24 July 2026

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	23,869.60	-126.65	-0.53%
BSE Sensex	76,391.39	-363.66	-0.47%
GIFT Nifty*	23,675.00	-187.50	-0.79%
Dow Jones	51,711.60	-506.93	-0.97%
S&P 500	7,408.30	-90.66	-1.21%
NASDAQ	25,137.70	-553.21	-2.15%
FTSE 100	10,639.20	-77.80	-0.73%
CAC 40	8,299.09	-138.80	-1.64%
DAX	24,763.12	-392.29	-1.56%
Shanghai*	3,855.58	-21.20	-0.55%
Nikkei 225*	64,516.40	-1,906.17	-2.87%
Hang Seng*	24,925.47	-285.35	-1.13%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	91.88	-0.31	-0.34%
Oil (Brent)	100.46	-0.23	-0.23%
Gold	4,045.10	-5.10	-0.13%
Silver	57.95	-0.11	-0.19%
Copper	13,744.85	-148.65	-1.07%
Cotton	0.76	-0.03	-4.20%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.14	0.00	-0.34%
USD/INR	96.57	-0.01	-0.01%
GBP/INR	129.12	0.02	0.01%
EUR/INR	110.20	0.07	0.06%
DXY Index	101.39	0.26	0.00%

VIX	Value	Change (Pts)	Change (%)
India	13.48	0.18	1.35%
S&P 500	18.70	2.06	12.38%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.84	0.040
US 10-Year Yield	4.71	0.003

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 127 points lower at 23,870 on Thursday.

Intellect Design Arena
The company secured a mandate from a leading UAE bank to modernize its corporate banking platform using its eMACH.ai transaction banking suite.

KRN Heat Exchanger and Refrigeration
The company's wholly owned subsidiary, KRN HVAC Products, received a ₹50.87 crore domestic order for the supply of heat exchanger coils.

Krsnaa Diagnostics
The company signed a 7-year PPP agreement with the Himachal Pradesh Government to operate CT scan facilities across 34 government health institutions, expanding from 12 centres.

NTPC Green Energy
The company's subsidiary, NTPC Renewable Energy, commissioned 64.76 MW of the 225 MW Khavda Solar PV project in Gujarat, taking the group's operational capacity to 10,721.80 MW.

PTC Industries
The company received a design and development order from ARDE, DRDO, for the titanium cradle for the 105mm Indian Light Weight Tank, with execution over ~2.5 years.

RailTel Corporation
The company received a ₹32.75 crore LoA from North Central Railway for railway signalling works to improve track circuit reliability, with execution over ~18 months.

Sanathan Textiles
The company is set to double technical textiles yarn capacity at its Silvassa facility to 18,000 MTPA from 9,000 MTPA, with commercial production expected from August 2026.

Suzlon Energy
The company secured a 201.6 MW wind EPC order from Waaree Forever Energies, comprising 64 S144 wind turbines of 3.15 MW each, under its DevCo model in Andhra Pradesh.

Vedanta
The company created an encumbrance over ~213.98 crore shares (54.72% stake) held by promoter group entities to secure a ~₹19,350 crore financing facility, with the promoter group required to retain at least 50.1% ownership and control.

Zaggle Prepaid Ocean Services
The company invested ₹7.96 crore in Unobanc, acquiring a 19.9% equity stake through preferential allotment.

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