22 December 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,966.40	150.85	0.58%
BSE Sensex	84,929.36	447.55	0.53%
GIFT Nifty*	26,183.00	+152.5	+0.59%
Dow Jones	48,134.89	183.04	0.38%
S&P 500	6,834.50	59.74	0.88%
NASDAQ	23,307.62	301.26	1.31%
FTSE 100	9,897.42	59.65	0.61%
CAC 40	8,151.38	0.74	0.01%
DAX	24,288.40	88.90	0.37%
Shanghai*	3,914.71	24.26	0.62%
Nikkei 225*	50,503.92	996.71	2.01%
Hang Seng*	25,746.00	55.47	0.22%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	56.98	0.46	0.81%
Oil (Brent)	60.93	0.38	0.63%
Gold	4,413.15	25.85	0.59%
Silver	68.80	1.31	1.94%
Copper	11,845.00	123.50	1.05%
Cotton	0.64	0.00	0.20%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.03%
USD/INR	89.27	-0.99	-1.10%
GBP/INR	119.47	-1.01	-0.84%
EUR/INR	104.56	-1.24	-1.17%
DXY Index	98.6	0.14	0.00%

VIX	Value	Change (Pts)	Change (%)
India	9.52	-0.19	-1.96%
S&P 500	14.91	-1.96	-11.62%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.602	0.010
US 10-Year Yield	4.139	0.006

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 151 points higher at 25,966 on Friday.

Fortis Healthcare

The company agreed to acquire People Tree Hospital, Yeshwanthpur, Bengaluru for ₹430 crore and plans additional ₹410 crore investment to expand capacity to 300+ beds.

Great Eastern Shipping

The company contracted to buy a 2015-built secondhand VLGC of about 84,048 cbm, expected to join the fleet in Q4 FY26.

GMR Airports

The company acquired 49.90% stake in Delhi Duty Free Services from DIAL for ₹183.22 crore, increasing its holding to 66.93%.

Hindustan Construction Company

The company, through HCC-VCCL JV with 65% stake, secured a ₹901 crore Northeast Frontier Railway contract for Tunnel 28 on the Tupul–Imphal broad gauge line.

Indus Towers

The company incorporated a step-down wholly owned subsidiary, Indus Towers Management FZE, in the UAE through its wholly owned subsidiary Indus Towers FZE.

Knowledge Marine & Engineering Works

The company received a ₹58.39 crore work order from DCIL for rock dredging at JNPA, Mumbai, to be completed within 90 days.

Krishna Institute of Medical Sciences

The company entered a long-term lease for ~1.168 acres in Chennai to set up a ~300-bed super speciality hospital.

NBCC (India)

The company received a PMC work order from IIM Sambalpur for Phase-II infrastructure development of its permanent campus worth ₹179.37 crore.

Park Medi World

The company agreed to acquire 100% stake in KP Institute of Medical Sciences, Agra, Uttar Pradesh, a 360-bed hospital, for ₹245 crore in cash.

RITES

The company signed an MoU with the Government of Botswana to collaborate on railway and transport infrastructure modernisation projects across the country.

Tata Consultancy Services

The company launched TCS BaNCS AI Compass, an AI upgrade to its BaNCS platform for banking and securities clients, enhancing decision-support capabilities.

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