Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE
Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,046.15	-62.15	-0.25%
BSE Sensex	81,773.66	-153.09	-0.19%
GIFT Nifty*	25,148.00	+55.5	+0.22%
Dow Jones	46,601.78	-1.2	0%
S&P 500	6,753.72	39.13	0.58%
NASDAQ	23,043.38	255.02	1.12%
FTSE 100	9,548.87	65.29	0.69%
CAC 40	8,060.13	85.28	1.07%
DAX	24,597.13	211.35	0.87%
Shanghai*	3,914.04	31.26	0.81%
Nikkei 225*	48,351.68	616.69	1.29%
Hang Seng*	26,746.00	-83.46	-0.31%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	62.12	-0.17	-0.27%
Oil (Brent)	65.89	-0.19	-0.29%
Gold	4,011.85	-27.05	-0.67%
Silver	48.78	-0.12	-0.25%
Copper	10,738.00	95.00	0.89%
Cotton	0.64	-0.01	-0.95%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.33%
USD/INR	88.79	0.01	0.01%
GBP/INR	119.03	-0.30	-0.25%
EUR/INR	103.11	-0.45	-0.44%
DXY Index	98.76	0.16	0.00%

VIX	Value	Change (Pts)	Change (%)
India	10.31	0.26	2.59%
S&P 500	16.30	-0.94	-5.45%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.507	-0.003
US 10-Year Yield	4.113	-0.055

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 62 points lower at 25,046 on Wednesday.

ABB India
The company shared ABB Group's plan to divest its Robotics division to SoftBank for $5.375 billion, aiming to enhance AI-driven robotics leadership.

Adani Enterprises
The company approved raising up to ₹3,000 crore through issuance of NCDs via permissible modes including private placement, public issue, or institutional placement.

Centum Electronics
The company signed an MoU with GRSE to jointly develop advanced indigenous naval navigation systems, enhancing R&D, manufacturing, and modernization for the Indian Navy.

Escorts Kubota
The company plans to invest up to ₹2000 crore in Haryana to expand manufacturing and R&D facilities for agriculture and construction equipment.

G R Infraprojects
The company received ₹290.23 crore LOA from State Highways Authority of Jharkhand for constructing 26.67 km Giridih Bypass on EPC mode.

HFCL
The company secured export orders worth ~$34.19 million (₹303.35 crore) for supplying optical fiber cables through its overseas subsidiary to an international customer.

Infibeam Avenues
The company's backed Phronetic AI launched PayCentral.ai, India's first Agentic Payment Platform enabling autonomous, secure, and auditable AI-driven transactions for merchants and enterprises.

Interarch Building Solutions
The company will set up a ₹70 crore, 40,000 MT PEB manufacturing facility in Kheda, Gujarat, enhancing domestic and export capabilities.

JSW Cement
The company commissioned a 1.0 MTPA grinding unit at Sambalpur through Shiva Cement, raising total installed capacity to 21.6 MTPA.

RateGain
The company announced that Sunrise Airways adopted its AirGain platform to optimize pricing, enhance revenue, and improve affordable air connectivity across the Caribbean.

Sai Life Sciences
The company, with Agility Life Sciences and Centrix Pharma, launched an Integrated CMC Partnership to accelerate end-to-end drug development for innovator biopharma companies.

Sun Pharmaceutical Industries
The company received NCLT approval for amalgamating five subsidiaries and reclassifying general reserve to retained earnings under its composite scheme of arrangement.

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