23 November 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,800.60	286.30	1.12%
BSE Sensex	83,919.71	897.96	1.08%
GIFT Nifty*	25,912.00	166.50	0.65%
Dow Jones	48,147.33	-949.73	-1.93%
S&P 500	6,910.39	-265.44	-3.70%
NASDAQ Comp.	22,617.73	-1,261.47	-5.28%
FTSE 100	10,346.34	-106.34	-1.02%
CAC 40	7,927.75	-152.99	-1.89%
DAX	24,802.78	-661.03	-2.60%
Shanghai*	3,489.72	-44.07	-1.25%
Nikkei 225*	56,436.65	-3,007.56	-5.06%
Hang Seng*	22,070.00	-340.80	-1.52%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	83.08	-0.33	-0.40%
Oil (Brent)	92.13	-0.44	-0.48%
Gold	3,579.94	47.14	1.33%
Silver	41.73	0.53	1.29%
Copper	12,230.40	-338.75	-2.70%
Cotton	0.76	0.00	0.12%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.0965	-0.0002	-0.02%
USD/INR	92.67	-0.63	-0.68%
GBP/INR	121.44	-1.20	-0.98%
EUR/INR	101.69	-0.86	-0.83%
DXY Index	103.76	-0.16	-0.15%

VIX	Value	Change (Pts)	Change (%)
India	17.32	1.21	7.51%
S&P 500	35.89	7.45	26.20%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.18	-0.080
US 10-Year Yield	n/a	n/a

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 286 points higher at 25,801 on Friday.

Adani Energy Solutions

The company secured a 25-year power supply LoA from WBSEDCL for 1,750 MW renewable RTC power, with a 750 MW greenshoe option.

Ashoka Buildcon

The company received an LoA worth INR 1,465 crore from NHAI for an 8-lane Vadodara-Mumbai Expressway section and was declared L1 for two Jaipur Metro Phase-II projects worth INR 2,758 crore (including GST).

Berger Paints India Ltd.

The company signed an agreement to acquire 100% of industrial flooring maker Rocland Pvt Ltd for up to ₹18.80 Cr, including up to ₹3.00 Cr of earn-out, against Rocland's FY26 revenue of ₹15.94 Cr.

Premier Explosives

The company received an international export order worth INR 311 crore for manufacturing and supplying defence explosives, to be executed within 12 months.

Rossell Techsys

The company received a repeat international order worth over INR 50 crore from a major overseas space and satellite customer, to be executed within 4-6 months.

Shakti Pumps

The company invested INR 30.24 crore in its wholly owned subsidiary to establish a 2.20 GW solar DCR cell and PV module manufacturing plant in Madhya Pradesh.

SJVN

The company commissioned 45 MW of its 50 MW Sonitpur Solar Power Project in Assam through its wholly owned subsidiary.

Texmaco Rail

The company received two LOIs aggregating INR 230.58 crore from JSW Rail Infra Logistics and JSW (South) Rail Logistics for manufacturing and supplying 553 wagons.

Waaree Energies

The company's wholly owned subsidiary signed a PPA with SECI for a 700 MW solar project coupled with 700 MW/2,800 MWh energy storage in Solapur.

Welspun Living

The company approved INR 3,200 crore capex to add 29,000 MT terry towel, 15,000 MT weaving and 31,000 MT yarn capacity by December 2028.

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