

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,378.10	-198.50	-0.81%
BSE Sensex	78,516.49	-756.84	-0.95%
GIFT Nifty*	24,182.00	-182.00	-0.75%
Dow Jones	49,490.00	340.65	0.69%
S&P 500	7,137.90	73.89	1.05%
NASDAQ	24,657.60	397.60	1.64%
FTSE 100	10,476.50	-21.63	-0.21%
CAC 40	8,156.43	-79.29	-0.96%
DAX	24,194.90	-75.97	-0.31%
Shanghai*	4,094.83	-11.43	-0.28%
Nikkei 225*	58,956.70	-629.12	-1.06%
Hang Seng*	25,962.50	-200.75	-0.77%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	94.37	1.41	1.52%
Oil (Brent)	103.13	1.22	1.20%
Gold	4,727.20	-25.80	-0.54%
Silver	76.76	-1.21	-1.55%
Copper	13,196.85	-3.40	-0.03%
Cotton	0.77	0.00	0.31%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	-0.08%
USD/INR	93.14	0.21	0.22%
GBP/INR	125.76	0.02	0.01%
EUR/INR	109.54	-0.05	-0.04%
DXI Index	98.63	0.21	0.00%

VIX	Value	Change (Pts)	Change (%)
India	18.30	0.77	4.39%
S&P 500	18.92	-0.58	-2.97%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.92	0.030
US 10-Year Yield	4.32	0.021

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 198 points lower at 24,378 on Wednesday.

ACME Solar Holdings Limited

The company operationalized cumulative BESS capacity of 2 GWh (591 MW / 2,031 MWh) in Rajasthan, and plans to scale to 10 GWh by 2027.

Ajanta Pharma Limited

The company's Paithan, Maharashtra facility concluded a US FDA inspection with 5 Form-483 observations, to which it will respond within the stipulated timeline.

Associated Alcohols & Breweries Limited

The company received NCLT approval to acquire SDF Industries Ltd., a Thrissur-based distillery-cum-bottling unit with 3.60 lakh cases IMFL capacity and 75 lakh litre ENA capacity, for ₹30.85 crore.

Bharat Electronics Limited

The company secured orders worth ₹569 crore at the start of FY27, spanning avionics, EW systems, laser, communication, and tank sub-systems among others.

Larsen & Toubro Limited

The company's subsidiary L&T Energy GreenTech signed a long-term take-or-pay agreement to supply 3 lakh tonnes of green ammonia per annum to Japan's ITOCHU from its proposed Kandla facility.

PNC Infratech Limited

The company emerged as L1 bidder for 2 HAM-based NHAI highway projects on NH-927 in Uttar Pradesh with an aggregate bid project cost of ₹3,483 crore.

Premier Explosives Limited

The company received an international order for supply of defence products worth ₹350.23 crore, to be executed over 2 years.

Sunteck Realty Limited

The company reported FY26 revenue of ₹1,124 crore (+32% YoY), pre-sales of ₹3,157 crore (+25% YoY), and net cash flow surplus of ₹552 crore (+48% YoY), with net debt-to-equity at 0.06.

The Indian Hotels Company Limited

The company completed acquisition of a 51% stake in Brij Hospital Private Limited for up to ₹222 crore, making it a subsidiary of IHCL.

Trent

The company reported Q4 FY26 revenue growth of 20% and EBITDA growth of 43% YoY, approved a 1:2 bonus issue, and operates 1,250+ stores across 321 cities with 17.7 mn sqft footprint.

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ARETE Securities Ltd: Mittal Court, A-Wing, 10th Floor, Nariman Point, Mumbai - 400 021, Tel. No. : +91-022-4289 5600, Fax: +91 (22) 2657 3708/9

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