

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-831.50
DII (Cash)	3,497.44
FII (Index Futures)	-902.85
FII (Stock Futures)	-3491.35
FII (Index Options)	-10,904.39
FII (Stock Options)	194.27

- Seven new IPOs and 19 listings are lined up next week, including Crizac and Travel Food Services, promising another action-packed week for investors.
- Tenneco Clean Air India filed for a ₹3,000 crore IPO, entirely an offer for sale by its promoter. The company will not receive any proceeds.
- German Green Steel and Power has filed for a ₹450 crore IPO, comprising a fresh issue and a promoter offer-for-sale. Funds will support the expansion of Gujarat and renewable energy projects.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	44,094.77 (▲ 1.63)
S&P 500	6,173.07 (▲ 0.52)
Nasdaq	20,273.46 (▲ 0.52)
Gift Nifty	25,601.00 (▼ -0.70)
Nikkei 225	40,487.39 (▲ 2.28)
Hang Seng	24,072.28 (▼ -1.04)

- AppsForBharat raised ₹175 crore (\$20 million) in Series C funding to expand Sri Mandir, strengthen temple partnerships, logistics, and AI features across 20 temple towns.
- Vivriti Capital, backed by TVS Capital, plans to raise ₹9,000 crore in FY26 for debt refinancing and growth, targeting 30-35% disbursement growth amid improving rate transmission.
- Private equity and venture capital investments in India fell 11.3% year-on-year in H1 2025 to \$14.8 billion, with 517 deals recorded.
- Jumbotail raised \$120 million led by SC Ventures, becoming India's fifth unicorn of 2025 at a \$1 billion valuation, following its acquisition of Solv India.
- LogicFlo AI, a Boston-based startup, raised \$2.7 million to expand its AI agent platform for life sciences, accelerating global growth and transforming regulated scientific workflows.
- Infra.Market secured an extra \$50 million from Mars Growth Capital, raising its debt facility to \$150 million as it prepares for a potential IPO.

## Business & Economic Updates:

Macro Data		
Brent Crude	\$66.74	(▼ -0.09)
Gold	₹96,390.00	(▲ 0.63)
Silver	₹106,360.00	(▼ -0.09)
Dollar Index	96.71	(▼ -0.71)
INR/USD	85.75	(▲ 0.30)
India 10Y Bond Yield	6.36	(▲ 0.00)
US 10Y Bond Yield	4.23	(▼ -1.40)

- India's fiscal deficit for April-May 2025 narrowed sharply to ₹13,163 crore, just 0.8% of the annual target, driven by strong non-tax revenue growth.
- India's industrial production growth slowed to 1.2% in May 2025, the lowest in nine months, as manufacturing momentum weakened and mining and electricity contracted.
- The RBI's latest stress test projects bank bad loans rising to 2.5% by March 2027 from 2.3% in March 2025, but capital buffers remain strong, ensuring sector stability even under adverse scenarios.
- India's gross tax receipts grew 12% in April-May 2025, driven by a 22% surge in GST collections, despite income tax reliefs announced in Budget FY26.
- India-US interim trade deal talks have entered the final phase, with a possible announcement before July 8 to avoid 26% reciprocal tariffs on Indian exports.
- Sona Comstar will start producing rare earth magnets in India for EVs, aiming to cut reliance on China, following government incentives for local manufacturing.
- RBI reports NPA reduction in the last five years was mainly due to write-offs, with private banks leading, despite overall asset quality improvement to record lows.

Indian Market		
BSE Sensex	83,606.46	(▼ -0.18)
NIFTY 50	25,517.05	(▼ -0.13)
BSE SENSEX 50	26,653.70	(▼ -0.08)
NIFTY NEXT 50	68,998.20	(▲ 1.03)
BSE SENSEX Next 50	85,687.34	(▲ 1.03)
NIFTY BANK	57,312.75	(▲ 0.19)
BSE BANKEX	64,177.72	(▼ -0.20)
NIFTY FINANCIAL SERVICES	27,174.45	(▼ -0.27)
BSE FINANCIAL SERVICES	12,910.11	(▲ 0.17)
NIFTY MIDCAP SELECT	13,433.85	(▲ 0.97)
BSE MIDCAP	46,854.46	(▲ 1.06)
INDIA VIX	12.78	(▲ 3.15)

## Geopolitical Updates:

- Geopolitical tensions briefly pushed oil above \$80/barrel, but with rising supply and weak demand, Brent's 2025 average is projected around \$67–68 per barrel.
- RBI projects India's FY26 GDP growth at 6.5%, but warns geopolitical and trade risks could weigh on growth despite strong fundamentals and resilient financial system.

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