

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,196.75	-34.55	-0.14%
BSE Sensex	77,988.68	-122.56	-0.16%
GIFT Nifty*	24,174.50	+3.5	+0.01%
Dow Jones	48,578.70	115.00	0.24%
S&P 500	7,041.28	18.33	0.26%
NASDAQ Comp.	24,102.70	86.69	0.36%
FTSE 100	10,590.00	30.41	0.29%
CAC 40	8,262.70	-11.87	-0.14%
DAX	24,154.47	87.77	0.36%
Shanghai*	4,050.39	-5.16	-0.13%
Nikkei 225*	58,930.90	-587.47	-0.99%
Hang Seng*	26,099.67	-294.60	-1.12%

\*As at 8.30 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	93.32	-1.37	-1.45%
Oil (Brent)	98.23	-1.16	-1.17%
Gold	4,809.60	1.30	0.03%
Silver	78.61	-0.10	-0.13%
Copper	13,178.85	24.85	0.19%
Cotton	0.75	0.00	-0.37%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	-0.19%
USD/INR	93.20	-0.19	-0.20%
GBP/INR	126.18	-0.42	-0.33%
EUR/INR	109.79	-0.24	-0.22%
DXY Index	98.26	0.23	0.00%

VIX	Value	Change (Pts)	Change (%)
India VIX	18.09	-0.58	-3.11%
S&P 500 VIX	17.94	-0.23	-1.27%

Indicators	Value (%)	Change (bps)
India 10-Year Yield	6.89	0.030
US 10-Year Yield	4.32	0.006

## 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 34 points lower at 24,196 on Thursday.

### Bharat Petroleum Corporation

The company's subsidiary holds 26.16% effective stake in Brazil BM-SEAL-11 where consortium approved FID for SEAP I project with planned FPSO capacity 120 thousand bopd and 10 million m<sup>3</sup> gas processing.

### CESC

The company signed PPAs for 600 MW wind solar hybrid projects with Purvah Green Power 300 MW, Vismaya Renewables 100 MW, Hexa Climate 100 MW, and Sprng Energy 100 MW.

### Enviro Infra Engineers

The company secured ₹2,240 crore orders since March taking order book above ₹4,600 crore including ₹2,500 crore water, ₹1,000 crore renewable, ₹1,100 crore O&M.

### Marine Electricals

The company received ₹16.90 crore orders excluding taxes from Afcons Infrastructure, Knowledge Shipyard, and Udupi Cochin Shipyard for power systems, switchboards, and diesel generator.

### MosChip Technologies

The company proposed acquiring 73% stake in Vayavya Labs for ₹245.49 crore via 60.50% cash and 39.50% share swap, with balance 27% post FY28.

### Pace Digitek

The company reported FY26 order inflow ₹6,459.7 crore with ₹5,814.7 crore from energy and ₹645 crore from telecom across BOO, EPC, and supply contracts.

### Rail Vikas Nigam

The company emerged L1 bidder for ₹967.93 crore East Coast Railway EPC project for bridge construction on Bhadrak Vizianagaram section.

### Shyam Metalics and Energy

The company commenced Phase II colour coated sheets production, adding 0.15 MTPA capacity, taking total installed capacity to 0.40 MTPA at Jamuria plant.

## Equity Research Desk

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