1 April 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,331.40	-488.20	-2.14%
BSE Sensex	71,947.55	-1,635.67	-2.22%
GIFT Nifty*	22,769.00	+336.5	+1.50%
Dow Jones	46,341.50	1,125.37	2.49%
S&P 500	6,528.52	184.80	2.91%
NASDAQ	21,590.60	795.99	3.83%
FTSE 100	10,176.50	48.49	0.48%
CAC 40	7,816.94	44.49	0.57%
DAX	22,680.04	117.16	0.52%
Shanghai*	3,944.41	52.55	1.35%
Nikkei 225*	53,164.10	2,100.36	4.11%
Hang Seng*	25,271.49	483.34	1.95%

***As at 8.00 am**

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	102.60	1.22	1.20%
Oil (Brent)	105.26	1.29	1.24%
Gold	4,689.80	42.20	0.91%
Silver	75.02	0.10	0.13%
Copper	12,160.00	23.15	0.19%
Cotton	0.70	0.00	-0.09%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.39%
USD/INR	94.77	-0.05	-0.05%
GBP/INR	125.07	-0.44	-0.35%
EUR/INR	109.00	0.00	0.00%
DXY Index	99.79	-0.79	-0.01%

VIX	Value	Change (Pts)	Change (%)
India	27.89	1.09	4.07%
S&P 500	24.80	-0.22	-0.89%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.96	0.030
US 10-Year Yield	4.30	-0.014

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 488 points lower at 22,331 on Monday.

Adani Green Energy
The company operationalized 951 MW renewable projects in Rajasthan and Gujarat taking total operational capacity to 18,933.3 MW.

Bharat Electronics
The company secured ₹1,660 crore additional orders including satellite communication electronic warfare communication equipment avionics munitions EVM upgrades spares and services.

Bharat Heavy Electricals
The company received NTPC order for 3x800 MW Telangana STPP main plant package worth over ₹13,500 crore excluding GST to be executed in 62 months.

Enviro Infra Engineers
The company received ₹405.71 crore LOA from NTPC for EPC BESS projects at Tanda and Bongaigaon with 15-month execution and 11-year maintenance.

IREDA
The company signed JPY 28 billion ECB facility agreement with Sumitomo Mitsui Banking Corporation, Singapore including JPY 12 billion greenshoe option for 5 year unsecured borrowing.

JSW Steel
The company's JV partner JFE Steel invested ₹7,875 crore for 25% stake in JSW Kalinga with joint control established and further 25% acquisition planned.

Kwality Wall's (India)
The company became a 61.9% subsidiary of The Magnum Ice Cream Company following completion of stake acquisition from Unilever.

Lloyds Metals and Energy
The company's JV VLMH completed 100% acquisition of CHEMAF in DRC for up to $30 million with 20,000 TPA copper 4,000 TPA cobalt capacity.

NBCC
The company received LoI from Seychelles government to act as PMC for 1,008 housing units and infrastructure project worth $75 million funded by EXIM Bank.

Premier Energies
The company commissioned 5.6 GW solar module facility taking total capacity to 11.1 GW with G12R TOPCon 0BB panels and trial production commenced.

Signature Global
The company diluted 50% stake in Gurugram Commercity securing ₹1,293 crore to form JV for mixed use project with ₹14,000-16,000 crore value.

Welspun Corp
The company received ₹1,000 crore pipes supply order from US facility with consolidated order book at ₹24,700 crore to be executed across FY26, FY27 and FY28.

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