25 August 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,870.1	-213.7	-0.85%
BSE Sensex	81,306.9	-693.9	-0.85%
GIFT Nifty*	24,946.5	+67.5	+0.27%
Dow Jones	45,631.74	846.24	1.89%
S&P 500	6,466.91	96.74	1.52%
NASDAQ	21,496.53	396.22	1.88%
FTSE 100	9,321.40	12.2	0.13%
CAC 40	7,969.69	31.4	0.4%
DAX	24,363.1	69.8	0.29%
Shanghai*	3,871.3	+45.49	+1.19%
Nikkei 225*	42,915.56	282.27	0.66%
Hang Seng*	25,875.0	+535.86	+2.11%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.8	0.0	0.06%
Oil (Brent)	67.8	0.0	0.03%
Gold	3,362.7	-9.4	-0.28%
Silver	38.9	0.0	0.05%
Copper	9,643.0	32.0	0.33%
Cotton	0.67	0.00	0.62%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.01	0.94
USD/INR	87.52	0.25	0.29
GBP/INR	117.41	-0.19	-0.17
EUR/INR	101.50	-0.21	-0.20
DXY Index	97.95	-0.68	-0.01

VIX	Value	Change (Pts)	Change (%)
India VIX	11.70	0.32	2.81%
S&P 500	14.22	-2.38	-14.34%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.528	0.029
US 10-Year Yield	4.312	0.014

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 213 points lower at 24,870 on Friday.

Adani Enterprises

The company's subsidiary Mundra Synenergy incorporated a step-down wholly owned unit CG Syn-Gas & Chemicals in India for chemical manufacturing operations.

Ashoka Buildcon

The company received ₹499.95 crore LoA from North Western Railway for 24-month electric traction system upgrade and OHE modification project in Jaipur Division.

Brigade Enterprises

The company launched Brigade Lakecrest, a 9.33 lakh sq. ft joint development project on Old Madras Road, Bengaluru, with revenue potential of over ₹950 crore and 604 premium residences.

CEAT

The company signed a $171 million agreement with Sri Lanka's BOI to expand Off-Highway Tyres and tracks manufacturing for global exports.

HDB Financial Services

The company allotted 51,000 NCDs worth ₹510 crore on private placement, proposed for BSE listing with 8.33% annual coupon.

IRCON

The company received ₹510.46 crore LOA from Meghalaya Infrastructure Development & Finance Corporation for 36-month EPC work constructing eight Eklavya Model Residential Schools.

NTPC

The company declared commercial operation of 49.125 MW at Khavda Solar Project under 450 MW Hybrid Tranche V, taking group capacity to 83,291 MW.

Premier Energies

The company commenced operations of a 1.2 GW N-Type G12R solar cell line and launched 620 W DCR TOPCon modules for high-efficiency solar solutions.

RailTel

The company received a ₹13.16 crore PMC order from Rajasthan Skill & Livelihoods Development Corporation for project execution till August 2027.

Titagarh Rail Systems

The company received ₹91.12 crore LOA from Banaras Locomotive Works for complete shell assembly of WAG-9HC locomotives.

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