Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,446.80	117.80	0.50%
BSE Sensex	74,828.25	299.17	0.40%
GIFT Nifty*	23,271.00	-174.50	-0.74%
Dow Jones	51,511.60	-352.10	-0.68%
S&P 500	7,706.03	-58.61	-0.75%
NASDAQ	26,936.00	-308.24	-1.13%
FTSE 100	10,705.30	-3.07	-0.03%
CAC 40	8,123.41	-31.50	-0.39%
DAX	25,410.63	-168.22	-0.66%
Shanghai*	3,919.25	-17.26	-0.44%
Nikkei 225*	65,918.60	899.63	1.38%
Hang Seng*	24,725.00	-109.12	-0.44%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	91.55	-0.61	-0.66%
Oil (Brent)	102.27	-0.81	-0.79%
Gold	4,319.20	0.80	0.02%
Silver	64.48	-0.48	-0.75%
Copper	14,733.85	-62.30	-0.42%
Cotton	0.79	-0.01	-0.98%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.30%
USD/INR	95.73	0.13	0.13%
GBP/INR	127.33	-0.48	-0.38%
EUR/INR	109.31	-0.31	-0.29%
DXY Index	101.17	0.61	0.01%

VIX	Value	Change (Pts)	Change (%)
India	10.35	-0.65	-5.91%
S&P 500	15.18	0.97	6.83%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.05	0.030
US 10-Year Yield	5.12	0.007

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 118 points higher at 23,446 on Wednesday.

Awfis Space Solutions

The company launched its ninth Elite centre in Aerocity, New Delhi, adding ~1 lakh sq ft of workspace, taking its premium portfolio to 37 centres.

Bharat Dynamics

The company secured an ₹810.79 crore contract from the Ministry of Defence for SAT-SAAW supply to the IAF, with deliveries scheduled across FY28-FY29.

Exide Industries

The company completed commissioning of Phase-I of its subsidiary EESL's 6 GWh lithium-ion cell manufacturing facility in Devanahalli, Bengaluru.

Garware Hi-Tech Films

The company signed an MoU with Lubrizol for TPU film development and manufacturing, with ₹118 crore investment and operations targeted by Dec'26.

GHCL

The company was declared preferred bidder for a 6.88-hectare limestone block in Gujarat, with 5.67 lakh tonnes of reserves, subject to performance security submission within 45 days.

Max Estates

The company signed a binding MoU for a proposed 9.76-acre JDA in Ghaziabad, with ~1.5mn sq ft development potential and GDV of ~₹2,500-3,000 crore, subject to approvals and due diligence.

Oswal Pumps

The company received a ₹297.5 crore LoI from TREDCL for 46.7 MW rooftop solar installations across 9,937 government schools in Telangana, with completion within 180 days and 5-year maintenance.

PC Jeweller

The company repaid outstanding debt to another consortium bank, taking repayments to 13 of 14 banks and discharging >99% of outstanding bank debt.

Power Grid

The company acquired 100% of Barmer HVDC Power Transmission for ~₹19 crore under TBCB, comprising a 6 GW ±800 kV HVDC transmission system between Rajasthan and Maharashtra.

Raymond

The company's subsidiary JK Maini Global Aerospace emerged successful in a tender to assemble wing and centre fuselage structures for an indigenous fighter aircraft programme, leveraging customer infrastructure.

Royal Orchid Hotels

The company launched Regenta Hubballi in Karnataka through its subsidiary, adding 117 rooms and ~25,000 sq ft of banquet and event space.

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