

FII/DII Activity (in ₹crores)

FII (Cash)	-760.11
DII (Cash)	-1,028.84
FII (Index Futures)	-747.45
FII (Stock Futures)	-421.67
FII (Index Options)	-1,381.17
FII (Stock Options)	-154.93

Global Market Snapshot

Dow Jones	44,484.42	(▼ -0.77)
S&P 500	6,227.42	(▲ 0.00)
Nasdaq	20,393.13	(▲ 0.00)
Gift Nifty	25,527.00	(▲ 0.13)
Nikkei 225	39,785.90	(▲ 0.00)
Hang Seng	24,069.94	(▲ 0.00)

Recent IPO Updates:

- Fractal Analytics will file draft papers by mid-August for a \$500 million IPO, targeting a valuation above \$3 billion, offering partial exits to Apax, TPG.
- Crizac IPO was subscribed nearly 63 times on the final day, driven by strong QIB and NII demand. Price band: ₹233–245. Listing is set for July 9.
- Next week, five IPOs open including Travel Food Services and four SME issues while nine companies, including Crizac and eight SMEs, will be listed on exchanges.
- Anthem Biosciences' IPO opens on July 14, 2025 and closes on July 16, 2025. Issue size: ₹3,395 crore. Listing on BSE and NSE. Allotment on July 17.

P.E. & Funding Updates:

- Brigade Hotel Ventures raised ₹126 crore from 360 ONE, selling 1.4 crore shares at ₹90 each for a 4.74% stake, ahead of its ₹900 crore IPO.
- InCred Finance raised ₹400 crore in debt funding: ₹300 crore from Morgan Stanley, ₹50 crore from Nippon Life India and ₹50 crore from InCred Capital and InCred Wealth.

Macro Data

Brent Crude	\$68.64	(▲ 0.00)
Gold	₹97,300.00	(▲ 0.23)
Silver	₹108,510.00	(▲ 0.22)
Dollar Index	97.18	(▲ 0.16)
INR/USD	85.32	(▲ 0.00)
India 10Y Bond Yield	6.35	(▲ 0.00)
US 10Y Bond Yield	4.35	(▲ 0.00)

Indian Market

BSE Sensex	83,432.89	(▲ 0.23)
NIFTY 50	25,461.00	(▲ 0.22)
BSE SENSEX 50	26,591.46	(▲ 0.21)
NIFTY NEXT 50	68,607.80	(▲ 0.37)
BSE SENSEX Next 50	85,251.58	(▲ 0.28)
NIFTY BANK	57,031.90	(▲ 0.42)
BSE BANKEX	63,661.83	(▲ 0.44)
NIFTY FINANCIAL SERVICES	26,866.30	(▲ 0.49)
BSE FINANCIAL SERVICES	12,780.12	(▲ 0.30)
NIFTY MIDCAP SELECT	13,416.00	(▼ -0.35)
BSE MIDCAP	46,814.34	(▲ 0.23)
INDIA VIX	12.32	(▼ -0.48)

- Delhi-based all-electric taxi startup Evera Cabs raised \$4 million from Mufin Green Finance via convertible debentures and debt to expand its EV fleet and airport-focused services.

Business & Economic Updates:

- SEBI barred Jane Street and seized ₹4,844 crore for alleged Bank Nifty manipulation, citing a “well-planned, sinister scheme.” Jane Street disputes the findings.
- India’s foreign exchange reserves rose by \$4.8 billion to \$702.78 billion for the week ended June 27, nearing an all-time high of \$704.89 billion.
- India’s fintech funding fell to \$889 million in H1 2025, marking a five-year low, with Bengaluru leading the way and only one new unicorn, Juspay, emerging.
- India’s banking liquidity surplus crossed ₹4 trillion in July 2025, driven by government spending. RBI absorbed ₹1 trillion via the VRRR auction to manage overnight rates.
- India will launch a ₹1,998 crore, three-year incentive scheme to boost domestic drone manufacturing for civil and military use, targeting 40% local components by 2028.

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