5 February 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,776.00	48.45	0.19%
BSE Sensex	83,817.69	78.55	0.09%
GIFT Nifty*	25,817.00	-20.50	-0.08%
Dow Jones	49,501.30	260.31	0.53%
S&P 500	6,882.72	-35.09	-0.51%
NASDAQ	22,904.58	-350.61	-1.51%
FTSE 100	10,402.34	87.75	0.85%
CAC 40	8,262.16	82.66	1.01%
DAX	24,603.04	-177.75	-0.72%
Shanghai*	4,066.52	- 35.69	- 0.87%
Nikkei 225*	53,992.04	-301.32	-0.55%
Hang Seng*	26,572.31	- 275.01	- 1.02%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.86	-1.28	-1.97%
Oil (Brent)	67.92	-1.03	-1.49%
Gold	4,934.91	-29.28	-0.59%
Silver	82.24	-6.12	-6.93%
Copper	13,247.00	-48.00	-0.36%
Cotton	0.62	0.00	+0.02%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.18	0.00	-0.03%
USD/INR	90.42	0.15	0.17%
GBP/INR	123.95	0.59	0.48%
EUR/INR	106.82	0.37	0.35%
DXY Index	97.74	0.30	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.25	-0.64	-4.96%
S&P 500	18.64	0.64	3.56%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.708	-0.014
US 10-Year Yield	4.276	-0.011

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 48 points higher at 25,776 on Wednesday.

Berger Paints India

The company commenced commercial production at its fully automated resin manufacturing facility in Hindupur with 12,000 MT annual capacity following ₹78 crore investment.

Bharat Heavy Electricals

The company received an LOI from Hindalco for 2 x 150 MW BTG package for Aditya Aluminium expansion in Odisha worth ₹1,200–1,500 crore.

Century Plyboards

The company approved setting up a plywood and MDF unit in Uttar Pradesh adding 90,000 CBM plywood capacity and 3,30,000 CBM MDF capacity with ~₹1,130 crore investment.

Coal India

The company approved ₹3,132.96 crore equity infusion in a 50:50 JV with DVC, ₹3,189.54 crore equity investment in subsidiary BCGCL, incorporation of an intermediate holding company in Chile and formation of a 51:49 renewable energy JV with UPRVUNL in Uttar Pradesh.

Marico

The company entered definitive agreements to acquire 60% stake in Cosmix Wellness for ₹225.67 crore, expanding its presence in premium digital-first wellness and nutrition categories.

Mishra Dhatu Nigam

The company secured an order worth ₹158 crore, taking its open order book to around ₹2,590 crore.

Newgen Software Technologies

The company executed a three year AED 5.31 million contract via its Dubai subsidiary with a UAE government entity for software licenses implementation and support services.

Oriental Rail Infrastructure

The company corrected the order value in the February 04 board meeting outcome to ₹1,960.15 crore from ₹1,376.27 crore with no other changes.

Royal Orchid Hotels

The company sold 100% stake in subsidiary Multi Hotels to Greenleaf Properties for $3.41 million, with the entity ceasing to be a subsidiary post-transaction.

Waaree Energies

The company received an order through subsidiary Waaree Solar Americas to supply 150 MW solar modules to an international IPP during 2026–27.

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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

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