

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,123.00	-243.70	-1.04%
BSE Sensex	73,524.26	-719.09	-0.97%
GIFT Nifty*	23,133.00	-40.50	-0.17%
Dow Jones	50,786.00	-80.77	-0.16%
S&P 500	7,405.73	21.99	0.30%
NASDAQ	25,929.70	220.23	0.86%
FTSE 100	10,373.20	5.15	0.05%
CAC 40	8,199.29	-18.95	-0.23%
DAX	24,616.22	-142.83	-0.58%
Shanghai*	3,973.37	14.03	0.35%
Nikkei 225*	64,654.20	629.62	0.98%
Hang Seng*	24,524.22	-132.85	-0.54%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	90.68	-0.62	-0.68%
Oil (Brent)	93.66	-0.59	-0.63%
Gold	4,358.60	-4.80	-0.11%
Silver	67.87	-0.72	-1.04%
Copper	13,660.65	-70.25	-0.51%
Cotton	0.73	0.00	-0.59%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.17%
USD/INR	95.68	0.72	0.76%
GBP/INR	127.42	-0.42	-0.33%
EUR/INR	110.09	-0.41	-0.37%
DXI Index	99.96	-0.11	0.00%

VIX	Value	Change (Pts)	Change (%)
India	17.03	1.24	7.85%
S&P 500	18.92	-2.59	-12.04%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.95	-0.030
US 10-Year Yield	4.57	0.016

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 244 points lower at 23,123 on Monday.

Adani Ports

The company's step-down subsidiary secured 10-year marine services contract for Argentina's first LNG export project through a 51:49 joint venture with Meridian Group, backed by ~\$70 million investment.

Grasim Industries

The company approved ₹3,094 crore capex to expand Lyocell capacity by 110,000 TPA at Harihar, comprising two 55,000 TPA lines scheduled for commissioning in mid-2028 and mid-2030.

JNK India

The company secured a ₹300 crore - ₹600 crore export order from CC7 Emirates Engineering Solutions, UAE, for incinerator package and waste gas handling systems for ADNOC's TA'ZIZ Salt Project.

JSW Energy

The company commissioned its Halol wind blade manufacturing plant in Gujarat with annual capacity of 450 blades equivalent to 600 MW of wind projects.

Lemon Tree Hotels

The company signed franchise agreement for 88-room Keys Prima Jaipur, taking its Rajasthan portfolio to 23 hotels, including 13 operational and 10 upcoming properties.

Rail Vikas Nigam

The company received ₹221.33 crore LOA from South East Central Railway for electronic interlocking, signalling infrastructure, and related works in Bilaspur Division, to be executed over 2 years.

RailTel Corporation

The company received ₹82.04 crore LoA from Haryana Rail Infrastructure Development Corporation for railway signalling and associated works on the Dhulawat-Manesar-New Patli section.

Royal Orchid Hotels

The company, through its subsidiary Regenta Hotels, launched Z by Regenta City Centre Ahmedabad with 43 rooms.

SML Mahindra

The company reported May production of 1,729 units, up 6.9% YoY, sales of 1,678 units, up 11.6% YoY, and exports of 89 units, up 122.5% YoY.

Tata Consultancy Services

The company signed a multi-year, multi-million-euro AI-powered transformation and managed services agreement with Canada Life to modernise IT infrastructure across its European businesses.

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