19 November 2026

Morning Glance

ARETE SECURITIES LTD.

WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,227.95	-159.45	-0.63%
BSE Sensex	82,031.81	-500.37	-0.61%
GIFT Nifty*	25,166.00	-32.50	-0.13%
Dow Jones	50,198.20	-561.25	-1.11%
S&P 500	7,323.63	-16.90	-0.23%
NASDAQ	24,429.90	101.50	0.42%
FTSE 100	10,551.20	-138.70	-1.30%
CAC 40	8,146.83	-69.95	-0.85%
DAX	25,736.24	-309.13	-1.19%
Shanghai*	3,564.21	-23.62	-0.66%
Nikkei 225*	59140.90	+116.6	0.20%
Hang Seng*	22,865.50	-429.25	-1.84%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	83.05	-0.21	-0.25%
Oil (Brent)	92.02	0.07	0.08%
Gold	3,728.30	-13.6	-0.36%
Silver	44.985	-0.074	-0.16%
Copper	12,750.00	-475.15	-3.59%
Cotton	0.75	0.00	-0.05%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.10	0.00	-0.26%
USD/INR	93.44	-0.04	-0.04%
GBP/INR	123.08	-0.28	-0.23%
EUR/INR	102.57	-0.27	-0.26%
DXY Index	103.88	0.25	0.00%

VIX	Value	Change (Pts)	Change (%)
India	15.52	0.00	0.00%
S&P 500	24.55	-0.90	-3.54%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	7.29	0.040
US 10-Year Yield	5.054	-0.012

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 159 points lower at 25,228 on Wednesday.

ACME Solar Holdings Ltd.

The company, through subsidiary ACME Alpha Renewables, signed a 150 MW hybrid PPA with NTPC at ₹3.21 per unit under the Hybrid-IV tranche, with supply commencing June 2028 and a 25-year tenure.

AXISCADES Technologies Ltd.

The company's wholly owned subsidiary Ulosia Holding AG completed the acquisition of 100% of Titan 181. VVG GmbH, a Hamburg-based German company, making it a step-down subsidiary of the company.

Biocon Ltd.

The company's pertuzumab biosimilar Pebrilzo received European Commission marketing authorization for HER2-positive breast cancer, the first biosimilar approved under EMA's tailored clinical approach, and its fifth oncology biosimilar approved in Europe and the US.

Gateway Distriparks Ltd.

The company was awarded an 8-year contract to operate and manage the DFC-compliant common rail yard terminal at JNPA, one of two among the port's five rail terminals with 1,500-metre DFC-compatible lines.

Hirect Ltd.

The company received a letter of acceptance from Chittaranjan Locomotive Works for 900 three-phase traction motors for WAG-9 electric locomotives, valued at approximately ₹136.26 Cr, with phased supplies from January to December 2027.

Indian Metals & Ferro Alloys Ltd.

The company began hot metal tapping from the second furnace of its greenfield ferro chrome expansion project in Kalinganagar, with volumes to be increased gradually after the first furnace started in August 2026.

Prestige Estates Projects Ltd.

The company, through subsidiary Prestige Falcon Realty Ventures, subscribed 50% of Advent Convention and Hotels International, a JV for a Mumbai commercial project with 1.50 million sq ft leasable area and ₹4,500 Cr GDV.

Puravankara Ltd.

The company launched Purva Cityspire in Edappally, Kochi, with estimated gross development value of ₹2,000 Cr, comprising 1,056 two and three-bedroom residences across six towers, with prices starting at ₹1.44 Cr.

SignatureGlobal (India) Ltd.

The company's wholly owned subsidiary Maa Vaishno Net-Tech emerged as successful bidder for 474.66 acres in Raigad, Mumbai Metropolitan Region, with a ₹194.19 Cr bid, and will retain 65% after partners acquire 35%.

Supreme Petrochem Ltd.

The company signed a technology agreement for a second 70 KTPA mABS line with Versalis S.p.A., with ₹450 Cr investment from internal accruals, mechanical completion by December 2028 and existing line utilization at 60%.

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