

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,112.4	319.2	1.29%
BSE Sensex	82,408.2	1,046.3	1.29%
GIFT Nifty*	24,990.5	-138.5	-0.55%
Dow Jones	42,206.82	35.16	0.08%
S&P 500	5,967.84	-13.03	-0.22%
NASDAQ	19,447.41	-98.86	-0.51%
FTSE 100	8,774.65	-17.15	-0.2%
CAC 40	7,589.66	36.21	0.48%
DAX	23,350.6	293.2	1.27%
Shanghai*	3,359.0	-0.9	-0.03%
Nikkei 225*	38,222.87	-180.36	-0.47%
Hang Seng*	23,431.0	-99.5	-0.42%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	75.3	1.2	1.62%
Oil (Brent)	78.7	1.3	1.72%
Gold	3,362.8	-5.9	-0.18%
Silver	36.1	0.0	0.11%
Copper	9,945.0	233.0	2.40%
Cotton	0.64	0.00	0.16%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	0.07
USD/INR	86.59	-0.15	-0.17
GBP/INR	116.85	0.43	0.37
EUR/INR	99.81	0.26	0.26
DXY Index	98.61	-0.30	-0.30

VIX	Value	Change (Pts)	Change (%)
India VIX	13.67	-0.58	-4.07%
S&P 500 VIXApr 24	20.62	0.48	2.38%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.382	0.003
US 10-Year Yield	4.397	0.018

## 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 319 points higher at 25,112 on Friday.**

**ACME Solar**

The company signed a 25-year PPA with NHPC for a 250 MW FDRE project in Rajasthan with ₹4.56/kWh tariff and 40% CUF.

**AXISCADES Technologies**

The company signed an MoU with Indra to co-develop and manufacture aerospace and defense systems in India including DME and countermeasure tech.

**Bharat Electronics**

The company secured fresh orders worth ₹585 crore for fire control and sighting systems for missiles, communication equipment, jammers, spares, services, etc.

**Dilip Buildcon**

The company received LOA worth ₹1,341 crore from Konkan Railway for a tunnel and 4-lane road project in Kerala on EPC basis.

**Hindustan Aeronautics**

The company won ISRO's Small Satellite Launch Vehicle tech transfer including design, manufacturing, training, launch ops, and post-flight analysis to meet Indian and global demand.

**Lemon Tree Hotels**

The company signed an HOA via subsidiary Carnation Hotels to operate a 336-suite "Lemon Tree Suites" in Greater Noida, Uttar Pradesh.

**Lloyds Metals and Energy**

The company commissioned a 4 MTPA pellet plant at Konsari and an 85 KM slurry pipeline from Hedri, enhancing its integrated iron ore operations.

**NLC India**

The company's subsidiary, NLC India Renewables, receives a LoA from Tamil Nadu Green Energy Corporation for the development of three standalone BESS projects with a total capacity of 250 MW/500 MWh.

**Suzlon Energy**

The company received a 170.1 MW repeat order from AMPIN Energy for 54 S144 WTGs (3.15 MW each) to be executed in Kurnool, Andhra Pradesh in FY26.

**Tata Consultancy Services**

The company opened centres in Germany and Romania to develop SDV software for global automakers in infotainment, ADAS, and connectivity.

**Transformers and Rectifiers India**

The company secured an export order worth \$16.65 million from Jindal Energy Botswana for 12 transformers to be delivered in FY26.

**Zen Technologies**

The company announces Strategic Acquisition of Majority Stake in TISA Aerospace.

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