Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,585.30	261.75	1.03%
BSE Sensex	83,467.66	862.23	1.04%
GIFT Nifty*	25,607.00	-36.00	-0.14%
Dow Jones	45,952.24	-301.07	-0.65%
S&P 500	6,629.07	-41.99	-0.63%
NASDAQ	22,562.54	-107.54	-0.47%
FTSE 100	9,436.09	11.34	0.12%
CAC 40	8,188.59	111.59	1.38%
DAX	24,272.19	90.82	0.38%
Shanghai*	3,889.74	-26.48	-0.68%
Nikkei 225*	47,886.39	-391.35	-0.81%
Hang Seng*	25,541.00	-347.51	-1.34%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	58.65	-0.10	-0.17%
Oil (Brent)	62.14	-0.33	-0.53%
Gold	4,226.11	17.52	0.42%
Silver	53.99	-0.29	-0.53%
Copper	10,495.00	-207.00	-1.93%
Cotton	0.64	0.00	-0.49%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.09%
USD/INR	87.88	-0.20	-0.23%
GBP/INR	118.06	0.51	0.43%
EUR/INR	102.46	0.01	0.01%
DXY Index	98.23	-0.44	0.00%

VIX	Value	Change (Pts)	Change (%)
India	10.87	0.34	3.23%
S&P 500	25.31	4.67	22.63%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.495	0.007
US 10-Year Yield	4.020	0.003

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 261 points higher at 25,585 on Thursday.

Apollo Micro Systems
The company emerged as lowest bidder for orders worth ₹392.7 million from DRDO and DPSUs and received ToT from DRDO for Mechatronic Fuze.

Ashok Leyland
The company won an order for 1,937 buses from TNSTU, supplying fully built and chassis variants with advanced iGen6 BS VI technology.

Bharat Forge
The company partnered with Rolls-Royce to manufacture fan blades for Pearl 700 and 10X engines, strengthening its global aerospace supply position.

Biocon
The company expanded its partnership with Civica to supply and distribute Insulin Glargine in the US under an exclusive private label agreement.

BLS International
The company won a 3-year MEA contract to establish and operate Indian Visa Application Centres in Beijing, Shanghai, and Guangzhou, China.

EMS
The company received a Letter of Acceptance from UP Jal Nigam for Fatehpur sewerage project worth ₹183.81 crore to be executed in 24 months.

NTPC
The company’s subsidiary NTPC Green Energy declared COD of 12.5 MW solar capacity in Bhuj, raising NGEL Group’s total installed capacity to 7419.975 MW.

Paras Defence and Space Technologies
The company incorporated Paras Heven Advanced Drones as a subsidiary to develop and produce logistics and cargo drones for defence and civil markets.

PNC Infratech
The company received a ₹297.01 crore LoA from AAI for developing Varanasi airport, including runway extension, re-carpeting, and strengthening works.

Power Mech Projects
The company secured over ₹2500 crore EPC order from BHEL for Balance of Plant at 1 x 800 MW Singareni TPS, Telangana.

Route Mobile
The company partnered with Kalaam Telecom to provide WhatsApp Business solutions across the Middle East, enhancing enterprise customer engagement and digital communication capabilities.

TCPL Packaging
The company invested ₹69 lakh in rights issue of wholly owned subsidiary Creative Offset Printers, engaged in mobile phone packaging, maintaining 100% shareholding.

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