3 October 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,836.3	225.2	0.92%
BSE Sensex	80,983.3	715.7	0.89%
GIFT Nifty*	24,930.5	-20.0	-0.08%
Dow Jones	46,519.72	78.62	0.17%
S&P 500	6,715.35	4.15	0.06%
NASDAQ	22,844.05	88.89	0.39%
FTSE 100	9,427.73	-18.7	-0.2%
CAC 40	8,056.63	89.68	1.13%
DAX	24,422.6	308.9	1.28%
Shanghai**	3,882.8	+20.25	+0.52%
Nikkei 225*	45,680.86	744.13	1.66%
Hang Seng*	27,068.0	-219.1	-0.80%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	60.7	0.0	0.02%
Oil (Brent)	64.3	0.0	0.02%
Gold	3,850.6	-6.0	-0.16%
Silver	46.8	-0.2	-0.34%
Copper	10,455.0	192.0	1.87%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	0.14
USD/INR	88.69	-0.10	-0.11
GBP/INR	119.43	0.05	0.04
EUR/INR	104.09	-0.22	-0.22
DXY Index	97.89	0.19	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.29	-0.78	-7.05%
S&P 500 VIXApr 24	16.63	0.34	2.09%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.530	-0.037
US 10-Year Yield	4.154	0.025

Market Updates

The markets are expected to open marginally lower today as trends in GIFT NIFTY indicate a negative start for the broader index after NIFTY closed 225 points higher at 24,836 on Wednesday.

Aditya Birla Real Estate

The company assigned leasehold rights of 104.47 acres of Jhagadia land from Birla Century division to UltraTech Cement for ₹93.01 crore.

BLS International Services

The company’s subsidiary BLS UK Hotels acquired 100% share capital of Trefeddian Hotel in the UK for ₹78.29 crore, expanding its hospitality portfolio.

H.G. Infra Engineering

The company’s subsidiary received a provisional appointed date from NHAI for 28.7 KM, 6-lane Varanasi-Ranchi-Kolkata highway project worth ₹925.11 crore.

Hyundai Motor India

The company commenced production of passenger vehicles at its Talegaon plant with 170,000 units annual capacity, enhancing manufacturing footprint in Maharashtra.

Indegene

The company acquired BioPharm, an Omnicom agency, to expand AI-driven marketing and AdTech capabilities for global pharmaceutical commercialization.

John Cockerill India

The company received a contract from Godawari Power & Ispat to supply a 6-Hi reversible cold rolling mill at Tilda, Raipur.

PTC Industries

The company’s subsidiary Trac Precision Solutions partnered with Coolbrook to supply 27,000 parts annually for its RotoDynamic Heater, driving industrial decarbonisation and long-term clean-tech growth.

Tata Motors

The company demerged its Commercial Vehicles business into TML Commercial Vehicles, consolidating Passenger Vehicles within the parent to operate as two independent entities.

Tata Power

The company’s subsidiary TPREL signed a PPA with Tata Power Mumbai Distribution to set up an 80 MW firm renewable energy project.

Waaree Energies

The company approved ₹8,000 crore for expanding lithium-ion cell and BESS capacity to 20 GWh, plus electrolyser and inverter capacity expansions.

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