

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,907.6	73.3	0.32%
BSE Sensex	75,449.1	147.8	0.20%
GIFT Nifty*	23,078.5	+88.5	+0.38%
Dow Jones	41,964.6	383.3	0.92%
S&P 500	5,675.3	60.6	1.08%
NASDAQ Comp.	17,750.8	246.7	1.41%
FTSE 100	8,706.7	1.4	0.02%
CAC 40	8,171.5	56.9	0.7%
DAX	23,288.1	-92.6	-0.40%
Shanghai*	3,414.2	-12.3	-0.36%
Nikkei 225*	37,751.9	-93.5	-0.25%
Hang Seng*	24,771.1	30.6	0.12%

*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	67.1	0.4	0.55%
Oil (Brent)	71.1	0.2	0.32%
Gold	3,051.6	1.7	0.05%
Silver	33.9	0.0	0.06%
Copper	9,914.0	61.2	0.62%
Cotton	0.67	0.00	0.33%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.09	-0.01	-0.53
USD/INR	86.43	-0.14	-0.16
GBP/INR	112.12	-0.42	-0.37
EUR/INR	94.22	-0.57	-0.60
DX Index	103.56	0.31	0.30

VIX	Value	Change (Pts)	Change (%)
India VIX	13.30	0.09	0.68%
S&P 500 VIX Apr 24	19.90	-1.8	-8.29%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.658	-0.024
US 10-Year Yield	4.289	-0.027

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 73 points higher at 22,907 on Wednesday.

HCLTech:

The company launched FlexSpace for AI PCs with Intel, enhancing enterprise efficiency by enabling secure, on-device AI processing with Core Ultra processors.

Indegene:

The company launched a new center in London to enhance consulting and commercialization solutions for Europe-based life sciences clients with an AI-first approach.

Insolation Energy:

The company's subsidiary secured its highest single sale order of ₹733.04 crore for Solar PV Modules from KPI Green Energy.

KPI Green Energy:

The company secured ₹272 crore from NaBFID to part-finance a 50MW hybrid power project with 75.2MWp solar and 16.95MW wind capacity in Gujarat.

L&T Technology Services:

The company launched TrackEi™, an AI-powered railway track inspection solution using NVIDIA Jetson for real-time defect detection and predictive maintenance.

NBCC:

The company successfully sold 1,046 residential units via e-auction at Aspire Centurian Park, Greater Noida (W) for ₹2,353 crore, earning a 1% marketing fee.

Steel Exchange India:

The company increased Billet plant capacity by 44.8% to 3.62 lakh TPA and Rolling Bar mill by 58.67% to 3.57 lakh TPA.

TCS:

The company signed a five-year deal with Air New Zealand to modernize its digital infrastructure, enhancing AI-driven innovation, operations, and customer experience.

Transrail Lighting:

The company secured new orders worth ₹1,647 crore in T&D and Railway businesses, including EPC Transmission Lines & Substations in overseas markets.

UltraTech Cement:

The company increased domestic grey cement capacity by 1.2 MTPA to 178.86 MTPA, taking global capacity to 184.26 MTPA.

Wipro:

The company launched agentic AI services using WeGA Studio and NVIDIA AI to enhance AI capabilities, local language LLMs, and public sector innovation.

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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

ARETE CAPITAL SERVICE PRIVATE LIMITED
 Mutual Fund Advisor
 AMFI Reg. No. 90796

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