8 August 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,596.2	22.0	0.09%
BSE Sensex	80,623.3	79.3	0.10%
GIFT Nifty*	24,644.0	-51.0	-0.21%
Dow Jones	43,968.64	-224.48	-0.51%
S&P 500	6,340.00	-5.06	-0.08%
NASDAQ	21,242.70	73.27	0.35%
FTSE 100	9,100.77	-63.54	-0.69%
CAC 40	7,709.32	74.29	0.97%
DAX	24,192.5	268.1	1.12%
Shanghai*	3,636.7	-3.0	-0.08%
Nikkei 225*	41,892.54	833.39	2.03%
Hang Seng*	24,934.0	-147.6	-0.59%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.7	-0.1	-0.13%
Oil (Brent)	66.5	0.1	0.08%
Gold	3,387.6	-9.7	-0.29%
Silver	38.1	-0.2	-0.55%
Copper	9,636.5	32.0	0.33%
Cotton	0.65	0.00	-0.11%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.12
USD/INR	87.71	-0.03	-0.04
GBP/INR	117.25	0.57	0.49
EUR/INR	102.38	0.73	0.71
DXY Index	98.11	-0.10	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.69	-0.27	-2.26%
S&P 500 VIXApr 24	16.57	-0.2	-1.19%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.401	-0.001
US 10-Year Yield	4.238	-0.001

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 21 points higher at 24,596 on Thursday.

Adani Enterprises
The company's subsidiary, Mundra Synenergy, has set up Nagpur Syn-Gas & Chemicals for chemical manufacturing.

Adani Power
The company received ₹25,000 crore LOI from Bihar State Power Generation for a 60-month 2,400 MW Pirpainti thermal project under DBFOO model.

Cyient
The company's subsidiary Cyient Semiconductors entered a strategic channel partnership with GlobalFoundries to resell its semiconductor manufacturing services and technologies, expanding access to advanced chipmaking capabilities.

HDB Financial Services
The company allotted 50,000 secured redeemable NCDs worth ₹500 crore via private placement for 881 days at 7.9611% annual coupon.

LTIMindtree
The company secured a ₹792 crore order from CBDT to design and operate PAN 2.0, a unified AI-driven digital identity platform.

Oil India
The company signed an MoU with IREL to jointly develop critical minerals and rare earths under India's National Critical Mineral Mission.

Tanla Platforms
The company signed a multi-year SaaS deal with Indosat Ooredoo Hutchison to deploy Wisely.ai for anti-spam/scam protection across SMS, voice, and VoIP.

Thomas Cook India
The company and SOTC expanded their spiritual tours with aerial darshans, VIP access, and curated circuits across India, Nepal, and Sri Lanka.

Time Technoplast
The company signed a 3-year MoU with Drone Stark Technologies to jointly develop hydrogen-powered drones using composite hydrogen cylinders and fuel cell technology, aiming to enhance UAV performance and sustainability.

Zydus Lifesciences
The company received Health Canada's NOC for ZDS-Varenicline tablets 0.5 & 1 mg, its first approval in Canada.

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