Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,773.2	32.2	0.13%
BSE Sensex	80,787.3	76.5	0.09%
GIFT Nifty*	24,959.0	+58.5	+0.23%
Dow Jones	45,514.95	114.09	0.25%
S&P 500	6,495.15	13.65	0.21%
NASDAQ	21,798.70	98.31	0.45%
FTSE 100	9,221.44	13.23	0.14%
CAC 40	7,734.84	60.06	0.78%
DAX	23,807.1	210.2	0.89%
Shanghai*	3,830.3	+3.49	+0.09%
Nikkei 225*	43,738.95	95.14	0.22%
Hang Seng*	26,003.5	+369.59	+1.44%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.6	0.1	0.18%
Oil (Brent)	66.3	0.1	0.15%
Gold	3,652.7	16.8	0.46%
Silver	41.4	0.0	0.05%
Copper	9,810.5	-70.5	-0.71%
Cotton	0.65	0.00	0.11%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.01	0.83
USD/INR	88.26	0.10	0.11
GBP/INR	119.24	0.26	0.22
EUR/INR	103.16	0.00	0.00
DXY Index	97.35	-0.39	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.84	0.06	0.56%
S&P 500 VIXApr 24	15.11	-0.07	-0.46%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.461	0.000
US 10-Year Yield	4.161	-0.073

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 32 points higher at 24,773 on Monday.

ACME Solar
The company placed a 2 GWh battery energy storage system order via Posco International to support FDRE and standalone BESS projects in India.

Alpex Solar
The company received a ₹345 crore order from a leading manufacturer for supplying solar modules, reinforcing its presence in renewable energy solutions.

Avantel
The company received an amended purchase order worth ₹9.88 crore from the Department of Atomic Energy for supply to be completed by 2026.

Brigade Enterprises
The company signed a joint development agreement for a 10.75-acre residential project in East Bengaluru with ₹2,500 crore GDV and 2.5 million sq. ft. saleable area.

Ceigall India
The company secured 337 MW LoIs from MSEDCL to set up grid-connected solar projects in Maharashtra under Mukhyamantri Saur Krushi Vahini Yojana 2.0.

Diamond Power Infrastructure
The company received a ₹184.66 crore LOI from Adani Energy Solutions for supplying 4,215 KM AL-59 Zebra conductor for Khavda IV-D project.

Godrej Consumer Products
The company's subsidiary PT Godrej Consumer Products Indonesia started construction of a new Kendal plant adding 15% capacity with ₹250 crore investment.

Quality Power Electrical Equipments
The company's subsidiary Endoks Enerji received two European orders worth ₹75.19 crore for supplying FACTS systems to a steel plant.

SPML Infra
The company secured a ₹1,438 crore Jal Jeevan Mission order in a JV with JWIL Infra to develop water infrastructure and manage 10-year O&M in Rajasthan.

SpiceJet
The company completed a full payment of $24 million to Credit Suisse, settling a long-standing liability and strengthening its financial position.

TVS Motor
The company informs that it will fully pass GST rate reduction benefits on ICE vehicles to customers, enhancing affordability and driving wider adoption across segments.

Tata Communications
The company partnered with Cisco to launch a global eSIM and IoT connectivity solution enabling seamless device management across 200+ countries and 350 million eSIMs.

Vikram Solar
The company secured a 336 MW high-efficiency solar module supply order from L&T Construction for the Khavda solar project in Gujarat.

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