9 September 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,635.10	-144.05	-0.61%
BSE Sensex	75,577.58	-555.23	-0.73%
GIFT Nifty*	23,666.50	-47.00	-0.20%
Dow Jones	52,786.10	-628.18	-1.18%
S&P 500	7,673.52	-45.08	-0.58%
NASDAQ	26,421.40	-85.58	-0.32%
FTSE 100	10,811.70	-10.47	-0.10%
CAC 40	8,317.98	11.83	0.14%
DAX	26,007.63	1.10	0.00%
Shanghai*	3,948.33	7.78	0.20%
Nikkei 225*	65,410.80	141.51	0.22%
Hang Seng*	25,287.00	-30.18	-0.12%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	94.41	1.38	1.48%
Oil (Brent)	99.38	1.46	1.49%
Gold	4,418.00	-21.00	-0.47%
Silver	66.72	-0.28	-0.42%
Copper	14,736.65	197.00	1.35%
Cotton	0.84	0.01	1.21%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.08%
USD/INR	94.82	0.32	0.34%
GBP/INR	128.31	0.41	0.32%
EUR/INR	110.13	0.33	0.30%
DXY Index	98.79	-0.06	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.16	0.00	0.00%
S&P 500	15.72	0.42	2.75%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.94	-0.020
US 10-Year Yield	4.80	-0.004

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 144 points lower at 23,635 on Tuesday.

Biocon
The company secured 100% allocation under Brazil’s 10-year PDP for Pertuzumab, providing exclusive access to ~70% of local demand, with milestone payments and revenue share.

Enviro Infra Engineers
The company’s step-down subsidiary, Suyog Urja, secured a ₹190 crore EPC contract from Tata Power Renewable Energy for NTPC’s 180 MW wind project at Parli, Maharashtra, with execution by Mar'27.

Fredun Pharmaceuticals
The company acquired pet-wellness brand Furlicks from USV and Wellbeing Nutrition, with plans to launch 44 new SKUs across two phases.

Great Eastern Shipping
The company contracted to acquire two secondhand Kamsarmax dry bulk carriers, including an 81,609-dwt 2019-built vessel, with both expected to join the fleet in Q3 FY27.

HCLTech
The company launched an Advanced Semiconductor Lab in Bengaluru with ₹185 crore investment, featuring 25,000 sq ft of cleanroom capacity for semiconductor testing and failure analysis.

Jupiter Wagons
The company secured a ₹97.66 crore order from GATX India for manufacturing and supplying BFNS22.9 rakes.

Schaeffler India
The company will consolidate FAG, INA, and LuK aftermarket brands under the Schaeffler brand, with the phased rollout beginning with FAG from Q2 2027.

Suzlon Energy
The company secured a 200 MW wind order from Ayana Renewable Power for 64 S144 WTGs in Madhya Pradesh, with EPC and O&M scope.

Torrent Power
The company commissioned 322 MWp of decentralized solar projects across Nashik, Maharashtra, under MSKVY 2.0, with power supplied to MSEDCL under a 25-year PPA.

Vishnu Chemicals
The company formed a 50:50 JV with DCX Chrome SAS to establish a 6,000 MTPA greenfield high-purity chromium metal plant in Visakhapatnam.

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ARETE SECURITIES LTD	SEBI REG. NOS.
NSE Capital Market	INZ000241036
NSE Future & Option	INZ000241036
NSE Currency Derivatives	INZ000241036
NSE Future & Option	INZ000241036
BSE Cash	INZ000241036
BSE Wholesale Debt Market	INZ000241036
BSE Currency Derivatives	INZ000241036
NSDL DP	DP ID IN303680
Research Analyst	INH100002615
Merchant Banker	INM000012740
Investment Advisor	INA000014614