6 March 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,765.90	285.40	1.17%
BSE Sensex	80,015.90	899.71	1.14%
GIFT Nifty*	24,652.00	-144.50	-0.58%
Dow Jones	47,954.74	-784.67	-1.61%
S&P 500	6,830.71	-38.79	-0.56%
NASDAQ	22,748.99	-58.5	-0.26%
FTSE 100	10,413.94	-153.71	-1.45%
CAC 40	8,045.80	-121.93	-1.49%
DAX	23,815.75	-389.61	-1.61%
Shanghai*	4,112.23	3.66	0.09%
Nikkei 225*	55,253.62	-24.44	-0.04%
Hang Seng*	25,573.34	251.99	1.00%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	79.35	-1.66	-2.05%
Oil (Brent)	84.23	-0.08	-0.09%
Gold	5,119.59	35.28	0.69%
Silver	83.71	1.16	1.41%
Copper	12,840.75	-118.40	-0.91%
Cotton	0.63	0.01	1.40%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	-0.01	-0.52%
USD/INR	91.60	-0.56	-0.61%
GBP/INR	122.33	-0.79	-0.64%
EUR/INR	106.47	-0.50	-0.47%
DXY Index	98.97	0.20	0.00%

VIX	Value	Change (Pts)	Change (%)
India	17.86	-3.28	-15.52%
S&P 500	23.75	2.6	12.29%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.64	-0.03
US 10-Year Yield	4.12	0.03

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 285 points higher at 24,765 on Thursday.

Aarti Industries

The company amended its long term supply agreement with a global chemical company and will invest ₹200–250 crore over two years for backward integration at its Dahej SEZ facility.

Bharat Forge

The company’s subsidiary Kalyani Strategic Systems signed an MoU with GRSE to collaborate on indigenous ship propulsion systems for naval and commercial ships, enhancing India’s maritime self-reliance.

DCX Systems

The company received a ₹68.05 crore purchase order from Hindustan Aeronautics for manufacture and supply of custom made antennas and power supplies for airborne applications.

DEE Development Engineers

The company’s subsidiary DEE Piping Systems Thailand received LOI worth ₹20 crore from an international customer for HRSG piping supply for a Taiwan project.

Hindustan Zinc

The company signed an MoU with Virginia Tech to conduct research aimed at improving silver recovery across its lead zinc concentrators through optimized flotation processes and reagent usage.

Indian Energy Exchange

The company reported February electricity traded volume of 12,550 MU +30.4% YoY with DAM 6,588 MU, RTM 4,379 MU +51.7% YoY; average DAM price ₹3.58 per unit and RTM price ₹3.59 per unit.

Lemon Tree Hotels

The company signed a license agreement for a 49-room Lemon Tree Hotel in Barog, Himachal Pradesh, to be managed by Carnation Hotels Pvt Ltd, marking its 10th property in the state.

Mastek

The company’s subsidiary Mastek UK secured an engineering contract with the UK Home Office with overall budget of about £85 million to support and enhance the ATLAS platform.

MOIL

The company revised manganese ore prices for March 2026 increasing most grades by 2%, BGL509 and UKF532 by 10%, and reducing EMD price by ₹10,000 per MT to ₹1,80,000.

SAMHI Hotels

The company will acquire 70% partnership interest in RARE India for ₹47.39 crore through capital contribution and partner stake purchase in two tranches.

Tata Elxsi

The company launched DevStudio.ai, an ASPICE-aligned multi-agent GenAI platform to accelerate automotive software engineering across OEMs and Tier-1 suppliers in body, chassis, infotainment, and SDV domains.

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