

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,151.10	-488.05	-2.06%
BSE Sensex	74,563.92	-1,470.50	-1.93%
GIFT Nifty*	23,309.50	+106.5	+0.46%
Dow Jones	46,558.47	-119.38	-0.26%
S&P 500	6,632.19	-40.43	-0.61%
NASDAQ	22,105.36	-206.62	-0.93%
FTSE 100	10,261.15	-44.00	-0.43%
CAC 40	7,911.53	-72.91	-0.91%
DAX	23,447.29	-142.36	-0.60%
Shanghai*	4,075.00	-20.45	-0.50%
Nikkei 225*	53,275.50	-531.61	-0.96%
Hang Seng*	25,563.00	97.39	0.38%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	99.13	+0.42	+0.43
Oil (Brent)	104.31	+1.17	+1.13
Gold	5,005.58	-16.19	-0.32
Silver	79.50	-0.85	-1.06
Copper	12,757.75	-0.25	-0.00
Cotton	0.67	+0.01	+1.52

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.14%
USD/INR	92.16	0.12	0.13%
GBP/INR	123.28	-0.20	-0.17%
EUR/INR	106.38	-0.32	-0.30%
DXY Index	100.26	0.57	-0.37%

VIX	Value	Change (Pts)	Change (%)
India VIX	22.65	1.13	5.25%
S&P 500 VIXApr 24	27.19	-0.10	-0.37%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.68	0.010
US 10-Year Yield	4.22	0.063

## 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 488 points lower at 23,151 on Friday.

## ACME Solar Holdings

The company commissioned 142.67 MW or 481.49 MWh BESS in Rajasthan as phase one of its planned 585 MW or 2,011.24 MWh battery storage capacity.

## Aurionpro Solutions

The company secured a ~₹350 crore multi year order from a hyperscale data centre operator for design engineering and end to end MEP execution of an AI ready green data centre in India.

## Bondada Engineering

The company's subsidiary Bondada Green Engineering received a ₹35.40 crore order from Pratap Technocrats for supply of 40M towers including hardware, foundation bolts and templates to be executed by October 2026.

## Dilip Buildcon

The company emerged L1 bidder for a ₹160.20 crore EPC project from OBCCL for construction of diversion road on Duduka Gopalpur Toparia Road in Sundargarh with 18 month completion period.

## Godrej Properties

The company acquired a ~44 acre land parcel in Coimbatore to develop a plotted residential project with ~1.1 million sq ft developable potential and estimated revenue potential of ₹450 crore.

## GMR Airports

The company received LOA from Delhi International Airport to upgrade, modernize, operate and maintain Cargo Terminal 1 at IGI Airport under a revenue share model with estimated ₹340 crore share in the first full year.

## HFCL

The company through its overseas wholly owned subsidiary signed a five year OFC supply agreement with a global multinational corporation with total potential value of about \$1.10 billion equivalent to ₹10,159 crore.

## Oil India

The company's 654 km Numaligarh Siliguri product pipeline capacity was augmented from 1.72 MMTPA to 5.5 MMTPA under a ₹750 crore brownfield project.

## RailTel Corporation of India

The company received a ₹29.90 crore order from Uttar Pradesh Police Recruitment and Promotion Board to provide security related ancillary services for recruitment examinations.

## Tata Motors

The company received cumulative orders for over 5,000 buses and bus chassis from multiple State Transport Undertakings across India through competitive e bidding with phased deployments.

## VA Tech Wabag

The company as JV leader secured a mega order above ₹1,000 crore from CMWSSB to develop a looped water transmission network for Greater Chennai under the ADB funded CCRWSSP with 54 months execution and 10 years O&M

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