13 August 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,435.95	-35.75	-0.15%
BSE Sensex	77,966.35	-187.90	-0.24%
GIFT Nifty*	24,427.00	-44.00	-0.18%
Dow Jones	53,770.30	-21.58	-0.04%
S&P 500	7,748.50	20.30	0.26%
NASDAQ	26,588.50	143.04	0.54%
FTSE 100	10,833.20	-11.04	-0.10%
CAC 40	8,674.94	-40.00	-0.46%
DAX	26,331.07	-60.35	-0.23%
Shanghai*	3,966.24	19.56	0.50%
Nikkei 225*	68,609.90	1,085.86	1.61%
Hang Seng*	25,412.00	-28.18	-0.11%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	82.14	-1.13	-1.36%
Oil (Brent)	87.88	-1.10	-1.24%
Gold	4,462.60	-4.90	-0.11%
Silver	65.25	-0.45	-0.68%
Copper	14,375.30	-48.75	-0.34%
Cotton	0.82	-0.01	-1.83%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.15	0.00	-0.02%
USD/INR	95.33	-0.12	-0.13%
GBP/INR	128.82	-0.07	-0.05%
EUR/INR	109.97	-0.14	-0.13%
DXY Index	100	0.19	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.69	-0.16	-1.35%
S&P 500	14.55	-0.73	-4.78%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.78	0.000
US 10-Year Yield	4.68	-0.016

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 36 points lower at 24,436 on Wednesday.

Astral Ltd.

The company reported Q1 FY27 revenue growth of 15.9%, acquired a 60% stake in DSS, and advanced its 40,000 MT CPVC resin plant.

AVG Logistics Ltd.

The company won a 5-year contract for 30 EV trucks, estimated to generate ₹18 Cr annually.

Bajel Projects Ltd.

The company won a 765kV transmission line order worth over ₹600 Cr under the WR-ER scheme, and separately bagged an ultra-mega EPC transmission line order from PGCIL.

Finolex Cables Ltd.

The company posted Q1 FY27 net profit of ₹249 Cr on revenue of ₹2,013 Cr, both up year-on-year from ₹163 Cr and ₹1,396 Cr.

Grasim Industries Ltd.

The company reported Q1 FY27 standalone PAT of ₹246.65 Cr, invested ₹2,880 Cr in Aditya Birla Capital, and signed an SPA to acquire SPPL.

JSW Energy Ltd.

The company's JSW Neo Energy signed a shareholders' agreement with Druk Green Power for a 49% stake in the 920 MW Bhutan hydro project, with BTN 245 million initial funding.

Marksans Pharma Ltd.

The company approved Q1 FY27 results and acquired QliniQ B.V. For EUR 7.5 million and ABCnow GmbH for EUR 1.1 million.

SJVN Ltd.

The company achieved commercial operation for its 75 MW Jamui Solar Project in Bihar, built at a cost of ₹342 Cr.

Va Tech Wabag Ltd.

The company reported Q1 FY27 revenue of ₹886.8 Cr and PAT of ₹90.1 Cr, with its order book reaching ₹19,400 Cr.

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