17 September 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,217.60	99.00	0.43%
BSE Sensex	74,336.45	332.63	0.45%
GIFT Nifty*	23,223.50	-43.50	-0.19%
Dow Jones	51,461.90	-631.21	-1.21%
S&P 500	7,551.81	-33.92	-0.45%
NASDAQ	25,978.40	-3.15	-0.01%
FTSE 100	10,688.50	30.34	0.28%
CAC 40	8,140.59	50.31	0.62%
DAX	25,537.75	135.47	0.53%
Shanghai*	3,874.60	-17.00	-0.44%
Nikkei 225*	63,991.20	68.19	0.11%
Hang Seng*	24,417.00	-296.78	-1.20%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	102.22	-0.21	-0.21%
Oil (Brent)	105.72	-0.11	-0.10%
Gold	4,329.60	-57.90	-1.32%
Silver	63.75	-1.17	-1.81%
Copper	14,225.85	181.00	1.29%
Cotton	0.80	-0.01	-0.81%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.07%
USD/INR	95.95	-0.02	-0.02%
GBP/INR	129.24	-0.12	-0.09%
EUR/INR	110.73	0.01	0.01%
DXY Index	100.32	0.66	0.01%

VIX	Value	Change (Pts)	Change (%)
India	13.17	-0.27	-2.01%
S&P 500	17.71	0.51	2.97%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.06	-0.020
US 10-Year Yield	5.00	-0.008

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 99 points higher at 23,218 on Wednesday.

ACME Solar
The company commissioned 66.68 MW solar and 300 MWh BESS capacity in Bikaner, Rajasthan, with total operational capacity reaching ~3,057 MW and 4.16 GWh, respectively.

Exide Industries
The company entered a long-term strategic cooperation with Germany's ExCom GmbH to market industrial battery and energy storage solutions across the EEA, initially covering traction and stationary batteries.

Fortis Healthcare
The company signed a 29-year healthcare services agreement for a 400+ bed super-specialty hospital in Ashok Vihar, Delhi, including a ₹567 crore loan to the hospital-owning society.

Juniper Hotels
The company approved acquisition of Novotel Imagicaa in Khopoli for ₹248 crore, comprising 287 rooms across ~11 acres, with completion targeted by Mar'27.

Krsnaa Diagnostics
The company signed a 15-year concession agreement with Punjab Health Systems Corporation to develop and operate PET-CT facilities across 4 government hospitals in Punjab under DBFOT PPP model.

Mazagon Dock Shipbuilders
The company signed an MoU to participate as Anchor Shipyard in the proposed greenfield shipbuilding cluster at Dighi, Maharashtra, with planned capacity of at least 1.2mn GT annually.

Park Medi World
The company entered a 28-year O&M agreement for a 300-bed multi-super-speciality hospital in Kanpur, with operations effective by Apr'27 and renovation and re-equipment before commissioning.

Praj Industries
The company signed an agreement with Gevo for exclusive commercialisation of Bio-IBA technology in India and is establishing a commercial demonstration plant for an OMC.

Rainbow Children's Medicare
The company commenced operations at its 50-bed women's and children's hospital in Guntur, Andhra Pradesh.

Royal Orchid Hotels
The company launched Regenta Magnus in Pune with 66 keys, with 39 additional rooms planned by Dec'26, taking total inventory to 105 keys.

Saatvik Green Energy
The company secured a ₹1,041.63 crore SECI order for supply of 600 MWp solar PV modules, with execution by Dec'27.

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