7 October 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,077.7	183.4	0.74%
BSE Sensex	81,790.1	583.0	0.72%
GIFT Nifty*	25,187.0	+21.0	+0.08%
Dow Jones	46,694.97	-63.31	-0.14%
S&P 500	6,740.28	24.49	0.36%
NASDAQ	22,941.67	161.16	0.71%
FTSE 100	9,479.14	-12.11	-0.13%
CAC 40	7,971.78	-109.76	-1.36%
DAX	24,378.3	-0.5	0.00%
Shanghai**	3,882.8	+20.25	+0.52%
Nikkei 225*	48,222.82	278.06	0.58%
Hang Seng**	26,957.8	-183.2	-0.67%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.8	0.1	0.16%
Oil (Brent)	65.6	0.1	0.12%
Gold	3,964.4	3.3	0.08%
Silver	48.5	-0.1	-0.21%
Copper	10,609.5	72.0	0.68%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	-0.01	-0.49
USD/INR	88.79	0.01	0.01
GBP/INR	119.31	-0.14	-0.12
EUR/INR	103.58	-0.63	-0.60
DXY Index	98.17	0.46	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.19	0.13	1.29%
S&P 500 VIXApr 24	16.37	-0.28	-1.68%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.520	0.005
US 10-Year Yield	4.156	0.070

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 183 points higher at 25,077 on Monday.

Amber Enterprises India
The company's subsidiary ILJIN acquired 100% stake in ILJIN Holding for NIS 15.79 crore to support Unitronics acquisition and international expansion.

Astral
The company commenced commercial production at its new Kanpur plant, strengthening its manufacturing capacity and supporting future business growth.

Awfis Space Solutions
The company launched a new 50,000 sq. ft. centre in Powai, Mumbai, expanding presence to 35 centres and serving diverse enterprise clients.

Bharti Airtel
The company won a multi-year IRSOC contract to design, implement, and operate a 24x7 cybersecurity ecosystem for Indian Railways' digital infrastructure.

Bondada Engineering
The company received a ₹63.87 crore LOI from Bihar Government for Phase-IV Mukhyamantri Gramin Solar Street Light Yojana across three districts.

Brigade Enterprises
The company signed a JDA for a premium residential project on 6.6 acres in West Chennai with an estimated GDV of ₹1,000 crore.

Dilip Buildcon
The company, through DBL-APMPL JV, received LOA for developing a 100 MW captive solar project to supply power to Madhya Pradesh Jal Nigam.

Havells India
The company's subsidiary Havells International Inc acquired Salesmark Ventures' 20% stake in Havells HVAC LLC, making it a wholly-owned subsidiary.

Jindal Stainless
The company launched its first stainless steel fabrication unit in Mumbai with ₹125 crore investment, targeting 18,000 tonnes annual capacity for bridge infrastructure.

JNK India
The company received an ultra-mega order from JNK Global, Korea for support services and supplies for a refinery Cracker Furnace Package in India.

KEC International
The company secured new orders worth ₹1,102 crore across civil, transportation, T&D, and cables businesses in India and overseas markets.

KRN Heat Exchanger and Refrigeration
The company's subsidiary KRN HVAC acquired SRSPL's Bus Air-Conditioning division, strengthening its automotive HVAC presence and enhancing revenue, profitability, and market reach.

PNC Infratech
The company's subsidiaries received the appointed date from NHAI for two HAM projects in Bihar with 730-day construction and 15-year operation periods.

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