Morning Glance

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,722.8	157.4	0.64%
BSE Sensex	81,018.7	418.8	0.52%
GIFT Nifty*	24,763.5	-20.5	-0.08%
Dow Jones	44,173.64	585.06	1.34%
S&P 500	6,329.94	91.93	1.47%
NASDAQ	21,053.58	403.45	1.95%
FTSE 100	9,128.30	59.72	0.66%
CAC 40	7,632.01	85.85	1.14%
DAX	23,757.7	331.7	1.42%
Shanghai*	3,598.7	+15.42	+0.43%
Nikkei 225*	40,531.88	241.18	0.6%
Hang Seng*	24,732.0	-1.5	-0.01%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	66.1	-0.1	-0.17%
Oil (Brent)	68.7	0.0	0.03%
Gold	3,376.6	3.2	0.10%
Silver	37.4	0.0	0.05%
Copper	9,622.5	87.0	0.91%
Cotton	0.65	0.00	0.34%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.10
USD/INR	87.66	0.11	0.13
GBP/INR	116.52	1.42	1.24
EUR/INR	101.38	1.57	1.57
DXY Index	98.8	0.11	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.97	-0.01	-0.08%
S&P 500 VIXApr 24	17.52	-2.86	-14.03%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.329	-0.047
US 10-Year Yield	4.245	-0.147

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 157 points higher at 24,722 on Monday.

Adani Ports and SEZ

The company handled 40.2 MMT cargo in July 2025, up 8% YoY, driven by 22% container growth, with Mundra at 15.8 MMT and Dhamra at 3.7 MMT; total volumes for FY26 YTD reached 160.7 MMT, up 10% YoY.

AXISCADES Technologies

The company received ₹223.95 crore order from Indian Army for supply of 212 next-gen 50-ton tank transporter trailers in 2 years.

BEML

The company received a ₹282 crore order from the Ministry of Defence for supply of HMV 8x8 vehicles in regular course of business.

JSW Energy

The company acquired a 51% stake in KSK Water Infrastructures for ₹962 crore under a settlement plan to secure water supply for its 3,600 MW Chhattisgarh thermal plant.

JSW Steel

The company and JFE Steel will invest ₹5,845 crore to expand GOES capacity to 3.5 lakh tons p.a. across Karnataka and Maharashtra.

Kaynes Technology

The company's subsidiary signed a non-binding MoU with TN Govt to invest ₹4,995 crore in electronics manufacturing over six years.

Larsen & Toubro

The company secured a significant EPC order for a 116 MWac solar plant with 241 MWh BESS at Lakhisarai, Bihar.

NTPC Green Energy

The company's subsidiary NTPC REL won SECI's e-auction to supply 70,000 MT/Year Green Ammonia to Krishana Phoschem at ₹51.80/kg.

Premier Explosives

The company received a $21.75 million (₹190.07 crore) export order from an international entity for defence explosives, to be delivered in 2 years.

RattanIndia Enterprises

The company's drone arm NeoSky partnered with Karnataka Govt to deploy drones and train 500 youth in DGCA-certified drone operations.

Steel Strips Wheels

The company received nominations from two European OEMs for ~₹300 crore export orders for steel wheels, to be executed over 5 years from CY2027.

Triveni Turbine

The company launched India's first CO_2-based industrial heat pump and chillers, developed with IISc to serve domestic and international HVAC markets.

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