25 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,219.05	-32.95	-0.14%
BSE Sensex	77,369.11	-171.72	-0.22%
GIFT Nifty*	24,160.50	-50.50	-0.21%
Dow Jones	53,417.20	140.15	0.26%
S&P 500	7,652.86	-21.51	-0.28%
NASDAQ	25,980.20	-200.26	-0.77%
FTSE 100	10,854.30	37.76	0.35%
CAC 40	8,453.01	-31.42	-0.37%
DAX	26,106.60	-29.96	-0.11%
Shanghai*	3,869.57	-12.44	-0.32%
Nikkei 225*	65,399.60	-128.51	-0.20%
Hang Seng*	25,453.00	-64.34	-0.25%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	85.74	0.73	0.86%
Oil (Brent)	92.78	0.61	0.66%
Gold	4,709.00	11.20	0.24%
Silver	68.29	-0.30	-0.44%
Copper	14,342.85	52.00	0.36%
Cotton	0.84	-0.03	-3.98%

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	99.02	0.18	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.53	0.33	2.95%
S&P 500	15.85	0.72	4.76%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	0.00	0.000
US 10-Year Yield	4.72	0.012

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 33 points lower at 24,219 on Monday.

Allied Blenders and Distillers Ltd.

The company's ABD brand launched local production of Officer's Choice Blue whisky in Malaysia on August 24, 2026.

Ceigall India Ltd.

The company's joint venture with Sushee won a MoRTH Letter of Award for the ₹704.70 Cr Lada-Sarli road project in Arunachal Pradesh.

Garden Reach Shipbuilders & Engineers Ltd.

The company announced a ₹2,670 Cr capacity expansion across its Raichak, Shalimar and Damodar manufacturing facilities.

Godrej Industries Ltd.

The company's group signed an MoU with the Haryana government for a ₹20,000 Cr investment, targeting creation of 40,000 jobs by FY28.

Larsen & Toubro Ltd.

The company signed an ultra-mega gas compression EPC contract in the Middle East, including construction of two 230 kV substations.

NTPC Green Energy Ltd.

The company's subsidiary NTPC REL won 500 MW in SECI's FDRE-IX tender at ₹6.00 per kWh, with the auction concluding on August 21, 2026.

Power Grid Corporation of India Ltd.

The company was declared successful bidder for the Jam Khambhaliya-Jamnagar transmission project under tariff-based competitive bidding, with the LoI received on August 21, 2026.

Ratnamani Metals & Tubes Ltd.

The company's subsidiary received export orders worth USD 286 million for spools and hangers, to be executed over two to three years.

Tata Power Company Ltd.

The company's renewables arm commissioned a 190.5 MW FDRE project in Rajasthan, part of a larger 460 MW project under development.

Zee Entertainment Enterprises Ltd.

The company allotted 20.94 Cr fully convertible warrants to Sunbright Mauritius on a preferential basis, raising ₹659.76 Cr.

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