7 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,636.00	11.35	0.05%
BSE Sensex	78,954.76	373.76	0.48%
GIFT Nifty*	24,648.00	-100.00	-0.40%
Dow Jones	53,885.10	-464.02	-0.85%
S&P 500	7,709.96	-13.59	-0.18%
NASDAQ	26,348.40	-15.09	-0.06%
FTSE 100	10,867.90	-20.41	-0.19%
CAC 40	8,699.71	30.41	0.35%
DAX	26,140.13	13.83	0.05%
Shanghai*	3,901.54	1.19	0.03%
Nikkei 225*	65,135.30	-547.99	-0.83%
Hang Seng*	25,445.50	-84.78	-0.33%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	78.10	0.81	1.05%
Oil (Brent)	83.48	0.99	1.20%
Gold	4,316.60	17.00	0.40%
Silver	62.42	0.81	1.32%
Copper	14,167.25	-22.75	-0.16%
Cotton	0.80	-0.02	-1.98%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.26%
USD/INR	95.22	0.09	0.09%
GBP/INR	128.13	0.02	0.02%
EUR/INR	109.87	0.09	0.08%
DXY Index	99.96	0.29	0.00%

VIX	Value	Change (Pts)	Change (%)
India	12.16	0.10	0.83%
S&P 500	15.15	-0.66	-4.17%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.77	0.000
US 10-Year Yield	4.68	0.008

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 11 points higher at 24,636 on Thursday.

Afcons Infrastructure
The company received an LoA from BMC for a ₹1,918 crore desalinated water conveyance tunnel project in Mumbai, including GST and O&M.

CESC
The company’s subsidiary, Purvah Green Power, received an LOA from SECI for setting up a 175 MW grid-connected wind power project, with power supply tenure of 25 years at a tariff of ₹3.85/kWh.

Coal India
The company emerged as preferred bidder for the Gadadharpur Iron Ore Block in Odisha, with estimated resources of 288 MT and mining lease execution timeline of up to 3 years.

Deepak Nitrite
The company’s subsidiary, DCTL, commissioned its MIBK and MIBC plant, along with associated utilities and infrastructure, at Dahej, Gujarat, with total capex of ~₹735 crore.

GPT Infraprojects
The company's wholly owned subsidiary, Alcon Builders and Engineers, was declared L1 bidder for a ₹72.5 crore Eastern Railway signalling contract.

J. Kumar Infraprojects
The company secured a ₹990 crore EPC order from Karnataka Housing Board for construction of an international cricket stadium and allied works in Bengaluru, with execution over 36 months.

KSB
The company approved a ~20% capacity expansion at its Shirwal plant through construction of an additional manufacturing shed, involving investment of ~₹40 crore, with commissioning targeted by 2027.

Powerica
The company received a LoA from SECI for a 100 MW wind power project in Gujarat, with power supply contracted at ₹3.85/kWh for 25 years and project commissioning targeted within 24 months of PPA execution.

PTC Industries
The company’s subsidiary, Aerolloy Technologies, signed an agreement with Airbus for development, qualification, and supply of Titanium castings for A320neo, A330neo, and A350 programmes, enabling integrated material-to-component aerospace manufacturing.

RailTel
The company received a ₹37.7 crore order from North Western Railway for deployment of 4x48F OFC to support the Indigenous Train Collision Avoidance System across the Ajmer division, with execution by Aug'27.

SEPC
The company secured a ₹854.6 crore LoA from SAIL-ISP Burnpur for Pellet Plant BOP, including civil and structural works under the 4.08 MTPA crude steel expansion project, with execution over ~32 months.

Swan Defence and Heavy Industries
The company secured a Category 2 order from Svitzer A/S, Denmark, for construction of four TRAnsverse 3200 tugs, with order value in the ₹251-₹750 crore range.

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