

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,658.4	308.0	1.32%
BSE Sensex	77,984.4	1,078.9	1.40%
GIFT Nifty*	23,763.5	+68.5	+0.29%
Dow Jones	42,583.3	598.0	1.42%
S&P 500	5,767.6	100.0	1.76%
NASDAQ Comp.	18,188.6	404.5	2.27%
FTSE 100	8,638.0	-8.8	-0.1%
CAC 40	8,022.3	-20.6	-0.26%
DAX	22,852.7	-39.0	-0.17%
Shanghai*	3,367.7	-2.3	-0.07%
Nikkei 225*	37,904.3	295.8	0.79%
Hang Seng*	23,905.6	215.8	0.91%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	69.1	0.0	-0.06%
Oil (Brent)	72.9	-0.1	-0.12%
Gold	3,011.9	0.1	0.00%
Silver	33.1	0.1	0.36%
Copper	9,813.5	-71.9	-0.73%
Cotton	0.66	0.00	0.41%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.08	0.00	-0.24
USD/INR	85.64	-0.35	-0.41
GBP/INR	110.99	-0.22	-0.19
EUR/INR	92.82	-0.27	-0.29
DX Index	103.95	-0.14	-0.14

VIX	Value	Change (Pts)	Change (%)
India VIX	13.70	1.13	8.98%
S&P 500 VIXApr 24	17.48	-1.8	-9.34%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.633	0.004
US 10-Year Yield	4.279	0.056

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 307 points higher at 23,658 on Monday.

Brigade Enterprises

The company acquired 4.4 acres in Whitefield, Bengaluru, for a premium residential project with a 0.6 million sq. ft. development potential and ₹950 crore GDV.

GNFC

The company signed an agreement with TKUIPL for a 2 lakh MTPA Weak Nitric Acid-III plant, increasing capacity by ~57% to meet downstream demand.

HCLTech

The company partnered with Western Union to drive financial services innovation, enhance AI-driven transformation, and establish a technology center in Hyderabad, India.

Imagicaaworld Entertainment

The company launched Aqua Imagicaa Water Park in Indore, Madhya Pradesh, spanning 18 acres with 20 rides, expanding its presence in central India.

Interarch Building Solutions

The company signed an MOU with Moldtek Technologies to collaborate on PEMB and structural steel projects, leveraging MTTL's Atlanta office for marketing.

J. Kumar Infraprojects

The company received LOA from CIDCO for designing and constructing a coastal road in Navi Mumbai worth ₹1,020.70 crore, excluding GST.

KRN Heat Exchanger

The company's subsidiary KRN HVAC Products received 'Approved Vendor' status from the Ministry of Railways for Oil Cooler Radiator for Converter Transformer.

RVNL

The company secured a ₹115 crore contract from Central Railway for OHE modification in Itarsi-Amla section, Nagpur division, to be executed in 24 months.

SEAMEC

The company secured a subcontract from Posh India Offshore for PRP-VIII & DUDP projects of ONGC worth \$5.61 million excluding GST.

Varun Beverages

The company commenced commercial production of carbonated soft drinks and packaged drinking water at its Kangra, Himachal Pradesh facility.

Wipro

The company introduced AI-driven autonomous agents for Agentforce, enhancing efficiency in healthcare operations by automating onboarding, credentialing, and provider verification.

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