

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,620.2	77.7	0.32%
BSE Sensex	80,998.3	260.7	0.32%
GIFT Nifty*	24,734.0	+18.0	+0.07%
Dow Jones	42,427.74	-91.9	-0.22%
S&P 500	5,970.81	0.44	0.01%
NASDAQ Comp.	19,460.49	61.53	0.32%
FTSE 100	8,801.29	14.27	0.16%
CAC 40	7,804.67	40.83	0.53%
DAX	24,276.5	184.86	0.77%
Shanghai*	3374.8	-1.4	-0.04%
Nikkei 225*	37,642.11	-105.34	-0.28%
Hang Seng*	23,654.03	141.54	0.6%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.7	0.0	-0.02%
Oil (Brent)	64.9	0.0	-0.05%
Gold	3,369.0	-7.6	-0.22%
Silver	34.5	-0.5	-1.40%
Copper	9,673.5	30.5	0.32%
Cotton	0.65	0.00	-0.18%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.01	0.45
USD/INR	85.90	0.31	0.36
GBP/INR	116.28	0.59	0.51
EUR/INR	97.79	0.12	0.12
DX Index	99.17	-0.06	-0.06

VIX	Value	Change (Pts)	Change (%)
India VIX	15.75	-0.81	-4.89%
S&P 500 VIXApr 24	17.61	-0.08	-0.45%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.261	-0.011
US 10-Year Yield	4.464	0.050

## 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 174 points lower at 24,542 on Tuesday.

## Ashok Leyland

The company won a ₹183.80 crore order from Tamil Nadu State Transport Corporation for 543 BSVI diesel chassis and fully built buses.

## CESC

The company awarded a ₹346.33 crore contract to Waaree Renewable Technologies for a 300 MW AC/435 MW DC solar project in Bikaner, to be completed in FY26.

## MOIL

The company recorded highest-ever May manganese ore production at 1.71 lakh tonnes, up +18% over CPLY, with exploratory core drilling rising +17.5% over CPLY to 13,352 meters.

## NLC India

The company incorporated a joint venture named NLC Rajasthan Power Limited with RVUNL, with NLCIL holding 74% and RVUNL 26% equity, to develop, operate, and maintain lignite mines and a lignite-based thermal power station.

## RITES

The company is L-1 bidder for a Rs. 28.50 crore TPI agency appointment contract by Gujarat Urban Development Company for WSS/UGD/STP projects under Amrut 2.0/SJMMSVY, execution period 60 months.

## Sansera Engineering

The company signed a ₹160 crore contract with Airbus to manufacture, supply, and support Airborne Intensive Care Transport Modules.

## Tata Communications

The company integrated a new submarine cable system TGN-IA2, built by ADC consortium, into its network to enhance intra-Asia connectivity.

## Techno Electric &amp; Engineering Company

The company was selected by RailTel as Managed Service Data Centre Partner to set up a 10MW Data Centre in Noida on a 30-year revenue-sharing basis.

## Texmaco Rail &amp; Engineering

The company received a ₹122.31 crore order from Mumbai Railway Vikas Corporation for traction works to be executed in 30 months.

## Wipro

The company won a multiyear deal with Entrust to provide AI-powered product development, infrastructure, application modernization, and security solutions.

## Zydus Lifesciences

The company's US unit ZPUI signed a deal to acquire two biologics manufacturing facilities from Agenus in California for up to \$125 million.

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