23 March 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,114.50	112.35	0.49%
BSE Sensex	74,532.96	325.72	0.44%
GIFT Nifty*	22,845.50	-291.00	-1.26%
Dow Jones	45,577.50	-443.96	-0.96%
S&P 500	6,506.48	-100.01	-1.51%
NASDAQ	21,647.60	-443.08	-2.01%
FTSE 100	9,918.33	-145.17	-1.44%
CAC 40	7,665.62	-142.25	-1.82%
DAX	22,380.19	-459.37	-2.01%
Shanghai*	3,899.04	-58.01	-1.47%
Nikkei 225*	53,372.50	-1,866.87	-3.38%
Hang Seng*	24,589.00	-688.33	-2.72%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	98.09	2.54	2.66%
Oil (Brent)	112.19	0.90	0.83%
Gold	4,492.00	-113.70	-2.47%
Silver	67.81	-3.41	-4.78%
Copper	11,825.35	-677.50	-5.42%
Cotton	0.68	0.00	0.37%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.27%
USD/INR	93.71	1.07	1.16%
GBP/INR	125.41	2.34	1.90%
EUR/INR	108.23	1.32	1.24%
DXY Index	99.61	0.34	0.00%

VIX	Value	Change (Pts)	Change (%)
India	22.81	0.01	0.04%
S&P 500	24.75	1.22	5.18%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.74	0.010
US 10-Year Yield	4.39	0.103

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 112 points higher at 23,114 on Friday.

Ashok Leyland
The company approved investment up to ₹375 crore in subsidiary Optare Plc through equity infusion increasing stake from 93% to 93.28%.

Ceigall India
The company's subsidiary emerged as L1 bidder from NHAI for ₹603 crore HAM project for 6 lane spur connectivity of 10.3 km in Punjab.

Max Estates
The company launched Estate 105 residential project in Noida with phase one GDV of ₹3,000 crore across ~10.33 acre development.

NDR InvIT Trust
The company signed an agreement to acquire 100% stake and control in NDR Unique Space for ₹285 crore involving 52.71 acres warehousing land in Hosur.

Park Medi World
The company completed acquisition of 100% stake in SVPD Healthcare making it a wholly owned subsidiary completing acquisition of 360 bed KP Institute of Medical Sciences Agra.

Patel Engineering
The company received ₹230.70 crore LOA from Dorjilung Hydro Power for preconstruction works of 1,125 MW hydropower project in Bhutan.

RailTel Corporation
The company received ₹24.54 crore LoA from East Coast Railway for manpower outsourcing and secured ₹159.81 crore order from Prasar Bharati for cloud based integrated newsroom services.

RITES
The company received ₹105.69 crore LOA from RDSO for 60 month maintenance of dedicated test track between Gudha and Thathana Mithri stations in Jodhpur division of NWR.

Tata Steel
The company commissioned scrap-based electric arc furnace at Ludhiana with 0.75 MnTPA capacity with investment of ₹3,200 crore supporting low emission steel production.

VA Tech Wabag
The company secured a large consortium EPC order from United Water Supply Company of Georgia for 19 MLD wastewater treatment plant at Kutaisi Georgia valued ₹250 - ₹600 crore.

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