Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	26,140.75	-37.95	-0.14%
BSE Sensex	84,961.14	-102.20	-0.12%
GIFT Nifty*	26,191.50	-35.00	-0.13%
Dow Jones	48,996.08	-466	-0.94%
S&P 500	6,920.93	-23.89	-0.34%
NASDAQ	23,584.27	37.1	0.16%
FTSE 100	10,048.21	-74.52	-0.74%
CAC 40	8,233.92	-3.51	-0.04%
DAX	25,122.26	230.06	0.92%
Shanghai*	4,084.17	-1.60	-0.04%
Nikkei 225*	51,748.48	-213.5	-0.41%
Hang Seng*	26,078.00	-380.95	-1.44%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	56.36	0.37	0.66%
Oil (Brent)	60.35	-0.04	-0.07%
Gold	4,454.90	-7.60	-0.17%
Silver	78.26	0.64	0.83%
Copper	13,269.50	385.50	2.99%
Cotton	0.65	0.00	-0.03%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	-0.03%
USD/INR	89.88	-0.30	-0.33%
GBP/INR	121.30	-0.77	-0.63%
EUR/INR	105.02	-0.61	-0.57%
DXY Index	98.76	0.14	0.00%

VIX	Value	Change (Pts)	Change (%)
India	9.95	-0.07	-0.70%
S&P 500	15.38	0.63	4.27%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.620	-0.009
US 10-Year Yield	4.148	-0.029

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 37 points lower at 26,140 on Wednesday.

Adani Green Energy
The company's subsidiary signed power consumption and investment agreements to supply 20.8 MW solar wind hybrid power to Asahi India Glass from Khavda Gujarat.

CMS Info Systems
The company secured a ₹1,000 crore 10-year cash outsourcing contract from SBI covering about 5,000 bank-owned ATMs across India.

HUDCO
The company signed a non-binding MoU with the Government of Chhattisgarh to potentially provide financial assistance up to ₹1,00,000 crore over five years for housing and infrastructure projects.

Info Edge (India)
The company reported standalone billings of ₹747.2 crore for the quarter and ₹2,120.4 crore for nine months led by recruitment solutions.

InterGlobe Aviation
The company inducted its first A321XLR to operate Athens routes and expects 9 of 40 ordered aircraft deliveries in CY26.

PTC Industries
The company received an order from ISRO's VSSC to convert 40 tonnes of Grade 1 titanium sponge into Ti-6Al-4V alloy ingots using Double VAR process.

Royal Orchid & Regenta Hotels
The company signed a management agreement for 60-key Regenta Suites & Residences Jaipur, an asset-light addition developed by SSBC Group.

Samvardhana Motherson
The company completed formation of its joint venture with South Korea's Egtronics to develop and manufacture clean mobility vehicle electronics with 51% ownership.

The Tata Power Company
The company's subsidiary TP Solar produced 2.8 GW solar cells and 2.9 GW modules in nine months FY26 driven by capacity ramp-up.

Unimech Aerospace and Manufacturing
The company's wholly owned subsidiary received orders worth ₹72.20 crore from Nuclear Power Corporation of India Limited.

Welspun Corp
The company received an export order for coated line pipes for Americas taking additional India orders to ₹3,100 crore and global order book to ₹23,460 crore.

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