29 August 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,500.9	-211.2	-0.85%
BSE Sensex	80,080.6	-706.0	-0.87%
GIFT Nifty*	24,667.0	+41.0	+0.17%
Dow Jones	45,636.90	71.67	0.16%
S&P 500	6,501.86	20.46	0.32%
NASDAQ	21,705.16	115.02	0.53%
FTSE 100	9,216.82	-38.68	-0.42%
CAC 40	7,762.60	18.67	0.24%
DAX	24,039.9	-6.3	-0.03%
Shanghai*	3,866.1	+22.51	+0.59%
Nikkei 225*	42,714.35	-114.44	-0.27%
Hang Seng*	25,192.0	+193.18	+0.77%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	64.1	-0.2	-0.37%
Oil (Brent)	68.1	-0.2	-0.25%
Gold	3,413.0	-4.2	-0.12%
Silver	39.0	-0.1	-0.33%
Copper	9,703.5	21.5	0.22%
Cotton	0.66	0.01	0.99%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.27
USD/INR	87.62	-0.07	-0.08
GBP/INR	118.32	0.46	0.39
EUR/INR	102.08	-0.01	-0.01
DXY Index	97.99	-0.15	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	12.18	-0.02	-0.16%
S&P 500 VIXApr 24	14.43	-0.42	-2.83%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.557	-0.092
US 10-Year Yield	4.230	-0.070

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 211 points lower at 24,500 on Thursday.

Allcargo Logistics

The company reported July operational update with LCL volume at 774 cbm (+10% MoM, -5% YoY), FCL at 59,443 TEUs (+9% YoY), and air cargo at 3,690 tonnes (+28% MoM, +46% YoY).

Belrise Industries

The company incorporated a wholly-owned subsidiary named Belrise Defence & Aerospace to engage in defence, space, aerospace, and allied technology businesses.

CG Power and Industrial Solutions

The company's subsidiary CG Semi launched one of India's first OSAT facilities in Sanand with ₹7,600 crore investment for semiconductor packaging and testing.

Infosys

The company announced a strategic collaboration with Mastercard to integrate Infosys Finacle with Mastercard Move for faster, secure cross-border payment solutions for financial institutions globally.

Lemon Tree Hotels

The company signed a license agreement for Lemon Tree Hotel Mohkampur Dehradun with 98 rooms, managed by subsidiary Carnation Hotels.

NTPC

The company approved transfer of coal mining business to NTPC Mining for ₹10,503.27 crore and cleared ₹2,865.56 crore Rammam-III HEPP of 120 MW capacity.

Power Mech Projects

The company secured a ₹370.84 crore order from Mahan Energen for civil works and prefabricated steel erection for Mahan Phase-III 2x800 MW.

Sai Life Sciences

The company completed Phase II of PB-11 at its Bidar facility, expanding capacity by about 15% to approximately 700 KL.

Shakti Pumps (India)

The company received a Letter of Empanelment from MSEDCL for 34,720 off-grid solar pumps, with the first tranche of 10,000 units booked for ₹268.88 crore.

Tata Consultancy Services

The company partnered with Philippines-based Unilab to modernize core business systems through cloud migration using SAP S/4HANA on RISE platform.

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