

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,828.6	429.4	1.92%
BSE Sensex	75,157.3	1,310.1	1.77%
GIFT Nifty*	23,294.5	+272.0	+1.18%
Dow Jones	40,524.79	312.08	0.78%
S&P 500	5,405.97	42.61	0.79%
NASDAQ Comp.	16,831.48	107.03	0.64%
FTSE 100	8,134.34	170.16	2.14%
CAC 40	7,273.12	168.32	2.37%
DAX	20,954.8	+580.73	+2.85%
Shanghai*	3,262.8	+24.58	+0.76%
Nikkei 225*	33,982.36	396.78	1.18%
Hang Seng*	21,417.40	502.71	2.4%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.6	0.1	0.21%
Oil (Brent)	65.0	0.4	0.63%
Gold	3,212.5	-24.8	-0.77%
Silver	32.3	0.0	0.00%
Copper	9,813.5	-71.9	-0.73%
Cotton	0.64	-0.02	-2.37%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.13	0.01	1.29
USD/INR	86.05	-0.65	-0.75
GBP/INR	112.72	0.96	0.86
EUR/INR	97.97	2.22	2.32
DX Index	99.69	-1.17	-1.16

VIX	Value	Change (Pts)	Change (%)
India VIX	20.11	-1.32	-6.16%
S&P 500 VIXApr 24	30.44	-7.12	-18.96%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.444	0.001
US 10-Year Yield	4.384	0.008

## 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 429 points higher at 22,828 on Friday.

**Ahluwalia Contracts (India) Ltd**

The company received a ₹396.5 crore domestic housing project order from Godrej Properties for construction at Godrej Riverine, Noida, to be executed in 25 months.

**Aurobindo Pharma Ltd**

The company received 11 procedural observations from USFDA for its Raleigh plant.

**CEAT Ltd**

The company approved a ₹3.45 crore rights issue investment in its wholly owned subsidiary Tyresnmore, maintaining 100% shareholding in the auto ancillary firm.

**Ceinsys Tech Ltd**

The company received NCLT approval for the amalgamation of its wholly owned subsidiary Allygrow Technologies Pvt. Ltd. into Ceinsys Tech Ltd.

**Godrej Industries Ltd**

The company acquired Savannah Surfactants' Food Additives business to expand its global specialty chemicals offerings in the Food & Beverages sector.

**HCL Technologies Ltd**

The company integrated NVIDIA AI Enterprise and Omniverse into its GenAI and SmartTwin platforms to accelerate AI adoption and product simulations.

**Havells India Ltd**

The company announced acquisition of solar module manufacturer Goldi Solar Pvt. Ltd., with FY24 revenue of ₹1,757 crore and estimated FY25 revenue of ₹3,420 crore.

**Indian Hotels Co Ltd**

The company expanded its portfolio to 380 hotels by achieving 100 new locations in FY25 through 74 signings and 26 openings.

**Macrotech Developers Ltd**

The company resolved all disputes between the Lodha brothers, affirming exclusive rights to the 'Lodha Group' and 'HoABL' brands respectively.

**Tata Power Company Ltd**

The company's subsidiary signed a ₹4,500 crore PPA with NTPC for a 200 MW renewable project with 24-month execution timeline.

**Transrail Lighting Ltd**

The company secured ₹1,085 crore in fresh domestic T&D orders, reinforcing its market position as FY26 begins.

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