

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,639.15	-227.70	-0.95%
BSE Sensex	76,034.42	-829.29	-1.08%
GIFT Nifty*	23,500.00	-217.00	-0.91%
Dow Jones	46,677.85	-739.42	-1.56%
S&P 500	6,672.62	-103.18	-1.52%
NASDAQ Comp.	22,311.98	-404.15	-1.78%
FTSE 100	10,305.15	-48.62	-0.47%
CAC 40	7,984.44	-57.37	-0.71%
DAX	23,589.65	-50.38	-0.21%
Shanghai*	4,124.79	-4.31	-0.10%
Nikkei 225*	53,786.40	-666.56	-1.22%
Hang Seng*	25,653.00	-63.77	-0.25%

*As at 8.30 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	96.16	0.43	0.45%
Oil (Brent)	101.04	-0.61	-0.60%
Gold	5,113.86	22.23	0.44%
Silver	84.47	0.36	0.43%
Copper	12,896.40	46.15	0.36%
Cotton	0.65	0.01	1.54%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.14%
USD/INR	92.16	0.12	0.13%
GBP/INR	123.28	-0.20	-0.17%
EUR/INR	106.38	-0.32	-0.30%
DX Index	99.74	0.35	0.00%

VIX	Value	Change (Pts)	Change (%)
India VIX	21.52	0.45	2.14%
S&P 500 VIX	27.29	3.06	12.63%

Indicators	Value (%)	Change (bps)
India 10-Year Yield	6.67	0.030
US 10-Year Yield	4.22	0.063

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 227 points lower at 23,639 on Thursday.

Aarti Industries

The company signed a multi year supply agreement with a global agrochemical company to supply a crop protection intermediate with contract revenue of about \$150 million through March 2030.

ACME Solar Holdings

The company through subsidiary ACME Greentech Seventh signed 25 year PPAs with SJVN for 450 MW or 1,800 MWh ISTS connected assured peak power project.

Ceigall India

The company with 74% JV stake emerged L1 bidder for three MoRTH EPC road projects in Arunachal Pradesh worth ₹611.10 crore, ₹525.00 crore and ₹492.52 crore.

Diamond Power Infrastructure

The company received a ₹31.51 crore LOI from Tata Power Renewable Energy for supply of 869 km AL-59 ECO conductors to be executed within four months.

Enviro Infra Engineers

The company received a ₹411.08 crore order from Bihar Urban Infrastructure Development Corporation for EPC of a 20 MLD STP and Aurangabad sewerage network with five year O&M.

KNR Constructions

The company received a ₹50.47 crore LOA from Greater Hyderabad Municipal Corporation for construction of a four lane unidirectional flyover at Rasoolpura in Telangana on EPC basis with 24 month execution.

Optimus Infracom

The company's subsidiary Optimus Electronics signed a manufacturing agreement with Ai+ Smartphone to produce 3 million devices in India with ₹125 crore investment over five years.

Raymond Realty

The company launched Ten X District 9, a 9 acre residential project in Thane with estimated revenue potential of ₹2,000 crore.

VA Tech Wabag

The company received a PPP order from CMWSSB for refurbishment and O&M of a 45 MLD TTRO plant at Kodungaiyur Chennai with 18 month refurbishment and 18.5 year O&M period.

Vikram Solar

The company through PowerHive launched the VION lithium ion battery range for inverter, integrated home backup and e rickshaw applications and secured a 100 MWh BESS order.

Equity Research Desk

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