Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,637.8	88.8	0.35%
BSE Sensex	84,058.9	303.0	0.36%
GIFT Nifty*	25,764.5	-17.0	-0.07%
Dow Jones	43,819.27	432.43	1%
S&P 500	6,173.07	32.05	0.52%
NASDAQ	20,273.46	105.55	0.52%
FTSE 100	8,798.91	63.31	0.72%
CAC 40	7,691.55	134.24	1.78%
DAX	24,033.2	383.9	1.62%
Shanghai*	3,431.2	+6.97	+0.20%
Nikkei 225*	40,823.61	672.82	1.68%
Hang Seng*	24,154.5	-129.7	-0.53%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	65.1	0.1	0.09%
Oil (Brent)	66.5	-0.8	-1.22%
Gold	3,279.5	5.6	0.17%
Silver	36.1	0.0	0.11%
Copper	10,051.0	-64.0	-0.63%
Cotton	0.68	0.04	6.35%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.22
USD/INR	85.48	-0.23	-0.27
GBP/INR	117.46	-0.35	-0.30
EUR/INR	100.11	-0.40	-0.40
DXY Index	97.25	0.10	0.10

VIX	Value	Change (Pts)	Change (%)
India VIX	12.39	-0.20	-1.59%
S&P 500 VIXApr 24	16.32	-0.27	-1.63%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.364	-0.004
US 10-Year Yield	4.275	-0.002

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 88 points higher at 25,637 on Friday.

Adani Enterprises
The company's JV AdaniConneX acquired 100% stake in Granthik Realtors for ₹85.99 crore to support infrastructure development initiatives.

Amber Enterprises
The company's subsidiary ILJIN signed definitive agreements to acquire a majority stake in Power-One Micro Systems, a BESS, solar inverter and EV charger firm.

BHEL
The company received Rs 6,500 crore order from Adani Power for 6 thermal units of 800 MW.

Biocon
The company's subsidiary Biocon Biologics got Health Canada nod for Yesafili, biosimilar to Eylea, treating retinal diseases, launching in July.

Cochin Shipyard
The company secured a ₹100–250 crore notable order from Polestar Maritime to build two 70T Bollard Pull Tugs by 2027.

Hindustan Copper
The company signed an MoU with IOCL to jointly pursue auctions, mining, and processing of copper and critical mineral assets.

L&T Technology Services
The company opened an engineering design center in Plano, Texas focused on AI, defense, cybersecurity, and smart city solutions.

Mahindra Lifespace Developers
The company was appointed preferred developer for ₹1,250 crore premium housing society redevelopment project on 3.08 acres in Mulund, Mumbai.

Mazagon Dock Shipbuilders
The company approved acquiring 51%+ stake in Colombo Dockyard for up to $52.96 million (~₹452 crore) to expand shipbuilding presence.

NLC India
The company received a LoA from NTPC to set up a 450 MW ISTS wind-solar hybrid project at Bikaner and Bhuj under a 25-year PPA.

NTPC
The company's stepdown subsidiary NTPC REL declared COD for 142.2 MW and 146.7 MW at two Khavda solar projects in Gujarat.

Samvardhana Motherson
The company approved issuance and allotment of ₹2,025 crore listed unsecured NCDs at 6.80% coupon on private placement, to be listed on BSE.

Titagarh Rail Systems
The company's consortium with Firema received ₹430.53 crore order for 12 additional train sets for Pune Metro from Maha Metro.

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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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