VIVA, the first CRS-integrated AI voice agent for hotels to enhance reservation management and guest experience.

Royal Orchid Hotels

The company signed a 70-key upscale lifestyle hotel in Mussoorie, spread across 7 acres, offering suites, restaurants, wedding zones, wellness facilities, and conference spaces, increasing its Uttarakhand presence to 6 hotels.

Sonata Software

The company secured a \$73 million five-year deal with a major US-based TMT player to drive AI-led modernization and digital transformation.

UltraTech Cement

The company reported Q4 results with sales up +7% YoY to ₹20,856 crore (+30% QoQ), EBITDA up +13% YoY to ₹4,725 crore (+58% QoQ) and net profit up +19% YoY to ₹2,682 crore (+87% QoQ) and declared a dividend of ₹77.50 per share.

Wipro

The company secured a five-year contract from Vorwerk to manage and transform its IT landscape including infrastructure consolidation and cyber security enhancement.

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