

### Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-2589.47
DII (Cash)	5313.76
FII (Index Futures)	-946.85
FII (Stock Futures)	208.19
FII (Index Options)	30117.92
FII (Stock Options)	494

- Coal India's BCCL files for IPO via OFS of up to 465.7 million shares. BCCL, a key coking coal supplier, posted FY25 net profit of ₹1,240 crore and revenue of ₹13,998 crore.
- 3B Films IPO was fully subscribed on day 2, led by retail investors; GMP is ₹3, indicating a likely 6% premium over the ₹50 issue price at listing.
- Leela Hotels (Schloss Bangalore) shares are listed at ₹406 on NSE, a 6.7% discount to the ₹435 issue price, missing grey market expectations. The IPO raised ₹3,500 crore via fresh issue and OFS.
- Upcoming IPOs in June 2025 include NSDL (pure OFS of 5.72 crore shares), Sri Lotus Developers (₹792 crore fresh issue), Indogulf Cropsciences (₹200 crore fresh issue plus OFS), Travel Food Services (₹2,000 crore OFS), and Laxmi India Finance (fresh issue and OFS).

### P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	42165.22
S&P 500	5935.94
Nasdaq	19242.61
Gift Nifty	24859.5

- Udaan raised \$114 million from existing investors M&G and Lightspeed, ahead of a planned IPO in 2026. The Bengaluru-based B2B firm, valued at \$1.8 billion, will use funds to expand and target EBITDA profitability soon.
- Pepperfry is raising ₹43.3 crore (about \$5.1 million) from existing investors like GE Pension Fund, Norwest, and Goldman Sachs. The funds will support growth and expansion. Pepperfry's post-funding valuation is estimated at ₹3,120 crore (\$367 million).
- D2C menswear brand Snitch raised \$40 million in Series B funding led by 360 ONE Asset to expand offline stores, enter quick commerce, launch new categories, and pilot international markets.
- Bengaluru-based Spense raised \$1.85 million in a pre-seed round led by GrowthCap Ventures to expand its programmable banking and card infrastructure, onboard banks, and grow fintech partnerships.

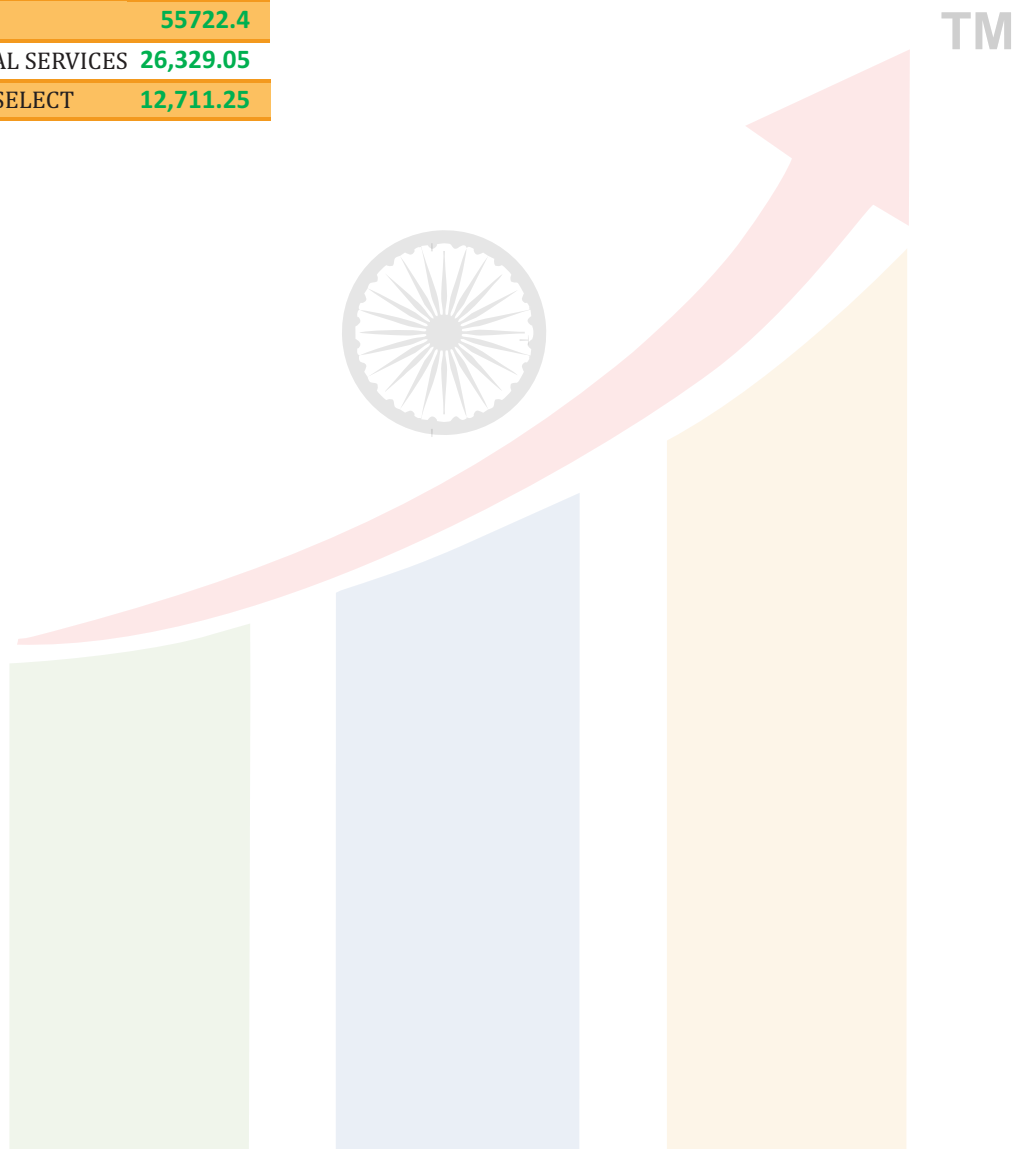
Macro Data	
Dollar Index	98.84
US 10Y Bond Yield	4.43
Brent Crude	65.22
INR/USD	85.4775
India 10Y Bond Yield	6.28
Gold	\$3362.69

### Business and Economic Updates:

- UPI hit a record high in May 2025 with 18.68 billion transactions worth ₹25.14 trillion, surpassing the ₹25 trillion mark for the first time. This marks a 33% YoY jump in volume and 23% in value.
- India aims to become a \$4 billion global MRO hub by 2030, boosting facilities, enabling 100% FDI, and advancing regulatory reforms, as PM Modi highlighted at the IATA meet.
- India's GST collections in May 2025 crossed ₹2 trillion, up 16% year on-year, reflecting strong economic activity and robust consumer sentiment. This marks the second consecutive month of GST revenues above the ₹2 trillion mark.

Indian Market	
NIFTY 50	24,598.55
NIFTY NEXT 50	66,909.60
NIFTY BANK	55722.4
NIFTY FINANCIAL SERVICES	26,329.05
NIFTY MIDCAP SELECT	12,711.25

- The rupee strengthened to 85.38 per dollar, supported by foreign in flows and a weaker US dollar. Markets await RBI's policy decision, with the rupee consolidating in the 85-86 range.global economic factors.



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