6 August 2026

# Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

| Indices | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| Nifty 50 | 24,624.65 | 9.75 | 0.04% |
| BSE Sensex | 78,581.00 | 152.05 | 0.19% |
| GIFT Nifty* | 24,693.50 | +59.0 | +0.24% |
| Dow Jones | 54,349.10 | 263.24 | 0.49% |
| S&P 500 | 7,723.55 | -12.97 | -0.17% |
| NASDAQ | 26,363.40 | -221.55 | -0.83% |
| FTSE 100 | 10,888.30 | 8.92 | 0.08% |
| CAC 40 | 8,669.30 | 2.67 | 0.03% |
| DAX | 26,126.30 | -76.05 | -0.29% |
| Shanghai* | 3,885.95 | 7.52 | 0.19% |
| Nikkei 225* | 65,362.40 | -938.09 | -1.41% |
| Hang Seng* | 25,472.57 | -443.26 | -1.71% |

***As at 8.00 am***

| Commodity | Price (USD) | Change (Pts) | Change (%) |
|---|---|---|---|
| Oil (WTI) | 75.51 | 0.29 | 0.39% |
| Oil (Brent) | 79.85 | 0.40 | 0.50% |
| Gold | 4,346.90 | 41.70 | 0.97% |
| Silver | 62.50 | 0.21 | 0.34% |
| Copper | 14,167.25 | -22.75 | -0.16% |
| Cotton | 0.80 | -0.02 | -1.98% |

| Currency | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| EUR/USD | 1.15 | 0.00 | 0.06% |
| USD/INR | 95.12 | -0.27 | -0.28% |
| GBP/INR | 128.11 | -0.10 | -0.08% |
| EUR/INR | 109.78 | 0.02 | 0.01% |
| DXY Index | 99.67 | -0.20 | 0.00% |

| VIX | Value | Change (Pts) | Change (%) |
|---|---|---|---|
| India | 12.06 | -0.13 | -1.07% |
| S&P 500 | 15.81 | -0.69 | -4.18% |

| Indicators | Value (%) | Change (Bps) |
|---|---|---|
| India 10-Year Yield | 6.77 | -0.040 |
| US 10-Year Yield | 4.62 | -0.002 |

## 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 10 points higher at 24,625 on Wednesday.**

### Apollo Micro Systems

The company secured orders worth ~₹213.4 crore from DRDO, defence PSUs, and private sector customers.

### Gland Pharma

The company entered into a long-term CDMO partnership with Neuland Laboratories to establish a sterile API manufacturing suite at its Visakhapatnam facility, adding ~1,400 kg annual capacity.

### JK Lakshmi Cement

The company will invest up to ₹20.5 crore for a 26% stake in STLC RE 1, an SPV developing a 29 MW AC solar power plant with 28 MWh BESS for its Sirohi cement plant under the group captive route.

### Lemon Tree Hotels

The company signed a franchise agreement for a 24-room Keys Lite hotel in Manali, expanding its Himachal Pradesh portfolio to 11 hotels.

### NBCC

The company secured PMC work orders worth ~₹801 crore from Reserve Bank of India (~₹780 crore) and Odisha School Education Programme Authority (~₹21 crore).

### Ola Electric

The company signed an MoU with Axis Energy for potential deployment of up to 20 GWh BESS by 2032, including ramp-up to 5 GWh annually from 2028, under its upcoming utility-scale energy storage platform.

### SEPC

The company received a ₹854.6 crore order from SAIL-ISP Burnpur for Pellet Plant BOP, including civil and structural works for the 4.08 MTPA crude steel expansion project, with execution over 32 months.

### Sterlite Technologies

The company secured a ~₹1,840 crore international long-term contract to supply high-density optical fibre cables over CY27-29.

### Urban Company

The company launched the Native M3 Pro water purifier at ₹22,000+, adding a premium product to its Native home solutions portfolio.

### Waaree Renewable Technologies

The company secured a turnkey EPC order from Solaris Horizon Energy, a Waaree Energies subsidiary, for a 210 MWp (150 MWac) ground-mounted solar project, with completion targeted in FY28.

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