12 August 2025

Morning Glance

ARETE SECURITIES LTD.
WHERE ADVISORY MEETS EXCELLENCE

Equity Research Desk

Indices	Value	Change (Pts)	Change (%)
Nifty 50	24,585.1	221.8	0.91%
BSE Sensex	80,604.1	746.3	0.93%
GIFT Nifty*	24,600.5	+25.5	+0.10%
Dow Jones	43,975.09	-200.52	-0.45%
S&P 500	6,373.45	-16	-0.25%
NASDAQ	21,385.40	-64.62	-0.3%
FTSE 100	9,129.71	33.98	0.37%
CAC 40	7,698.52	-44.48	-0.57%
DAX	24,081.3	-81.5	-0.34%
Shanghai*	3,659.7	+12.18	+0.33%
Nikkei 225*	42,808.70	988.22	2.36%
Hang Seng*	24,891.0	-15.8	-0.06%

As at 8.00 am

Commodity	Price (USD)	Change (Pts)	Change (%)
Oil (WTI)	64.0	0.0	0.06%
Oil (Brent)	66.7	0.0	-0.01%
Gold	3,352.8	7.9	0.24%
Silver	37.8	0.2	0.58%
Copper	9,643.5	16.5	0.17%
Cotton	0.65	0.00	-0.21%

Currency	Value	Change (Pts)	Change (%)
EUR/USD	1.17	0.00	0.11
USD/INR	87.60	-0.07	-0.08
GBP/INR	117.90	0.01	0.01
EUR/INR	102.06	0.01	0.01
DXY Index	98.48	0.22	0.00

VIX	Value	Change (Pts)	Change (%)
India VIX	12.22	0.18	1.50%
S&P 500 VIXApr 24	16.25	1.1	7.26%

Indicators	Value (%)	Change (Bps)
India 10-Year Yield	6.427	0.050
US 10-Year Yield	4.262	0.014

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 221 points higher at 24,585 on Monday.

Adani Enterprises
The company’s step subsidiary Horizon Aero Solutions signed an agreement to acquire 100% stake in aircraft MRO firm Indamer Technics.

Astral
The company approved acquiring 80% in Nexelon Chem and investing up to ₹120 crore to manufacture CPVC resin for cost optimisation and margin improvement.

Belrise Industries
The company approved incorporation of a wholly-owned subsidiary in India for defence, space, aerospace and allied engineering technologies business.

BEML
The company secured an order worth ₹1,888 crore from Integral Coach Factory for manufacturing, supplying, testing and commissioning complete fully functional LHB coaches.

Ceigall India
The company emerged as L1 bidder for ₹225 crore HPSIDC project to develop Bulk Drug Park infrastructure at Una, Himachal Pradesh.

Indian Hotels Company
The company will acquire 51% stakes in ANK Hotels and Pride Hospitality for up to ₹110 crore and ₹94 crore, expanding its midscale portfolio in India.

Indian Railway Finance Corporation
The company executed ₹2,539 crore refinancing for Angul Sukinda Railway to enhance financial viability and support expansion of strategic freight corridor in Odisha.

Infosys
The company implemented the nCino Platform for ABN AMRO, unifying loan origination and collateral systems, migrating 100,000+ records to enhance efficiency and compliance.

Intellect Design Arena
The company launched IntellectAI’s Purple Fabric, the world’s first open business impact AI platform, in the U.S., targeting banks and insurers.

Larsen & Toubro
The company secured an ultra-mega ₹15,000+ crore contract from Adani Power to set up 6,400MW thermal power capacity via CarbonLite Solutions.

Zydus Lifesciences
The company received USFDA final approval to market Diltiazem Hydrochloride Tablets in 30-120 mg strengths, with US sales of $13.9 million.

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