18 February 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,725.40	42.65	0.17%
BSE Sensex	83,450.96	173.81	0.21%
GIFT Nifty*	25,758.00	+48.0	+0.19%
Dow Jones	49,533.19	32.26	0.07%
S&P 500	6,843.22	7.05	0.1%
NASDAQ	22,578.38	31.71	0.14%
FTSE 100	10,556.17	82.48	0.79%
CAC 40	8,361.46	44.96	0.54%
DAX	24,998.40	197.49	0.80%
Shanghai**	4,082.07	-51.95	-1.26%
Nikkei 225*	57,279.47	712.98	1.26%
Hang Seng**	26,705.94	138.82	0.52%

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

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.01	0.12	0.19%
Oil (Brent)	67.51	0.15	0.22%
Gold	4,904.44	25.23	0.52%
Silver	73.53	0.15	0.20%
Copper	12,561.00	-196.00	-1.54%
Cotton	0.61	0.00	-0.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	-0.16%
USD/INR	90.68	0.02	0.02%
GBP/INR	123.24	-0.46	-0.37%
EUR/INR	107.42	-0.13	-0.12%
DXY Index	97.23	0.14	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.67	-0.66	-4.95%
S&P 500	20.29	-0.31	-1.50%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.66	-0.01
US 10-Year Yield	4.05	-0.01

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 42 points higher at 25,725 on Tuesday.

Bharti Airtel
The company's arm, Airtel Money, receives RBI approval for registration as a Type-II NBFC.

BHEL
The company received an LOA from SAIL for execution of the CPP package for IISCO Steel Plant’s 4.08 MTPA expansion on a turnkey basis, valued at ₹1,200–1,500 crore, to be commissioned within 39 months.

Dilip Buildcon
The company declared L1 bidder for ₹668 crore EPC project for flood protection embankment on river Narmada in Bharuch Gujarat with 24-month completion period.

GPT Infraprojects
The company in JV with RVNL secured a Northern Railway contract for new rail cum road bridge over River Ganga at Varanasi with 40% share of ₹480.54 crore to be executed in 1,461 days.

KNR Constructions
The company received LOA for ₹2,163 crore four lane elevated corridor project on ECR in Tamil Nadu under HAM with 1,095 days construction period and 5 year O&M.

Marine Electricals
The company received orders worth ₹19.09 crore excluding taxes from Crescon Projects for supply of power distribution units to be executed over 12 months.

NBCC India
The company received new work orders worth ~₹104.95 crore including ₹14.72 crore from RSP SAIL for infra and hospital upgradation works and ₹90.23 crore from NLC India for PMC services for R&R colony project.

Strides Pharma
The company through its WOS Arco Lab acquired remaining 50% stake in Neviton for €2 mn making it a wholly owned subsidiary, strengthening its IT and engineering services capabilities.

Transport Corporation of India
The company partnered with FLYING WHALES for deployment of the LCA60T 60T heavy lift rigid airship in India to enable decarbonized heavy cargo logistics with focus on defense energy infra and remote connectivity use cases.

Ventive Hospitality
The company through subsidiary completed 100% acquisition of Finest VN Business Park for ₹59.83 crore in cash gaining exclusive Soho House expansion rights in India.

Zydus Lifesciences
The company launched PEPAIR India’s first affordable OPEP device priced at ₹990 per unit targeting COPD asthma and bronchiectasis patients under agreement with AeroDel expanding its respiratory portfolio.

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