

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,168.00	82.30	0.34%
BSE Sensex	77,409.98	254.36	0.33%
GIFT Nifty*	24,001.50	+12.5	+0.05%
Dow Jones	51,564.70	72.15	0.14%
S&P 500	7,500.58	80.48	1.08%
NASDAQ	26,517.90	496.28	1.91%
FTSE 100	10,399.70	-108.91	-1.04%
CAC 40	8,467.98	37.19	0.44%
DAX	25,026.80	92.13	0.37%
Shanghai**	4,090.48	-1.41	-0.03%
Nikkei 225*	71,155.20	101.68	0.14%
Hang Seng**	23,924.81	-387.35	-1.59%

\*As at 8.00 am

\*\* Market Holiday

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	76.14	-0.46	-0.60%
Oil (Brent)	79.68	-0.17	-0.21%
Gold	4,195.00	-50.90	-1.20%
Silver	64.66	-1.66	-2.51%
Copper	13,612.00	-123.85	-0.90%
Cotton	0.76	-0.01	-1.11%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.17%
USD/INR	94.28	-0.26	-0.28%
GBP/INR	124.85	-1.98	-1.56%
EUR/INR	108.22	-1.48	-1.35%
DX Index	100.86	0.52	0.01%

VIX	Value	Change (Pts)	Change (%)
India	12.67	-0.52	-3.94%
S&P 500	16.40	-2.04	-11.06%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.84	-0.020
US 10-Year Yield	4.46	-0.008

## 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 82 points higher at 24,168 on Thursday.

## Amber Enterprises India

The company signed manufacturing collaboration with Oppo India to manufacture mobile phones for OPPO, OnePlus and Realme brands in India.

## Bharat Coking Coal

The company handed over its 2.0 MTPA Dugdha Coal Washery to JSW Steel under India's first coal washery asset monetisation initiative.

## Bharat Forge

The company's subsidiary Kalyani Strategic Systems signed strategic partnership with AM General to offer 155mm mounted artillery gun systems globally and jointly pursue the U.S. Army Mobile Tactical Cannon program.

## Endurance Technologies

The company approved ₹62 crore investment to add four-wheeler lithium-ion battery pack capacity of 3,640 packs per month at its Pune facility, with commissioning targeted in Q3FY27.

## Lemon Tree Hotels

The company, through wholly owned subsidiary Carnation Hotels, opened its 13th operational hotel in Rajasthan, Lemon Tree Hotel Sri Ganganagar with 68 rooms, while 10 more hotels remain in the state pipeline.

## Lloyds Enterprises

The company, along with Lloyds Engineering Works and Streamland Estate, agreed to acquire 88.12% stake in Steel Infra Solutions for ~₹1,073.40 crore.

## Mahindra Lifespace Developers

The company's joint venture Mahindra Industrial Park Chennai signed YKK India for a ~149,936 sq. m manufacturing facility with planned investment of \$150 million.

## Man Industries

The company and its Saudi Arabia subsidiary National Pipe Company received pipe orders worth ~₹1,000 crore, executable within 6-9 months, taking consolidated order book to ~₹4,100 crore.

## Prestige Estates Projects

The company launched Phase 2 of Prestige Gardenia Estates in North Bengaluru comprising 195 plots across ~21 acres with revenue potential of ~₹400 crore, which was sold out at launch.

## Travel Food Services

The company entered into a 5-year license agreement with Bangalore International Airport to operate one F&B outlet at Terminal 1 of Kempegowda International Airport, Bengaluru.

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