26 November 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,819.25	469.60	1.85%
BSE Sensex	83,938.28	1,502.29	1.82%
GIFT Nifty*	26,056.00	131.00	0.51%
Dow Jones	50,182.95	164.25	0.33%
S&P 500	7,182.78	-18.31	-0.25%
NASDAQ	23,585.80	-147.73	-0.62%
FTSE 100	10,426.94	-40.13	-0.38%
CAC 40	7,980.57	-59.92	-0.75%
DAX	24,702.13	-315.68	-1.26%
Shanghai*	3,475.65	-0.82	-0.02%
Nikkei 225*	57,915.59	903.97	1.59%
Hang Seng*	22,447.00	480.99	2.19%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	84.08	0.40	0.48%
Oil (Brent)	94.68	0.07	0.07%
Gold	3,588.75	-0.62	-0.02%
Silver	41.83	0.43	1.04%
Copper	11,701.85	-332.80	-2.77%
Cotton	0.80	0.01	0.67%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.0969	0.0003	0.03%
USD/INR	92.23	-0.69	-0.74%
GBP/INR	120.42	-0.98	-0.81%
EUR/INR	100.88	-1.09	-1.07%
DXY Index	103.74	-0.09	-0.09%

VIX	Value	Change (Pts)	Change (%)
India	17.70	0.00	0.00%
S&P 500	28.29	1.93	7.32%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.17	0.000
US 10-Year Yield	4.86	-0.038

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 470 points higher at 25,819 on Wednesday.

Apeejay Surrendra Park Hotels
The company signed a 42-room resort under its Zone Connect brand near Puducherry, expected to commence operations in Q1 FY28.

Atlanta Electricals
The company received a ₹523.21 crore LOI from APTRANSCO for manufacturing and supplying 95 power transformers of 50 MVA capacity.

Bikaji Foods International
The company entered the premium bakery segment with the launch of Mahè under its subsidiary Bikaji Bakes, in partnership with master baker T K Khaleel.

Capri Global Capital
The company raised USD 30 million through a 36-month senior secured bond issuance from BlueOrchard, with proceeds earmarked for MSME lending.

Diamond Power Infrastructure
The company received two orders worth INR 488.18 crore from Adani Energy Solutions for 6,660 km of AL-59 conductors, taking cumulative Bhadla-Fatehpur project orders to INR 1,196 crore.

Eicher Motors
The company signed a non-binding MoU with Tamil Nadu government to invest INR 1,000 crore over seven years towards EV product development, technology and manufacturing.

KSB
The company received an INR 117 crore order from Triveni Turbines for 15 boiler feed pump sets and accessories for JSW Energy's Salboni power project, to be executed in FY28-29.

Larsen & Toubro
The company secured a significant order worth INR 1,000-2,500 crore to develop a 300 MW/900 MWh battery energy storage system at Khavda, Gujarat.

Sanathan Textiles
The company will commence Phase 2 at its Punjab facility in December, increasing capacity from 700 MTPD to 900 MTPD, with 80 MTPD starting initially.

Suzlon Energy
The company commenced construction of a 1 GW blade manufacturing facility in Thoothukudi, Tamil Nadu, entailing INR 200 crore investment, with commissioning expected in 12 months.

TVS Motor
The company signed a non-binding MoU with the Tamil Nadu government to invest INR 2,000 crore over the next four years.

Wipro
The company signed a strategic partnership with bp to transform its finance operations, with approximately 3,000 bp employees across three countries transitioning to Wipro in 2027.

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