1 October 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,611.1	-23.8	-0.10%
BSE Sensex	80,267.6	-97.3	-0.12%
GIFT Nifty*	24,757.5	-4.0	-0.02%
Dow Jones	46,397.89	81.82	0.18%
S&P 500	6,688.46	27.25	0.41%
NASDAQ	22,660.01	68.86	0.3%
FTSE 100	9,350.43	50.59	0.54%
CAC 40	7,895.94	15.07	0.19%
DAX	23,880.7	135.7	0.57%
Shanghai**	3,882.8	+20.25	+0.52%
Nikkei 225*	44,425.96	-506.67	-1.13%
Hang Seng**	26,855.6	+232.68	+0.87%

As at 8.00 am ** Market Holiday

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.5	0.1	0.13%
Oil (Brent)	66.2	-0.9	-1.31%
Gold	3,866.0	7.5	0.20%
Silver	47.4	0.8	1.61%
Copper	10,300.0	67.0	0.65%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.17
USD/INR	88.77	0.00	0.00
GBP/INR	119.34	0.12	0.10
EUR/INR	104.31	0.30	0.29
DXY Index	97.83	-0.09	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.07	-0.30	-2.64%
S&P 500 VIXApr 24	16.28	0.16	0.99%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.567	-0.002
US 10-Year Yield	4.129	-0.012

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 23 points lower at 24,611 on Tuesday.

Allied Blenders and Distillers
The company commissioned a ₹115 crore PET bottling unit in Rangapur with 600 million bottles capacity to boost efficiency, self-reliance and margins.

Ashoka Buildcon
The company sold 100% stakes in five SPVs for ₹1,146 crore to Infrastructure Yield Trust schemes, continuing portfolio monetization efficiently.

Bharat Heavy Electricals
The company received Notifications of Award from MPPGCL for EPC contracts of two 660 MW supercritical thermal power plants worth ₹13,000-15,000 crore.

Ceigall India
The company’s subsidiary received a ₹225 crore Bulk Drug Park project from HPSIDC at Una and a ₹981 crore Ludhiana–Bathinda highway project from NHAI.

G R Infraprojects
The company acquired Rajgarh Neemuch Power Transmission as a wholly owned subsidiary to execute 2 RE power evacuation projects in Madhya Pradesh.

Infibeam Avenues
The company completed the slump sale of its platform business to subsidiary Rediff, raising stake to 82.66% and transferring Infibeam Projects Management.

Jindal Steel
The company commissioned a 3 MTPA Basic Oxygen Furnace at Angul, raising total steelmaking capacity to 9 MTPA and enhancing integrated throughput.

KNR Constructions
The company received ₹72.8 crore LOA from Greater Hyderabad Municipal Corporation to build twin 3-lane flyovers at Kukatpally Y-junction in Telangana.

Power Mech Projects
The company issued a corporate guarantee of ₹455 crore for its subsidiary DRRPPL to secure bank financing, creating a contingent liability.

Powergrid
The company was declared a successful bidder under TBCB for developing inter-regional transmission systems between SR and WR grids on BOOT basis.

Quality Power Electrical Equipments
The company received a ₹13.94 crore international order to supply high voltage air core reactors, executable within 18 months.

Tata Motors
The company invested ₹120 crore in Freight Tiger via Series C CCPS and bought shares worth ₹14 crore, raising its stake to 42-46%.

Waaree Energies
The company commenced operations at its newly set up 950 MW solar module manufacturing facility at Degam, Navsari, strengthening domestic renewable energy production.

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