

## Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	22,552.5	7.8	0.03%
BSE Sensex	74,332.6	-7.5	-0.01%
GIFT Nifty*	22,588.5	-39.5	-0.17%
Dow Jones	42,801.7	222.6	0.52%
S&P 500	5,770.2	31.7	0.55%
NASDAQ Comp.	18,196.2	127.0	0.7%
FTSE 100	8,679.9	-3.0	-0.03%
CAC 40	8,120.8	-76.9	-0.94%
DAX	23,009.0	-410.5	-1.75%
Shanghai*	3,362.0	-10.5	-0.31%
Nikkei 225*	37,056.1	169.0	0.46%
Hang Seng*	24,231.3	-138.4	-0.57%

\*As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	66.6	-0.4	-0.61%
Oil (Brent)	70.0	-0.5	-0.68%
Gold	2,910.3	-1.6	-0.05%
Silver	32.4	-0.2	-0.58%
Copper	9,663.2	9.2	0.09%
Cotton	0.66	0.05	7.77%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.08	0.01	0.53
USD/INR	86.87	-0.25	-0.29
GBP/INR	112.41	0.23	0.21
EUR/INR	94.37	0.29	0.31
DX Index	103.59	-0.48	-0.46

VIX	Value	Change (Pts)	Change (%)
India VIX	13.47	-0.26	-1.89%
S&P 500 VIXApr 24	23.37	-1.5	-6.03%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.688	0.000
US 10-Year Yield	4.27	-0.033

## 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 8 points higher at 22,552 on Friday.

**CAMS:**

The company's JV with KFin, MFC Technologies, received incorporation approval from MCA for MF Central operations.

**HFCL:**

The company's subsidiary HTL secured a ₹44.36 crore contract from the Indian Army to supply Tactical Optical Fiber Cable Assemblies for battlefield use.

**Inox Wind:**

The company bagged a 153 MW order from a leading renewable developer for 3 MW turbines, EPC, and O&M services in Tamil Nadu.

**J. Kumar Infraprojects:**

The company received ₹120.88 crore order from Mumbai Railway Vikas Corporation for construction work under MUTP Phase IIIA.

**Kamat Hotels:**

The company signed an agreement to manage and operate The Orchid Hotel in Rishikesh, Uttarakhand, expanding its portfolio.

**Lemon Tree Hotels:**

The company signed license agreements for Keys Lite properties in Niman and Garoth, Madhya Pradesh, managed by subsidiary Carnation Hotels, opening FY26.

**Narayana Hrudayalaya:**

The company's Cayman subsidiary HCCI executed a JV agreement with 2070 Health, W Health Ventures, and Everhope Oncology to establish cancer care centers in India.

**NIIT Learning Systems:**

The company's US subsidiary NIIT (USA) Inc. invested \$1 million in 8% Convertible Notes of StriVR Labs Inc., USA, aligning with its Corporate L&D strategy.

**Omaxe:**

The company's subsidiary Omaxe World Street launched 'New Singapore' & 'Clarkee,' a ₹600 crore retail and hospitality development at World Street, Faridabad.

**REC:**

The company revised FY25 market borrowing programme from ₹60,000 crore to ₹80,000 crore across bonds, NCDs, term loans, ECB, CP.

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