

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,970.14
DII (Cash)	771.08
FII (Index Futures)	-115.67
FII (Stock Futures)	-1334.94
FII (Index Options)	27,647.39
FII (Stock Options)	-1511.7

- Flipkart-backed Shadowfax has confidentially filed a draft red herring prospectus with Sebi for a ₹2,000-2,500 crore IPO, half via primary issue.
- Hero Motors refiled IPO papers with SEBI, raising issue size to ₹1,200 crore with ₹800 crore fresh issue, ₹400 crore OFS to reduce debt and expand manufacturing.
- Smarten Power Systems IPO opens July 7–9, 2025; size ₹50 crore at ₹100/share. Company makes power backup, solar products; 66.5% revenue domestic, 33.5% exports.
- Suntech Infra and Rama Telecom debuted strong on NSE SME, listing at 27% and 6% premiums; Supertech EV listed 20% below IPO price on BSE SME.
- Kissht plans a ₹1,926 crore IPO by June 2025, targeting a valuation of \$900 million to \$1.1 billion, to fund growth and expand its secured and unsecured lending businesses.

Global Market Snapshot	
Dow Jones	44,494.94 (▲ 0.91)
S&P 500	6,204.95 (▲ 0.52)
Nasdaq	20,369.73 (▲ 0.47)
Gift Nifty	25,656.50 (▲ 0.22)
Nikkei 225	39,986.33 (▲ 1.24)
Hang Seng	24,072.28 (▲ 0.00)

P.E. & Funding Updates:

- Zango raised \$4.8 million led by Nexus Venture Partners to expand AI-native compliance tools, grow teams in London and Bengaluru and serve more financial sectors.
- Bambrew, Bengaluru-based sustainable packaging startup, raised ₹90 crore led by Ashok Goel and ENRISSION INDIA CAPITAL to scale manufacturing, innovate and expand globally, including D2C launch.
- Lamark Biotech raised ₹6.5 crore pre-Series A funding led by IAN Group to accelerate thermostable insulin development and expand its temperature-resilient biologics platform globally.
- Eeki raised \$7 million from Sixth Sense Ventures to expand climate-resilient, aeroponic farming nationwide, strengthen R&D and deploy Gen 3 growing chambers for sustainable agriculture.

Macro Data

Brent Crude	\$67.11	(▲ 0.55)
Gold	₹97,580.00	(▲ 1.23)
Silver	₹106,730.00	(▲ 0.35)
Dollar Index	96.68	(▼ -0.03)
INR/USD	85.53	(▼ -0.26)
India 10Y Bond Yield	6.39	(▲ 0.47)
US 10Y Bond Yield	4.24	(▲ 0.24)

Indian Market

BSE Sensex	83,697.29	(▲ 0.11)
NIFTY 50	25,541.80	(▲ 0.10)
BSE SENSEX 50	26,686.14	(▲ 0.12)
NIFTY NEXT 50	68,930.20	(▼ -0.10)
BSE SENSEX Next 50	85,541.51	(▼ -0.17)
NIFTY BANK	57,459.45	(▲ 0)
BSE BANKEX	64,134.38	(▲ 0)
NIFTY FINANCIAL SERVICES	27,124.20	(▼ -0.18)
BSE FINANCIAL SERVICES	12,911.07	(▲ 0.01)
NIFTY MIDCAP SELECT	13,416.15	(▼ -0.13)
BSE MIDCAP	46,820.97	(▼ -0.07)
INDIA VIX	12.53	(▼ -1.96)

- Garaaz, an automotive spare parts aggregator, raised ₹4.55 crore in seed funding led by GVFL to expand operations, strengthen tech and digitize India's fragmented aftermarket sector.

Business & Economic Updates:

- GST revenue growth slowed in June 2025: gross collections rose 6.2% to ₹1.85 lakh crore, but net collections increased only 3.3% due to higher refunds.
- US and India are close to finalizing a trade deal before July 9, focusing on reduced tariffs but deadlocked over India's refusal to open its dairy sector.
- India's manufacturing PMI rose to 58.4 in June 2025, a 14-month high, driven by strong output, new orders, job creation and robust export demand.
- The Cabinet approved a ₹1 lakh crore RDI scheme to provide long-term, low-interest funding, boosting private sector innovation in strategic and sunrise technology sectors.

Geopolitical Updates:

- On July 1, 2025, the US lifted most sanctions on Syria, enabling investment and reconstruction while maintaining restrictions on Assad allies and terrorists.
- US President Donald Trump announced Israel agreed to conditions for a 60-day Gaza ceasefire; final proposal awaits Hamas approval, with Qatar and Egypt mediating.
- On July 1, 2025, Israel intercepted a missile launched by Yemen's Houthi forces; no injuries reported. Israel vowed strong retaliation, equating Yemen with Tehran.
- G7 foreign ministers reaffirmed support for Israel, opposed Iran's nuclear ambitions, urged renewed talks and condemned threats against IAEA, promoting regional stability and ceasefire.

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