10 October 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,181.80	135.65	0.54%
BSE Sensex	82,172.10	398.45	0.49%
GIFT Nifty*	25,219.00	-5.00	+0.02%
Dow Jones	46,358.42	-243.36	-0.52%
S&P 500	6,735.11	-18.61	-0.28%
NASDAQ	23,024.63	-18.75	-0.08%
FTSE 100	9,509.40	-39.47	-0.41%
CAC 40	8,041.36	-18.77	-0.23%
DAX	24,611.25	14.12	0.06%
Shanghai*	3,934.84	52.07	1.34%
Nikkei 225*	48,128.22	-452.22	-0.93%
Hang Seng*	26,937.50	108.04	0.40%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.60	0.08	0.13%
Oil (Brent)	65.26	0.03	0.05%
Gold	3,984.40	8.10	0.20%
Silver	49.67	0.53	1.08%
Copper	10,738.00	95.00	0.89%
Cotton	0.64	0.01	1.27%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.35%
USD/INR	88.79	-0.01	-0.02%
GBP/INR	118.86	-0.15	-0.12%
EUR/INR	103.22	0.12	0.12%
DXY Index	99.35	0.54	0.01%

VIX	Value	Change (Pts)	Change (%)
India	10.12	-0.19	-1.84%
S&P 500	16.43	0.13	0.80%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.527	0.020
US 10-Year Yield	4.129	0.016

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 135 points higher at 25,181 on Thursday.

Afcons Infrastructure

The company secured a ₹576 crore contract for civil and allied infrastructure works, strengthening its project portfolio in the infrastructure segment.

Crompton Greaves Consumer Electricals

The company secured its first major ₹52 crore solar rooftop order in Telangana, marking strategic entry into India’s large solar market.

HPL Electric & Power

The company’s work order from Energy Efficiency Services was revised upward from ₹65.72 crore to ₹92 crore for additional smart meter supply.

KPI Green Energy

The company’s subsidiary Sun Drops Energia received Letters of Award to develop a 100 MW solar project under CPP segment turnkey scope.

Larsen & Toubro

The company won an ultra-mega order (₹15,000 crore+) in the Middle East to set up a Natural Gas Liquids plant with allied facilities in consortium with CCC.

Lemon Tree Hotels

The company opened Keys Lite by Lemon Tree Hotels, Jaipur, its 12th property in Rajasthan featuring 50 rooms, a restaurant, and fitness center.

Lloyds Engineering Works

The company signed an MoU with Poland-based FlyFocus to jointly develop and manufacture the Defender SIGINT UAV for defence and surveillance applications in India.

Marsons

The company received a ₹17.48 crore purchase order from Tarun Enterprise for supply of 33/11 KV, 10 MVA outdoor power transformers within six months.

NTPC Green Energy

The company’s subsidiary NTPC Renewable Energy signed an MoU with Gujarat Govt to develop 10 GW solar and 5 GW wind projects.

Rajesh Power Services

The company signed MoUs worth ₹4,754 crore with the Gujarat Government to execute turnkey underground power cable projects across the state.

RailTel

The company received an LoI worth ₹18.22 crore from Karnataka’s Centre for E-Governance for OEM support of existing KSWAN 2.0 routers and switches.

Samvardhana Motherson International

The company completed acquisition of an additional 20% stake in Youngshin Motherson Auto Tech, making it a wholly owned subsidiary.

Tata Consultancy Services

The company acquired 100% stake in US-based ListEngage for up to $72.8 million, strengthening Salesforce, AI advisory, and marketing cloud capabilities.

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