18 September 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,270.60	53.00	0.23%
BSE Sensex	74,314.59	-21.86	-0.03%
GIFT Nifty*	23,338.50	+5.5	+0.02%
Dow Jones	51,778.00	316.14	0.61%
S&P 500	7,637.76	85.95	1.14%
NASDAQ	26,418.30	439.87	1.69%
FTSE 100	10,816.10	127.67	1.19%
CAC 40	8,186.93	46.34	0.57%
DAX	25,716.71	178.96	0.70%
Shanghai*	3,904.81	29.21	0.75%
Nikkei 225*	64,562.80	426.52	0.67%
Hang Seng*	24,768.50	164.20	0.67%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	101.36	-0.55	-0.54%
Oil (Brent)	104.12	-0.70	-0.67%
Gold	4,388.20	-11.50	-0.26%
Silver	66.24	0.14	0.21%
Copper	14,000.40	-225.45	-1.58%
Cotton	0.78	-0.02	-2.52%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	0.15%
USD/INR	95.85	-0.11	-0.11%
GBP/INR	128.40	-0.84	-0.65%
EUR/INR	110.03	-0.70	-0.63%
DXY Index	100.22	-0.07	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.29	-0.88	-6.68%
S&P 500	15.44	-2.27	-12.82%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.05	0.000
US 10-Year Yield	4.93	-0.014

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 53 points higher at 23,271 on Thursday.

Asian Paints
The company commenced commercial production at its 150,000 tpa VAE manufacturing facility in Dahej, Gujarat, primarily for captive consumption, while VAM and ethylene facilities remain under construction.

Avenue Supermarts
The company opened a new DMart store in Dharwad, Karnataka, taking its total store count to 510.

Bharat Electronics
The company secured additional defence orders worth ₹648 crore since 26 Aug'26, including laser-based IR jammers, communication equipment, cybersecurity solutions, thermal imagers, TR modules, upgrades, spares, and services.

Diamond Power Infrastructure
The company received a ~₹263 crore order from a domestic EPC contractor for supply of MV/LV XLPE cables, overhead conductors, and control cables for an MSEDCL project in Maharashtra.

GPT Infraprojects
The company secured a ₹483.72 crore railway bridge order from RVNL, with execution over 1,095 days from the appointed date.

Juniper Green Energy
The company fully commissioned its 75 MW wind-solar hybrid project under PPA with Tata Power, taking aggregate operational capacity to ~2,725 MWp and BESS capacity to ~500 MWh.

Petronet LNG
The company approved a 50:50 JV with Gruner Renewable Energy to establish 10 CBG plants of 18 MTPD each across India, with total capex of ~₹1,200 crore.

Prestige Estates
The company launched Garden Breeze at The Prestige City, Sarjapur, Bengaluru, comprising 655 apartments across ~0.93 mn sq ft, with GDV of ~₹1,100 crore.

PTC India
The company incorporated a JV with NLC India Renewables, with PTC holding 26% and NLC Renewables 74%, to develop green energy projects and explore related opportunities.

Puravankara
The company secured redevelopment rights for three residential societies in Goregaon West, Mumbai, spanning 4.68 acres with ~1.05 mn sq ft developable potential and GDV of ~₹2,600 crore.

Time Technoplast
The company completed a greenfield plant at Bhilad, Gujarat, with 6,000-tonne annual capacity and ₹24 crore investment, with production scheduled to commence from Sep'26.

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