8 September 2025

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,741.0	6.7	0.03%
BSE Sensex	80,710.8	-7.3	-0.01%
GIFT Nifty*	24,897.5	+55.5	+0.22%
Dow Jones	45,400.86	-220.43	-0.48%
S&P 500	6,481.50	-20.58	-0.32%
NASDAQ	21,700.39	-7.31	-0.03%
FTSE 100	9,208.21	-8.66	-0.09%
CAC 40	7,674.78	-24.14	-0.31%
DAX	23,597.0	-173.4	-0.73%
Shanghai*	3,821.1	+8.57	+0.22%
Nikkei 225*	43,707.79	689.04	1.6%
Hang Seng*	25,512.0	+94.02	+0.37%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.5	0.6	0.90%
Oil (Brent)	66.2	0.6	0.84%
Gold	3,590.3	3.6	0.10%
Silver	40.7	-0.3	-0.78%
Copper	9,881.0	68.0	0.69%
Cotton	0.65	0.00	0.09%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.42
USD/INR	88.26	0.10	0.11
GBP/INR	118.98	0.50	0.42
EUR/INR	103.16	0.52	0.50
DXY Index	97.83	-0.46	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	10.78	-0.07	-0.65%
S&P 500 VIXApr 24	15.18	-0.12	-0.78%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.461	-0.051
US 10-Year Yield	4.161	-0.033

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 7 points higher at 24,741 on Friday.

Adani Power

The company signed agreements with Druk Green Power to develop a 570 MW Wangchhu hydroelectric project in Bhutan with ₹6,000 crore investment.

Aegis Logistics

The company added 61,000 KL storage capacity at Pirpau, Mumbai Port with ₹99.88 crore investment funded through internal accruals.

Amber Enterprises India

The company’s subsidiary ILJIN Electronics secured ₹1,200 crore funding from ChrysCapital and InCred to drive expansion, acquisitions, and electronics manufacturing growth.

Ceigall India

The company received LoI from MSEDCL for 147 MW solar power projects under Mukhyamantri Saur Krushi Vahini Yojana 2.0 in Maharashtra.

HFCL

The company secured export orders worth $40.65 million (₹358.38 crore) for supplying optical fiber cables through its overseas subsidiary.

PNC Infratech

The company emerged as L1 bidder for ₹495.54 crore EPC contract to construct high-level bridge and approach road in Bihar.

Powergrid

The company was declared a successful bidder to develop ISTS for evacuating power from pumped storage projects in Sonbhadra, Uttar Pradesh on BOOT basis.

Saregama India

The company approved incorporation of a wholly owned subsidiary in Dubai Mainland named Saregama Performing Arts and Music Festivals LLC with initial capital up to AED 1 million.

Shyam Metalics and Energy

The company reported strong pellet sales growth of 216% YoY and 56% MoM, while stainless steel volumes rose 32.8% despite lower realisations.

TCS

The company partnered with the Odisha Government to build AI-enabled IFMS 3.0 using cloud-native architecture and deploy its AI Workbench for advanced automation.

Time Technoplast

The company signed an MoU to acquire 74% in Ebullient Packaging, valued at ₹200 crore, strengthening industrial packaging portfolio and expanding growth opportunities.

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