12 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,471.70	-112.10	-0.46%
BSE Sensex	78,154.25	-388.19	-0.49%
GIFT Nifty*	24,559.50	+44.0	+0.18%
Dow Jones	53,791.90	-184.13	-0.34%
S&P 500	7,728.20	-24.91	-0.32%
NASDAQ	26,445.40	-159.91	-0.60%
FTSE 100	10,844.20	-18.31	-0.17%
CAC 40	8,714.94	-11.09	-0.13%
DAX	26,391.42	67.54	0.26%
Shanghai*	3,939.75	5.66	0.14%
Nikkei 225*	67,016.00	45.78	0.07%
Hang Seng*	25,363.50	-289.32	-1.13%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	83.82	0.62	0.75%
Oil (Brent)	89.46	0.55	0.62%
Gold	4,462.30	21.20	0.48%
Silver	65.38	0.44	0.68%
Copper	14,289.90	50.90	0.36%
Cotton	0.82	-0.01	-1.25%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.01%
USD/INR	95.44	0.13	0.14%
GBP/INR	128.89	0.28	0.21%
EUR/INR	110.12	-0.03	-0.03%
DXY Index	99.88	0.08	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.79	-0.46	-3.76%
S&P 500	15.28	-0.18	-1.16%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.78	0.010
US 10-Year Yield	4.68	0.000

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 112 points lower at 24,472 on Tuesday.

Bondada Engineering Ltd.

The company's subsidiaries won BESS orders of 200 MW/400 Mwh and a 100-tower BSNL contract, together worth ₹513.94 Cr.

Hindustan Construction Co. Ltd.

The company secured a contract worth ₹524.17 Cr from NHPC for work at the Salal Power Station in Jammu & Kashmir, spanning 27 months.

Kalpataru Projects International Ltd.

The company's board approved capital expenditure of up to ₹150 Cr for a new rolling mill at its Raipur plant.

RSWM Ltd.

The company signed a joint venture agreement with NDS9 for a 74:26 stake, investing about ₹186.30 Cr in a green garment facility.

Siemens Ltd.

The company reported Q1 FY27 revenue growth of 14.8% and completed the sale of its LVM business, booking a gain of ₹2,099 Cr.

Skipper Ltd.

The company allotted 92.23 lakh shares, raising approximately ₹433.50 Cr, following board approval of its Q1 FY27 results.

TCPL Packaging Ltd.

The company will invest ₹125 Cr through a subsidiary to enter lithium-ion battery separator film manufacturing, alongside Q1 FY27 revenue growth of 16%.

Tembo Global Industries Ltd.

The company commenced solar power generation at four sites in Maharashtra in August 2026, marking its entry into renewable energy operations.

United Drilling Tools Ltd.

The company's Q1 FY27 revenue rose 7.68% to ₹34.10 Cr, and it commissioned premium casing pipes in an Oil India gas well.

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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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