29 October 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	25,936.20	-29.85	-0.11%
BSE Sensex	84,628.16	-150.69	-0.18%
GIFT Nifty*	26,168.00	+78.0	+0.30%
Dow Jones	47,706.37	161.78	0.34%
S&P 500	6,890.89	15.73	0.23%
NASDAQ	23,827.49	190.04	0.8%
FTSE 100	9,696.74	42.92	0.44%
CAC 40	8,216.58	-22.6	-0.27%
DAX	24,278.63	-30.15	-0.12%
Shanghai*	3,998.14	9.92	0.25%
Nikkei 225*	51,251.62	1032.44	2.06%
Hang Seng**	26,346.14	-87.56	-0.33%

As at 8.00 am
***** Market Holiday***

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	60.11	-0.04	-0.07%
Oil (Brent)	64.46	0.00	0.0%
Gold	3,965.55	25.43	0.65%
Silver	47.47	0.54	1.15%
Copper	10,917.00	-70.00	-0.64%
Cotton	0.65	0.00	-0.06%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.07%
USD/INR	88.25	0.00	-0.01%
GBP/INR	117.70	-0.06	-0.05%
EUR/INR	102.86	0.17	0.17%
DXY Index	98.76	-0.01	0.00%

VIX	Value	Change (Pts)	Change (%)
India	11.95	0.10	0.84%
S&P 500	16.42	0.63	3.99%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.537	-0.002
US 10-Year Yield	3.979	-0.045

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 30 points below at 25,936 on Tuesday.

Bharat Petroleum Corporation Ltd:

The company signed MoUs with OIL, NRL, and FACT for ₹1 lakh crore refinery, ₹3,500 crore pipeline, and organic fertilizer trading partnerships.

CESC Ltd:

The company's subsidiary Purvah Green Power won a SECI award for developing a 2000 MW solar project with 1000 MW/4000 MWh energy storage systems.

CreditAccess Grameen Ltd:

The company reported Q2 FY26 PAT of ₹125.8 crore (+109% QoQ), AUM of ₹25,904 crore (+3.1% YoY), and improved collection efficiency to 94.9%.

DCM Shriram Ltd:

The company reported Q2 FY26 revenue of ₹3,432 crore (+10% YoY) and PAT of ₹159 crore (+152% YoY), and declared a 180% interim dividend.

Housing & Urban Development Corporation Ltd:

The company signed MoUs with Paradip Port (₹5,100 crore) and Visakhapatnam Port (₹487 crore) for funding and infrastructure development.

Mazagon Dock Shipbuilders Ltd:

The company signed a teaming agreement with Swan Defence for the design and construction of Landing Platform Docks for the Indian Navy.

Oil India Ltd:

The company signed a ₹1 lakh crore MoU with BPCL for the Ramayapatnam refinery and a ₹3,500 crore MoU for a cross-country product pipeline with BPCL and NRL.

Premier Explosives Ltd:

The company received Ministry of Defence orders worth ₹429.56 crore for supplying chaffs and flares within 12 months.

SAMHI Ltd:

The company reported Q2 FY26 PAT of ₹998 million (+691% YoY) and announced dual-branded Westin–Fairfield and a 260-room Hyderabad hotel project.

TVS Motor Ltd:

The company posted record quarterly revenue of ₹11,905 crore (+29% YoY) and highest-ever EBITDA of ₹1,509 crore (+40% YoY).

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