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The Morning Bulletin

LIVE - PRE - MARKET

Thursday, 3 September 2026

Last Updated 08:15 IST

MARKET OPENING SIGNAL

GIFT Nifty Futures

24,113 ▲ +129 (+0.50%)

Yesterday Close 23,914 Time: **8:15 AM IST**

GIFT Nifty is trading at around 24,083–24,095, up approximately 118–130 points (0.49–0.54%) from yesterday's close of 23,965, indicating a positive opening for the Indian market.

02 What Changed Overnight

▲ Higher

Crude Oil Extends Gains

Brent crude moved above $95 per barrel, with geopolitical tensions in the Middle East raising concerns about disruptions to global oil supplies.

SOURCE: BARRON'S

▼ Lower

Global Equities Decline

European equities remained under pressure, with the STOXX 600 falling 0.2% to 645.94, reaching around a one-month low. Germany's DAX fell 0.5%, while France's CAC 40 declined 0.3%.

SOURCE: BARRON'S

Positive

Indian markets strong resilience

Indian markets opened higher, with the Nifty 50 up around 0.23% at 23,968 and Sensex gaining 0.27% to 76,778, supported by positive global cues and strength in banking stocks. The rupee strengthened to around ₹94.30/$.

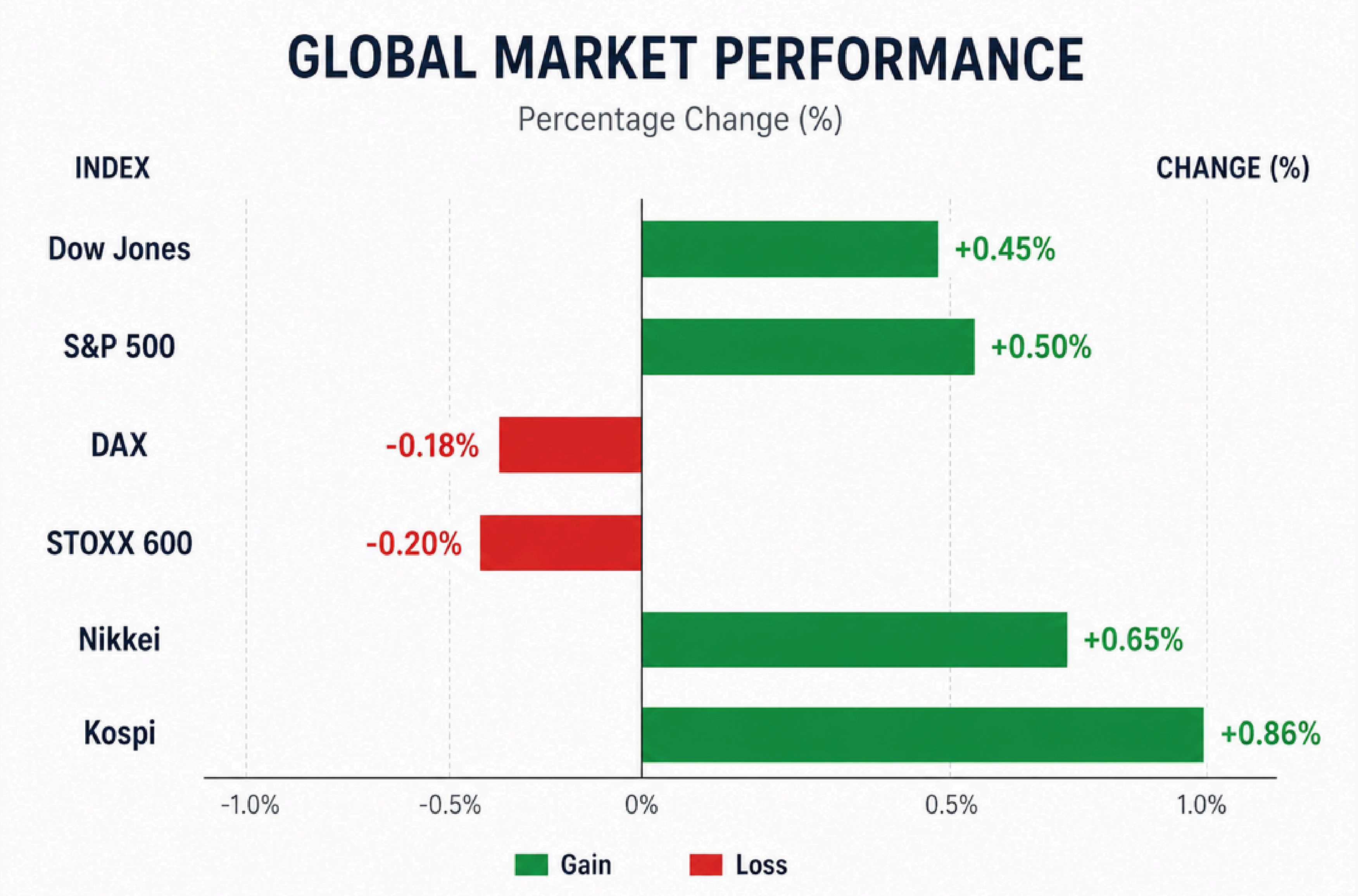
SOURCE: ET NOW

Global Markets — 3 Sept

ALL | AMERICAS | EUROPE | ASIA

INDEX	CHANGE	DIRECTION
Dow Jones	+0.45%	▲ Up
S&P 500	+0.50%	▲ Up
DAX	-0.18%	▼ Down
STOXX 600	-0.20%	▼ Down
Nikkei	+0.65%	▲ Up
Kospi	+0.86%	▲ Up

OVERNIGHT % CHANGE — BY INDEX



Global markets are showing mixed signals: Wall Street and parts of Asia are recovering, while European equities remain under pressure. Elevated crude oil prices, bond yields and geopolitical tensions continue to be key risks for emerging markets, including India.

04 Live Indian Market

SENSEX	NIFTY 50	CRUDE OIL	GOLD	USO/INR
▲ +0.14%	▲ +0.10%	▼ -$90.20/BBL	▲ +1.40%	94.47

IPO

Strong IPO Activity

Multiple IPO listings are showing strong investor appetite, with Lumino Industries debuting at a 32% premium, highlighting continued demand in India's primary market.

ENERGY & NUCLEAR

Oil Supply Risks Rise

Brent crude climbed to $95.63/barrel as intensifying Middle East tensions raised concerns over supply disruptions and increased pressure on India's import bill.

COMMODITIES

Crude Gains On Mideast Risks

Brent crude rose to $95.63/barrel as Middle East supply concerns intensified, adding to inflation and import-cost pressures.

FOREX

Rupee Strengthens

The rupee strengthened 0.52% to 94.47/USD, supported by ₹127 billion in FCNR(B) inflows, although firm Brent prices and elevated US yields remain risks.

METALS

Gold Surges On Safe-Haven Demand

Gold climbed 1.40% to $4,476.50/oz, supported by safe-haven demand amid Middle East tensions and shifting US rate expectations.

Sources: WSJ • NDTV Profit • Economic Times • Trading Economics • Sneha Vasudeo, CFP ® | SEBI Registered Research Analyst: INH000123616 | BSE No.: 5810 | DISCLAIMER

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MORNING MARKET VIEW

Mixed – Tilted Positive

Overnight cues are constructive for Indian markets: Wall Street's gains, a falling VIX and a Nikker-led Asian rebound have GIFT Nifty pointing to a firmer open, while softer crude is a tailwind for an import-dependent economy. Set against this, the rupee and Dollar Index are largely range-bound and Nomura's bearish crude call carries a wait-and-watch caveat, so today's setup reads as mixed, with the balance of overnight evidence tilted positive.

SNEHA VASUDEO
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ABOUT SNEHA VASUDEO

Sneha Vasudeo is a SEBI Registered Research Analyst with a mission to empower investors with well-researched, transparent, and actionable investment insights.
She is a qualified Certified Financial Planner (CFP®) from FPSB Ltd., USA, with hands-on experience across financial markets and investment research. Her expertise spans equity research, technical analysis, portfolio strategies, and multiple asset classes, enabling her to provide investors with a comprehensive approach to navigating the financial markets.
Sneha holds the NISM-Series-XV: Research Analyst Certification and is registered with the Securities and Exchange Board of India (SEBI) as a Research Analyst under Registration No. INH000012616.

Her core strength lies in equity research and the application of structured, research-driven investment strategies. These capabilities form the foundation of the investment insights, research reports, and trade setups developed for clients and members. Beyond being a founder and financial professional, Sneha believes in building long-term relationships through trust, transparency, disciplined research, and investor education. Her objective is to simplify the complexities of financial markets and empower investors to make informed decisions based on research rather than market noise.

LICENSES & CERTIFICATIONS

- SEBI Registered Research Analyst: INH000012616
- Certified Financial Planner (CFP®): FPSB, USA
- NISM-Series-V-A: Mutual Fund Distributor
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- Insurance Regulatory and Development Authority of India: IC-38
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