1 September 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,080.40	-95.25	-0.39%
BSE Sensex	76,957.27	-307.23	-0.40%
GIFT Nifty*	24,187.00	-39.00	-0.16%
Dow Jones	53,185.90	-374.09	-0.70%
S&P 500	7,686.14	-25.62	-0.33%
NASDAQ	26,370.90	-31.53	-0.12%
FTSE 100	10,824.30	31.72	0.29%
CAC 40	8,334.50	-66.68	-0.79%
DAX	26,258.11	-311.88	-1.17%
Shanghai*	3,980.90	-5.40	-0.14%
Nikkei 225*	66,164.60	-147.33	-0.22%
Hang Seng*	25,281.69	-285.30	-1.12%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	86.53	0.77	0.90%
Oil (Brent)	91.07	0.58	0.64%
Gold	4,495.70	14.20	0.32%
Silver	66.61	0.39	0.59%
Copper	14,534.90	46.05	0.32%
Cotton	0.91	0.00	-0.28%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	-0.01	-0.53%
USD/INR	95.45	-0.10	-0.10%
GBP/INR	129.31	-0.25	-0.20%
EUR/INR	110.67	-0.37	-0.33%
DXY Index	99.5	-0.18	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.19	0.51	4.78%
S&P 500	14.92	0.49	3.40%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.95	0.030
US 10-Year Yield	4.78	0.018

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 95 points lower at 24,080 on Monday.

Aster DM Quality Care

The company approved a ~184-bed capacity expansion at KIMSHEALTH Trivandrum, taking capacity to ~979 beds by May'28, with an investment of ~₹134 crore, funded 70% through debt.

Aurobindo Pharma

The company launched generic Advair Diskus in the US in 100/50 mcg and 250/50 mcg strengths, marking the first product from its inhalation pipeline to be commercialized in the US.

Brigade Enterprises

The company entered Coimbatore through a 5.4-acre residential JDA in Saravanampatti, with GDV of ~₹600 crore.

C.E. Info Systems

The company partnered with ClarityX to launch Geo-FI, a geospatial intelligence platform for BFSI lending covering expansion, underwriting, and collections.

Ceigall India

The company commissioned its first 5 MW solar project in Maharashtra through its wholly owned subsidiary, forming part of the 147 MW portfolio under MSKVY 2.0.

Cipla

The company secured exclusive rights to develop and commercialise SBP Group’s TQB2102 HER2 bispecific ADC across India, South Africa, and five emerging markets.

ITC

The company will merge ITC Infotech with Happiest Minds Technologies via a 25:81 share swap, following ITC Infotech’s acquisition of 22.1% Happiest Minds stake from promoters for ₹1,330 crore.

Marine Electricals

The company secured ₹398.8 crore of orders from Princeton Digital Group and Classic Electric for supply of power distribution systems, with execution over 18 months and 6-8 months, respectively.

NCC

The company secured three Buildings Division orders worth ₹430 crore in August 2026, excluding GST.

Tata Power

The company commissioned a 100 MW group captive solar project at Kayathar, Tamil Nadu, taking its operational utility renewable capacity beyond 7 GW and total utility portfolio to 12.3 GW.

Time Technoplast

The company secured an ₹87.5 crore order from a PSU JV of two Maharatna PSUs for Type IV composite CNG mobile storage cascades, with execution within one year.

Transformers & Rectifiers India

The company secured its first nuclear-sector order from MEIL for generator transformers for NPCIL’s Kaiga Units 5 & 6 project in Karnataka.

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