21 August 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,050.6	69.9	0.28%
BSE Sensex	81,857.8	213.5	0.26%
GIFT Nifty*	25,108.5	+28.5	+0.11%
Dow Jones	44,938.31	16.04	0.04%
S&P 500	6,395.78	-15.59	-0.24%
NASDAQ	21,172.86	-142.1	-0.67%
FTSE 100	9,288.14	98.92	1.08%
CAC 40	7,973.03	-6.05	-0.08%
DAX	24,277.0	-146.1	-0.60%
Shanghai*	3,781.9	+15.68	+0.42%
Nikkei 225*	42,711.70	-176.85	-0.41%
Hang Seng*	25,173.0	+7.06	+0.03%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	63.0	0.1	0.21%
Oil (Brent)	67.1	0.1	0.09%
Gold	3,341.1	-6.3	-0.19%
Silver	37.9	0.0	-0.11%
Copper	9,576.5	-45.0	-0.47%
Cotton	0.67	0.01	0.86%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.05
USD/INR	87.07	0.11	0.13
GBP/INR	117.56	0.01	0.00
EUR/INR	101.39	-0.17	-0.17
DXY Index	98.26	-0.03	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	11.79	-0.01	-0.08%
S&P 500 VIXApr 24	15.69	0.12	0.77%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.499	-0.019
US 10-Year Yield	4.298	-0.026

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 70 points higher at 25,050 on Wednesday.

Exide Industries
The company invested ₹100 crore in wholly owned subsidiary Exide Energy Solutions, raising total investment to ₹3,802.23 crore without altering shareholding.

Insolation Energy
The company's subsidiary Insolation Green Energy commenced commercial operations of a 3 GW PV module plant in Jaipur, raising total capacity to 4 GW.

Jupiter Wagons
The company's subsidiary Jupiter Tatravagonka Railwheel Factory received LOI worth ₹215 crores to supply 5,376 wheelsets for Vande Bharat Train.

Lupin
The company launched Bosentan Tablets for Oral Suspension 32 mg in the US with 180-day exclusivity, addressing a $10 million market.

NATCO Pharma
The company launched Bosentan tablets 32mg in the US with 180-day exclusivity via Lupin, targeting the $10 million PAH market.

NTPC
The company declared COD of 212.5 MW from Khavda-I Solar PV and 52.8 MW Wind projects, raising total installed capacity to 83,242 MW.

PG Electroplast
The company signed a partnership with PAX India to manufacture POS devices in India, marking its entry into fintech hardware.

Piramal Pharma
The company's subsidiary Piramal Healthcare Inc subscribed 1,903 OCRPS worth $190.3 million (₹1,626.49 crore) in step-down unit PPL Pharma Inc.

RailTel Corporation of India
The company received ₹34.99 crore order from Kerala IT Mission for 5-year SDC O&M projects and ₹15.42 crore order from Odisha Higher Education Department for CMS-based bilingual websites.

Thermax
The company completed acquisition of 23.03% stake in Thermax Bioenergy Solutions from Everenviro, making it a wholly owned subsidiary.

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