27 October 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,795.15	-96.25	-0.37%
BSE Sensex	84,211.88	-344.52	-0.41%
GIFT Nifty*	25,947.00	+102.5	+0.40%
Dow Jones	47,207.12	472.51	1.01%
S&P 500	6,791.69	53.25	0.79%
NASDAQ	23,204.87	263.07	1.15%
FTSE 100	9,645.62	67.05	0.7%
CAC 40	8,225.63	-0.15	0.0%
DAX	24,239.89	32.10	0.13%
Shanghai*	3,982.81	32.50	0.82%
Nikkei 225*	50,337.36	1037.71	2.1%
Hang Seng*	26,389.50	229.35	0.88%

As at 8.20 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	61.75	0.33	0.54%
Oil (Brent)	66.18	0.49	0.75%
Gold	4,073.68	-5.51	-0.14%
Silver	48.23	-0.22	-0.45%
Copper	10,807.00	10.00	0.09%
Cotton	0.65	0.01	1.14%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.16	0.00	-0.12%
USD/INR	87.75	-0.10	-0.11%
GBP/INR	116.95	-0.32	-0.28%
EUR/INR	101.88	0.03	0.03%
DXY Index	98.91	-0.03	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.59	-0.14	-1.19%
S&P 500	16.37	-0.93	-5.38%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.550	0.014
US 10-Year Yield	4.008	0.019

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 96 points below at 25,795 on Friday.

Brigade Hotel Ventures Ltd:

The company reported Q2 FY26 revenue of ₹130 crore (+20% YoY) and PAT of ₹11 crore (+58% YoY), and announced a ₹3,600 crore investment plan to add nine hotels by FY30.

eClerx Services Ltd:

The company approved a ₹3,000 million buyback of up to 666,666 shares at ₹4,500 per share through the tender offer route.

EPack Prefab Technologies Ltd:

The company received purchase orders worth ₹129.95 crore (inclusive of GST) from Avaada Ventures for design, fabrication, and supply of pre-engineered steel buildings for a glass factory in Nagpur.

Global Health Ltd:

The company received possession of 3.5 acres of land in Guwahati from AIDCL on a 60-year lease, with plans to begin phased construction soon.

Housing & Urban Development Corporation Ltd:

The company signed an MoU with Jawaharlal Nehru Port Authority to explore collaboration in infrastructure development and financing projects worth ₹5,000 crore.

Ircon International Ltd:

The company's JV with Finolex secured an ₹168.40 crore MSETCL turnkey 220kV transmission project with an 18-month execution timeline.

J K Cements Ltd:

The company commissioned a 1 MnTPA cement grinding facility at Prayagraj, increasing total grey cement capacity to 26.26 MnTPA.

NCC Ltd:

The company won a ₹6,828.94 crore contract from Central Coalfields for coal excavation and transportation over a 7-year period.

Reliance Industries Ltd:

The company formed Reliance Enterprise Intelligence Ltd, a joint venture with Meta (70:30), to develop enterprise AI services with a total investment commitment of ~₹855 crore.

Zydus Lifesciences Ltd:

The company's subsidiary, Zydus MedTech France, acquired the remaining 14.4% stake in its target entity, making it a wholly owned subsidiary.

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