5 May 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,346.7	12.5	0.05%
BSE Sensex	80,502.0	259.8	0.32%
GIFT Nifty*	24,512.5	+109.0	+0.45%
Dow Jones	41,317.43	564.47	1.39%
S&P 500	5,686.67	82.53	1.47%
NASDAQ Comp.	17,977.73	266.99	1.51%
FTSE 100	8,596.35	99.55	1.17%
CAC 40 France	7,770.48 7,593.87	176.61 2.33%	2.33%
DAX	23,086.7	+589.67	+2.62%
Shanghai*	3,279.0	-7.6	-0.23%
Nikkei 225*	36,830.69	378.39	1.04%
Hang Seng*	22,504.68	385.27	1.74%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	56.1	-2.3	-3.97%
Oil (Brent)	59.3	-2.2	-3.50%
Gold	3,263.4	22.5	0.70%
Silver	32.0	0.0	0.03%
Copper	9,376.0	181.0	1.97%
Cotton	0.66	-0.01	-1.13%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.13	0.00	0.04
USD/INR	84.53	0.03	0.04
GBP/INR	112.53	-0.01	-0.01
EUR/INR	95.96	-0.06	-0.06
DXY Index	99.69	-0.56	-0.56

VIX	Value	Change (Pts)	Change (%)
India VIX	18.26	0.03	0.16%
S&P 500 VIXApr 24	22.68	-1.92	-7.80%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.355	-0.010
US 10-Year Yield	4.204	0.038

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 12 points higher at 24,346 on Friday.

Adani Green Energy

The company's step-down subsidiary signed a 400 MW grid-connected solar PV power project PPA with Uttar Pradesh Power Corporation Limited for supply from Rajasthan.

IndiaMART InterMESH

The company will invest ₹41 crore in Fleetx Technologies via 2,921 CCPS, acquiring 22.25% stake within 30 days in the AI-powered logistics SaaS platform.

Infosys

The company completed the acquisition of Australian cybersecurity firm The Missing Link to enhance its cybersecurity offerings and presence in Australia.

Ircon International

The company received a Letter of Acceptance from North Eastern Electric Power Corporation for constructing civil works at the Tato-I Hydro Electric Project in Arunachal Pradesh, valued at ₹458.14 crore for 45 months.

KNR Constructions

The company received approval for the NH-275 four-laning project, covering the 169 km to 195.55 km section in Karnataka under Hybrid Annuity Mode.

PVR INOX

The company launched its first Director's Cut at DLF Mall of India, Noida, with five auditoriums, 215 seats, and 27 screens across two properties in Noida.

RailTel Corporation of India

The company secured a ₹22.75 crore project order from North Central Railway to be executed by April 2026.

Reliance Power

The company's subsidiary, Reliance NU Suntech, signed a 25-year PPA with SECI to develop Asia's largest integrated solar and battery energy storage project, with a ₹10,000 crore investment.

Samvardhana Motherson

The company's subsidiary SMP Brasil completed the 100% acquisition of Brazil-based Baldi Industria E Comercio Ltda via SMRP B.V.

Tata Consultancy Services

The company partnered with Jazeera Airways for an AI-led digital revamp to unlock new revenue streams, enhance customer experience, and drive innovation in aviation.

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