

Equity Research Desk

| Indices | Value | Change (Pts) | Change (%) |
|-------------|-----------|--------------|------------|
| Nifty 50 | 23,649.95 | 6.45 | 0.03% |
| BSE Sensex | 75,315.04 | 77.05 | 0.10% |
| GIFT Nifty* | 23,649.50 | +32.0 | +0.14% |
| Dow Jones | 49,686.10 | 159.95 | 0.32% |
| S&P 500 | 7,403.05 | -5.45 | -0.07% |
| NASDAQ | 26,090.70 | -134.41 | -0.51% |
| FTSE 100 | 10,323.80 | 128.38 | 1.26% |
| CAC 40 | 7,987.49 | 34.94 | 0.44% |
| DAX | 24,307.92 | 357.35 | 1.49% |
| Shanghai* | 4,110.36 | -21.16 | -0.51% |
| Nikkei 225* | 60,443.60 | -372.38 | -0.61% |
| Hang Seng* | 25,808.00 | 132.81 | 0.52% |

*As at 8.00 am

| Commodity | Price (USD) | Change (Pts) | Change (%) |
|-------------|-------------|--------------|------------|
| Oil (WTI) | 107.40 | -1.26 | -1.16% |
| Oil (Brent) | 109.68 | -2.42 | -2.16% |
| Gold | 4,559.20 | 1.20 | 0.03% |
| Silver | 77.00 | -0.44 | -0.57% |
| Copper | 13,427.85 | -125.55 | -0.93% |
| Cotton | 0.83 | 0.00 | -0.53% |

| Currency | Value | Change (Pts) | Change (%) |
|----------|--------|--------------|------------|
| EUR/USD | 1.16 | 0.00 | 0.13% |
| USD/INR | 96.31 | 0.33 | 0.35% |
| GBP/INR | 128.77 | 0.68 | 0.53% |
| EUR/INR | 112.06 | 0.47 | 0.42% |
| DX Index | 99.08 | -0.19 | 0.00% |

| VIX | Value | Change (Pts) | Change (%) |
|---------|-------|--------------|------------|
| India | 19.63 | 0.84 | 4.47% |
| S&P 500 | 17.82 | -0.61 | -3.31% |

| Indicators | Value (%) | Change (Bps) |
|---------------------|-----------|--------------|
| India 10-Year Yield | 7.12 | 0.050 |
| US 10-Year Yield | 4.60 | -0.024 |

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 6 points higher at 23,649 on Monday.

Bondada Engineering

The company secured ₹469.52 Cr orders from Adani Group for 250 MW BOS package at Khavda, Gujarat, raising executed capacity to 975 MW.

G R Infraprojects

The company subsidiary executed NHA concession agreement for INR 1453.57 Cr NH-56 Gujarat HAM project.

GE Vernova T&D India

The company approved INR 550M investment for new Tamil Nadu facility producing Disconnectors and 362 kV Drives, first output December 2026.

Lemon Tree Hotels

The company signed a 50-room Keys Prima hotel in Karnal, Haryana under franchise model.

Marine Electricals (India)

The company received Rs 208.72 Cr orders from Adani Infra and Udupi Cochin Shipyard for power distribution and alarm monitoring systems.

Max Healthcare Institute

The company acquired ~58.28% stake in Kalinga Hospital Ltd, which operates a 250-bed multi-specialty hospital in Bhubaneswar, for ~₹297.97 crore, making KHL a subsidiary.

NTPC

The company subsidiary Patratu Vidyut Utpadan Nigam completed trial operation of 800 MW Unit-2, raising NTPC group installed capacity to 90,668 MW.

Pace Digitek

The company secured ₹7,099M BESS EPC and 12-year O&M contract from NLC India Renewables for 250MW/500MWh Tamil Nadu project.

Waaree Renewable Technologies

The company signed turnkey EPC contract for 350MW/1400MWh BESS with two-year O&M services from Waaree Forever Energies Private Limited.

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