

FII/DII Activity (in ₹crores)	
FII (Cash)	321.16
DII (Cash)	1,853.39
FII (Index Futures)	-668.04
FII (Stock Futures)	-193.24
FII (Index Options)	-3,784.47
FII (Stock Options)	7.27

Global Market Snapshot	
Dow Jones	44,406.36 (▼ -0.18)
S&P 500	6,279.35 (▲ 0.83)
Nasdaq	20,601.10 (▲ 1.02)
Gift Nifty	25,516.00 (▼ -0.04)
Nikkei 225	39,587.68 (▼ -0.50)
Hang Seng	23,887.83 (▼ -0.76)

Recent IPO Updates:

- A surge of IPOs, new players and expansion by Indian and global hotel brands is ushering in a new, ambitious era for India's hospitality industry.
- Travel Food Services IPO was subscribed 10% on day one, with retail leading at 14%. GMP dropped to ₹16; IPO closes July 9.
- July's IPO boom features major launches: NSDL, LG Electronics India, JSW Cement, Hero FinCorp, BlueStone, Greaves Electric Mobility and GK Energy, spanning diverse sectors.
- Square Yards plans a ₹2,000 crore IPO at a \$1.5–2 billion valuation, with proceeds split between growth funding and early investor exits; DRHP filing expected Fy26.

P.E. & Funding Updates:

- Tech-enabled NBFC InPrime Finserv raised ₹50 crore in Series A1 funding led by Pravega Ventures, aiming to expand into underserved markets and empower India's emerging middle class.
- Spiritual lifestyle brand Divine Hindu raised ₹1.56 crore in seed funding to expand certified devotional products, launch new categories and grow in India and abroad.
- Jewellery brand AMAMA raised \$1 million from Mistry Ventures to expand in India, strengthen supply chain and tech and open four new stores.

Macro Data

Brent Crude	\$69.54	(▲ 1.31)
Gold	₹97,580.00	(▲ 0.29)
Silver	₹108,340.00	(▼ -0.16)
Dollar Index	97.35	(▲ 0.17)
INR/USD	85.87	(▲ 0.64)
India 10Y Bond Yield	6.35	(▲ 0.00)
US 10Y Bond Yield	4.39	(▲ 0.92)

- Mumbai-based clean-label food startup Khetika raised over ₹150 crore (\$18 million) in Series B funding to expand product lines, upgrade manufacturing and enhance supply chain tech.
- WiseLife, featured on Shark Tank India, raised ₹8 crore in pre-Series A funding from Rukam Capital to expand eco-friendly yoga mats, launch new products and boost distribution.

Business & Economic Updates:

- Jio BlackRock's debut fund offer raised over ₹17,800 crore, attracting 90+ institutions and 67,000 retail investors, marking a strong entry into India's market.
- Retail F&O traders in India lost ₹1.06 lakh crore in FY25, a 41% rise from last year, with 91% of traders incurring losses.
- Top VCs like Peak XV, Stellaris, Accel and Elevation are backing AI-first startups to disrupt Indian IT services, aiming for leaner, tech-driven operations.
- India targets a \$300 billion bioeconomy by 2030, driven by the BioE3 Policy, bio-AI hubs and nearly 11,000 biotech startups powering sustainable growth.
- China's rare earth magnet export restrictions have triggered a rethink of India's EV policy, prompting discussions on diversifying technology and reducing dependency on Chinese supply.

Indian Market

BSE Sensex	83,442.50	(▲ 0.01)
NIFTY 50	25,461.30	(▲ 0.00)
BSE SENSEX 50	26,592.94	(▲ 0.01)
NIFTY NEXT 50	68,725.80	(▲ 0.17)
BSE SENSEX Next 50	85,306.17	(▲ 0.06)
NIFTY BANK	56,949.20	(▼ -0.15)
BSE BANKEX	63,575.99	(▼ -0.13)
NIFTY FINANCIAL SERVICES	26,833.45	(▼ -0.12)
BSE FINANCIAL SERVICES	12,760.94	(▼ -0.15)
NIFTY MIDCAP SELECT	13,398.25	(▼ -0.13)
BSE MIDCAP	46,743.36	(▼ -0.15)
INDIA VIX	12.56	(▲ 1.95)

- SEBI proposes easing norms for AMCs, allowing management of non-broad-based pooled funds and expansion into new activities, with strong governance and regulatory safeguards.
- The government received ₹7,500–8,000 crore in investment proposals from around 100 firms under the Electronics Components Manufacturing Scheme, aiming to boost domestic production.
- Capgemini will acquire WNS for \$3.3 billion to strengthen its AI-powered business process services, paying \$76.50 per share, a 28% premium over the 90-day average.
- The rupee fell sharply to 85.86 per dollar after Trump's 10% tariff threat on BRICS-aligned nations; RBI intervened to stabilize volatility.

Geopolitical Updates:

- Donald Trump warned BRICS nations of an extra 10% tariff if they support "anti-American policies," intensifying trade tensions and global economic uncertainty. India has not responded.
- No formal treaty barred NATO's eastward expansion. Early 1990 assurances were verbal, not binding; NATO's "open door" policy allowed later Eastern European enlargement.

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