

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	1,397.02
DII (Cash)	-588.93
FII (Index Futures)	290.80
FII (Stock Futures)	919.08
FII (Index Options)	-12,051.59
FII (Stock Options)	-5428.67

- Wakefit Innovations filed IPO papers with SEBI, aiming to raise ₹468 crore via fresh issue, plus an offer for sale of 5.83 crore shares by shareholders.
- PRO FX Tech IPO opened June 26, 2025, aims to raise ₹40 crore, price band ₹82–₹87. Subscribed 1.4 times by Day 2. GMP is nil, listing July 3.
- Investors poured ₹1.8 lakh crore into recent IPOs worth ₹15,600 crore, with HDB Financial's ₹12,500 crore IPO oversubscribed 16.69 times, highlighting strong institutional demand.
- HDB Financial Services IPO was subscribed 16.69 times, led by QIBs at 55.47 times. GMP stands at ₹54–₹60, suggesting a 7–8% listing gain potential.
- Rayzon Solar filed draft papers with SEBI for a ₹1,500 crore IPO, entirely a fresh issue. Proceeds fund a 3.5 GW TOPCon cell facility, expansion and operations.

Global Market Snapshot	
Dow Jones	43,386.84 (▲ 1)
S&P 500	6,141.02 (▲ 0.52)
Nasdaq	20,167.91 (▲ 0.52)
Gift Nifty	25,781.50 (▼ -0.21)
Nikkei 225	39,584.58 (▲ 1.41)
Hang Seng	24,325.40 (▼ -0.17)

## P.E. & Funding Updates:

- Fashion tech startup Zilo raised \$4.5 million from Info Edge Ventures and Chiratae Ventures to expand its 60-minute delivery model, supply chain and metro presence.
- Flipspaces, a Mumbai-based commercial interior design startup, raised ₹50 crore from Asiana Fund. Funds will expand India, US, UAE presence, enhance technology and support strategic acquisitions.
- Jobizo, a healthtech HR platform, raised ₹12 crore in pre-Series A funding led by Inflection Point Ventures and Alkemi Ventures to boost innovation, marketing and expansion.
- Eggoz, an egg-focused consumer brand, is raising ₹125 crore in Series C led by Gaja Capital, valuing the company at nearly ₹500 crore post-money.

## Business & Economic Updates:

Macro Data		
Brent Crude	\$67.73	(▲ 7.5)
Gold	₹95,770	(▲ 0)
Silver	₹105,850	(▲ 0)
Dollar Index	97.15	(▲ 0.13)
INR/USD	85.71	(▼ -0.27)
India 10Y Bond Yield	6.37	(▼ -0.11)
US 10Y Bond Yield	4.24	(▲ 1.09)

- India recorded a \$13.5 billion current account surplus (1.3% of GDP) in the March 2025 quarter, mainly due to strong services exports and higher remittances.
- The Reserve Bank of India drained ₹84,975 crore from the banking system via a seven-day VRRR auction at a 5.49% cut-off rate to manage liquidity.
- Vi Business study shows 76% of MSMEs plan to boost cybersecurity spending, 72% to invest in cloud. Digital Maturity Index rises to 58.0 in 2025.
- The rupee gained 1.3% this week, closing at 85.4750 per US dollar—its best weekly performance in over two years, aided by weaker dollar.
- India's external debt rose to \$736.3 billion (19.1% of GDP) by March 2025, up 10% from last year, with US dollar-denominated debt at 54.2% share.
- SEBI introduced new disclosure standards for related party transactions, requiring detailed information for audit committee and shareholder approval. These norms take effect September 1, 2025.
- Jio BlackRock, a 50:50 joint venture between Jio Financial and BlackRock, received SEBI approval to launch broking services, completing its suite of investment offerings.

Indian Market		
BSE Sensex	83,755.87	(▲ 1.21)
NIFTY 50	25,549.00	(▲ 1.21)
BSE SENSEX 50	26,675.86	(▲ 1.20)
NIFTY NEXT 50	68,295.15	(▲ 0.92)
BSE SENSEX Next 50	84,814.53	(▲ 0.88)
NIFTY BANK	57,206.70	(▲ 1.04)
BSE BANKEX	64,305.68	(▲ 0.95)
NIFTY FINANCIAL SERVICES	27,248.40	(▲ 1.48)
BSE FINANCIAL SERVICES	12,887.80	(▲ 1.25)
NIFTY MIDCAP SELECT	13,305.10	(▲ 0.63)
BSE MIDCAP	46,362.77	(▲ 0.56)
INDIA VIX	12.39	(▼ -1.61)

## Geopolitical Updates:

- US tariffs and the current geopolitical climate boost Indian MSMEs' exports. To sustain gains, MSMEs must invest in R&D and focus on complete product manufacturing.
- Rajnath Singh and Russia's defence minister discussed terrorism, the Pahalgam attack and defence cooperation, agreeing on faster S-400 deliveries and upgrades to Indian military hardware.

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