

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,481.19
DII (Cash)	1,333.06
FII (Index Futures)	-2,443.59
FII (Stock Futures)	-177.66
FII (Index Options)	65,491.20
FII (Stock Options)	-384.17

- Lenskart founder Peyush Bansal is buying back 1.5-2% stake for \$150 million from investors like SoftBank, ahead of a planned IPO at \$7 billion valuation.
- NSE's unlisted shares surged 60% in two weeks to ₹2,400 amid IPO buzz, with over one lakh retail shareholders driving record grey market demand and frenzy.
- Meesho has confidentially filed for a ₹4,250 crore IPO with SEBI, targeting a September–October 2025 market debut, combining fresh issue and offer-for-sale.
- Asston Pharmaceuticals IPO opens 9–11 July 2025, price band ₹115–123/share, SME BSE listing, aims to raise ₹25.77–27.56 crore via fresh issue.
- At least 12 Indian startups, including Meesho and PhysicsWallah, plan IPOs in 2025, targeting over ₹18,000 crore in fresh issues amid rising public market confidence.

Global Market Snapshot	
Dow Jones	44,828.53 (▲ 0.77)
S&P 500	6,227.42 (▲ 0.47)
Nasdaq	20,393.13 (▲ 0.94)
Gift Nifty	25,495.00 (▼ -0.14)
Nikkei 225	39,785.90 (▲ 0.06)
Hang Seng	24,069.94 (▼ -0.63)

## P.E. & Funding Updates:

- iD Fresh Food plans to raise ₹500 crore via secondary share sale, offering exit to early investors like Premji Invest, ahead of its planned FY27 IPO.
- GobbleCube raised \$3.5 million led by InfoEdge Ventures to expand its AI tools for consumer brands, reaching \$2 million ARR and 200+ clients globally.
- Luma Fertility raised \$4 million seed funding led by Peak XV's Surge to expand tech-enabled fertility clinics in Mumbai and other cities over two years.

Macro Data		
Brent Crude	\$68.64	(▼ -0.68)
Gold	₹97,080.00	(▼ -0.65)
Silver	₹108,270.00	(▲ 0.62)
Dollar Index	97.02	(▲ 0.25)
INR/USD	85.32	(▼ -0.46)
India 10Y Bond Yield	6.35	(▼ -0.16)
US 10Y Bond Yield	4.35	(▲ 1.64)

Indian Market		
BSE Sensex	83,239.47	(▼ -0.20)
NIFTY 50	25,405.30	(▼ -0.19)
BSE SENSEX 50	26,535.50	(▼ -0.22)
NIFTY NEXT 50	68,355.85	(▼ -0.54)
BSE SENSEX Next 50	85,016.53	(▼ -0.36)
NIFTY BANK	56,791.95	(▼ -0.36)
BSE BANKEX	63,384.67	(▼ -0.48)
NIFTY FINANCIAL SERVICES	26,734.90	(▼ -0.47)
BSE FINANCIAL SERVICES	12,741.86	(▼ -0.39)
NIFTY MIDCAP SELECT	13,462.55	(▲ 0.16)
BSE MIDCAP	46,708.33	(▼ -0.06)
INDIA VIX	12.38	(▼ -0.48)

- FitFeast, a Shark Tank India-featured protein snack brand, raised ₹5.5 crore seed funding led by IPV, with Axar Patel and Shane Watson as investors and ambassadors.
- Tenacity Ventures, backed by Dream11 founders, plans a \$150 million second fund as multiple portfolio startups approach IPO, focusing on B2B SaaS investments.
- Maieutic Semiconductor raised \$4.15M seed funding to develop GenAI-driven platform revolutionizing analog chip design, speeding cycles and automation.
- FES Cafe raised ₹3 crore seed funding to expand dessert-led, eggless café chain across Delhi, Gurgaon, Jaipur, targeting 100+ stores.

## Business & Economic Updates:

- Gujarat has become India's third state to surpass 1 crore registered stock market investors, joining Maharashtra and Uttar Pradesh; these three account for 36% of India's investor base.
- Reliance Industries will consolidate all FMCG brands into New RCPL, a direct subsidiary, to attract new investors and prepare for a potential IPO.
- DSP Mutual Fund has launched India's first retail offshore fund from GIFT City in July 2025, aiming to broaden retail investor access to global markets.
- India aims for a \$1 trillion chemical sector by 2040, targeting 12% global value chain share, driven by reforms, innovation and world-class chemical hubs.

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- BlackRock has gone overweight on Indian equities, citing India's strong demographics, credible fiscal management, political stability and long-term growth potential amid global macroeconomic shifts.
- Adani Group leads the race to acquire Jaiprakash Associates with a ₹12,500 crore bid, offering over ₹8,000 crore upfront; Dalmia may top if legal hurdles clear.
- SEBI proposes an e-book platform for NPO fundraising on Social Stock Exchange, streamlining bidding, ensuring transparency and boosting investor confidence. Foreign investors are excluded.
- Karan Bhagat, founder of 360 ONE, transformed it into a top Indian wealth manager with \$68 billion AUM, now nearing a major UBS partnership deal.

## Geopolitical Updates:

- Tensions escalated in the South China Sea in April 2025 as China and the Philippines clashed over Sandy Cay, with both nations asserting sovereignty through flag displays and accusations of provocation.
- Donald Trump's 2025 Middle East trip prioritized massive investment deals, a pragmatic, non-interventionist U.S. approach, easing Syria sanctions and cautious engagement with Iran.

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