

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,405.60	-77.95	-0.33%
BSE Sensex	74,346.17	-303.67	-0.41%
GIFT Nifty*	23,308.00	-24.00	-0.10%
Dow Jones	50,687.10	-620.72	-1.21%
S&P 500	7,553.68	-56.10	-0.74%
NASDAQ	26,854.00	-239.93	-0.89%
FTSE 100	10,332.30	-41.21	-0.40%
CAC 40	8,150.42	-58.67	-0.71%
DAX	24,795.94	-328.23	-1.31%
Shanghai*	4,069.28	-14.70	-0.36%
Nikkei 225*	66,981.70	-1,420.42	-2.08%
Hang Seng*	25,309.00	-324.22	-1.26%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	94.81	-1.21	-1.26%
Oil (Brent)	96.53	-1.28	-1.31%
Gold	4,489.40	22.50	0.50%
Silver	73.36	-0.33	-0.45%
Copper	13,920.15	-45.75	-0.33%
Cotton	0.77	0.00	-0.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.08%
USD/INR	95.78	0.50	0.52%
GBP/INR	128.88	0.56	0.43%
EUR/INR	111.31	0.39	0.35%
DX Index	99.46	0.20	0.00%

VIX	Value	Change (Pts)	Change (%)
India	16.28	0.92	5.99%
S&P 500	16.06	0.29	1.84%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.03	0.010
US 10-Year Yield	4.48	-0.012

Market Updates

The markets are expected to open marginally lower today as trends in GIFT NIFTY indicate a negative start for the broader index after NIFTY closed 78 points lower at 23,405 on Wednesday.

Aurobindo Pharma

The company's subsidiary inaugurated TheraNym, a biologics contract manufacturing facility in Hyderabad, with MSD as the anchor customer.

Bajel Projects

The company received a mega EPC order for design, engineering, procurement, supply, erection, testing and commissioning of a 400/220/33 KV GIS substation for a Mumbai data centre client, to be executed over 24 months.

BHEL

The company secures Rs. 2,000–2,500 crore order from Nigeria's Dangote Petroleum Refinery for eight gas turbine generator packages.

Clean Max Enviro Energy Solutions

The company partnered with Gujarat Alkalies and Chemicals to supply hybrid renewable power from 75.90 MW wind and 84.34 MWp solar projects for its Dahej and Vadodara units under a group captive structure.

Gujarat Fluorochemicals

The company's subsidiary GFCL EV Products incorporated GFCL EV New Age Materials SAOC in Oman.

Hero MotoCorp

The company unveiled Flex Fuel variants of Splendor+ and HF Deluxe, compatible with E20-E85 ethanol blends, with launch starting in July 2026.

Indian Energy Exchange

The company reported May electricity traded volume of 12,983 MU up 18.6% YoY, with DAM volume up 25% to 4,417 MU and RTM volume up 16% to 5,529 MU.

Jain Irrigation Systems

The company commissioned a ~20,000 TPA biochar facility in Maharashtra with 50+ TPD processing capacity, among the world's largest single-unit biochar reactors.

Jubilant Agri and Consumer Products

The company commenced partial commercial production of Polymer (Adhesive) at its Vadodara facility, with the balance capacity to be commissioned in 6–8 months.

NBCC (India)

The company received ₹83.24 crore work orders from Canara Bank (₹39.99 crore), Andhra Pradesh Bhavan (₹5.51 crore) and Odisha F&ARD Department (₹37.74 crore) for residential, government and animal husbandry infrastructure projects.

Power Mech Projects

The company secured ₹266.26 crore order from Adani Infrastructure Management Services for operation and maintenance of 2x300 MW Butibori thermal power plant for 60 months.

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