

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,161.60	-53.35	-0.23%
BSE Sensex	73,832.55	-150.63	-0.20%
GIFT Nifty*	23,460.50	+58.0	+0.25%
Dow Jones	50,848.80	929.97	1.86%
S&P 500	7,394.30	127.31	1.75%
NASDAQ	25,809.70	640.16	2.54%
FTSE 100	10,303.90	49.07	0.48%
CAC 40	8,200.80	38.97	0.48%
DAX	24,209.71	14.40	0.06%
Shanghai*	4,039.98	52.96	1.33%
Nikkei 225*	66,577.30	2,360.00	3.68%
Hang Seng*	24,587.03	337.73	1.39%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	86.84	-0.87	-0.99%
Oil (Brent)	89.39	-0.99	-1.10%
Gold	4,214.10	100.10	2.43%
Silver	67.16	3.16	4.94%
Copper	13,417.65	48.30	0.36%
Cotton	0.73	0.00	0.63%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	0.09%
USD/INR	95.32	-0.04	-0.04%
GBP/INR	127.64	-0.02	-0.01%
EUR/INR	110.14	-0.10	-0.09%
DXY Index	99.8	-0.32	0.00%

VIX	Value	Change (Pts)	Change (%)
India	15.61	-0.02	-0.13%
S&P 500	19.44	-2.78	-12.51%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.90	-0.020
US 10-Year Yield	4.48	0.010

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 53 points lower at 23,161 on Thursday.

Adani Enterprises

The company's Joint Venture, AdaniConneX, completed the 100% acquisition of MBEL for a consideration of ₹765 crore.

Anupam Rasayan India

The company commercialised ETFA (Ethyl Trifluoroacetate) production using its proprietary continuous flow technology, becoming the first company globally to manufacture ETFA at commercial scale through this process.

Astral

The company's wholly owned subsidiary Astral Chemie acquired a 60% stake in Differentiated and Sustainable Solutions LLP (DSS) for ₹39.11 crore, strengthening its presence in specialty chemicals and advanced materials.

Avanti Feeds Limited

The company approved an investment of €400,000 as subscription to share capital in Sealuxe B.V., Netherlands, a wholly owned subsidiary.

Bharat Heavy Electricals

The company received LNTP worth over ₹90 crore from DVC for advance engineering and procurement of long lead items for the 1x800 MW Durgapur thermal power project main plant package.

Happiest Minds Technologies

The company launched Rel(AI)Build, an Agentic AI platform to transform enterprise software delivery.

PCBL Chemical

The company commissioned a 20 KTPA specialty production line at its Mundra plant, increasing total specialty capacity to 132 KTPA.

Pine Labs

The company launched P3P, an agentic payment protocol enabling AI agents to complete UPI payments without human authentication, with Gullak live on the platform.

Prestige Estates Projects

The company partnered with Bengaluru Airport City to develop an integrated destination comprising a convention and exhibition centre, St. Regis and Marriott Marquis hotels, office space, and F&B offerings.

Sagility India

The company acquired CareSeed, a US-based healthcare analytics firm specializing in HEDIS reporting, chart abstraction and regulatory analytics, expanding its healthcare quality and Medicare Star Ratings capabilities.

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