14 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,395.85	-40.10	-0.16%
BSE Sensex	78,079.96	113.61	0.15%
GIFT Nifty*	24,431.50	-28.00	-0.11%
Dow Jones	53,840.00	69.72	0.13%
S&P 500	7,798.99	50.49	0.65%
NASDAQ	26,803.00	214.54	0.81%
FTSE 100	10,772.70	-60.48	-0.56%
CAC 40	8,650.56	-24.38	-0.28%
DAX	26,299.74	-31.33	-0.12%
Shanghai*	3,932.00	5.04	0.13%
Nikkei 225*	68,882.30	573.69	0.84%
Hang Seng*	25,412.00	-28.18	-0.11%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	80.90	-0.35	-0.43%
Oil (Brent)	86.65	-0.42	-0.48%
Gold	4,370.80	-49.60	-1.12%
Silver	63.98	-1.02	-1.57%
Copper	14,284.50	-90.80	-0.63%
Cotton	0.82	0.00	-0.04%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	0.04%
USD/INR	95.44	0.10	0.10%
GBP/INR	128.77	-0.05	-0.04%
EUR/INR	110.09	0.12	0.11%
DXY Index	99.9	-0.06	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.42	-0.27	-2.31%
S&P 500	14.63	0.08	0.55%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	0.00	0.000
US 10-Year Yield	4.65	0.006

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 40 points lower at 24,396 on Thursday.

Aditya Birla Real Estate Ltd.

The company entered Navi Mumbai's redevelopment market via a Vashi project targeting ₹2,600 Cr revenue, and completed its pulp and paper business sale to ITC on August 1, 2026.

Ashoka Buildcon Ltd.

The company received an LOI from REC for the Sakoli 400/220/132 kV transmission project, earning ₹126.54 Cr annually over a 35-year concession period.

Aurionpro Solutions Ltd.

The company won a ~₹100 Cr order to build AI-ready digital infrastructure for a hyperscale data centre in Navi Mumbai.

Black Box Ltd.

The company won a US$131 million hyperscaler data centre order, posted Q1 FY27 revenue of ₹1,719 Cr and PAT ₹56 Cr, and acquired 2S for ₹496.59 Cr.

Jindal Stainless Ltd.

The company commissioned a 1.2 MTPA melt shop in Indonesia and reported FY26 revenue of ₹42,955 Cr with PAT of ₹3,185 Cr.

Larsen & Toubro Ltd.

The company secured a mega order with Together AI to build India's largest NVIDIA B300 AI Factory in Chennai.

Max Healthcare Institute Ltd.

The company posted Q1 FY27 revenue up 16% to ₹2,982 Cr, PAT ₹357 Cr, EBITDA ₹704 Cr, completed KHL and YPPL acquisitions, and approved ₹425 Cr Vaishali expansion.

NBCC (India) Ltd.

The company won a ₹234.78 Cr PMC work order from ITBP for infrastructure development at 28 Border Out Posts in Ladakh.

Oswal Pumps Ltd.

The company received a Letter of Award from NBPDCL for a 20 MW rooftop solar project in Bihar, worth about ₹78 Cr.

Saatvik Green Energy Ltd.

The company's subsidiary accepted a ₹476 Cr domestic order from Vikran Engineering for solar PV modules, with execution by March 2027.

Tega Industries Ltd.

The company completed its Molycop acquisition on June 1, 2026, adding ₹1,291.64 Cr in revenue to consolidated results.

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