13 July 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,206.90	244.10	1.02%
BSE Sensex	77,569.39	827.57	1.08%
GIFT Nifty*	24,048.50	-186.00	-0.77%
Dow Jones	52,637.00	149.60	0.29%
S&P 500	7,575.39	31.75	0.42%
NASDAQ	26,281.60	74.72	0.29%
FTSE 100	10,497.30	24.84	0.24%
CAC 40	8,338.97	12.35	0.15%
DAX	25,067.09	-51.18	-0.20%
Shanghai*	3,965.84	-30.33	-0.76%
Nikkei 225*	67,412.40	-1,145.30	-1.67%
Hang Seng*	24,343.50	168.37	0.70%

***As at 8.00 am**

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	74.54	3.13	4.38%
Oil (Brent)	79.27	3.26	4.29%
Gold	4,081.40	-32.30	-0.79%
Silver	58.87	-1.30	-2.15%
Copper	13,351.50	-4.90	-0.04%
Cotton	0.80	0.00	-0.20%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.15%
USD/INR	95.32	-0.07	-0.07%
GBP/INR	127.83	-0.09	-0.07%
EUR/INR	108.93	-0.10	-0.09%
DXY Index	101.14	0.23	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.25	-1.11	-8.31%
S&P 500	15.03	-0.81	-5.11%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.72	-0.040
US 10-Year Yield	4.59	0.018

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 244 points higher at 24,207 on Friday.

Adani Enterprises
The company partnered with Dioxycle to establish a pilot facility for low-carbon formic acid production using captured CO_2 and renewable electricity, with phased scale-up to commercial manufacturing.

HFCL
The company secured an export order worth ~USD 51.98 million (~₹495.80 crore) for optical fibre cable-based data centre connectivity solutions, with execution by December 2026.

HUDCO
The company signed an MoU with the Government of Odisha to provide ~₹1,00,000 crore in term loans over five years for urban infrastructure and housing projects.

Ion Exchange (India)
The company secured a $52.83 million (~₹503 crore) international contract from Hyundai Engineering & Construction for the supply of filtration units in the Middle East, with execution over ~18 months.

JBM Auto
The company launched the next-generation GALAXY electric luxury coach, with the platform demonstrating operations of over 900 km/day and available in seater, sleeper, and sleeper plus seater variants.

JSW Energy
The company's subsidiary, JSW Energy PSP Eleven, secured a ₹443.74 crore order from Bondada Renewable Energy to supply 200 MW or 400 MWh BESS and PCS solutions.

NBCC (India)
The company's subsidiary, HSCL, secured project management consultancy orders worth ~₹158.95 crore for educational infrastructure projects in Odisha.

Power Grid Corporation of India
The company was declared the successful bidder under TBCB for the Transmission System for Integration of Krishnagiri REZ Phase I on a BOOT basis.

RailTel Corporation
The company received a ₹18.54 crore work order from the Uttar Pradesh Information Technology and Electronics Department for the supply, installation, and maintenance of Atal Tinkering Labs in schools, with execution over ~16 months.

RITES
The company, in a consortium, secured a ₹79.22 crore consultancy order from Patna Metro Rail Corporation for the Patna Metro Rail project implementation, with execution over ~68 months.

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