

Recent IPO Updates:

| FII/DII Activity (in ₹crores) | |
|-------------------------------|-----------|
| FII (Cash) | 77.00 |
| DII (Cash) | 920.83 |
| FII (Index Futures) | 991.43 |
| FII (Stock Futures) | -558.28 |
| FII (Index Options) | -3,286.51 |
| FII (Stock Options) | 1497.81 |

- Reliance Jio has delayed its highly anticipated IPO beyond 2025, aiming for higher revenue and a larger subscriber base before listing, according to sources.
- Smartworks Coworking IPO opens July 10 with a price band of Rs 387–407 per share, aiming to raise up to Rs 583 crore; listing on July 17.
- SEBI cleared WeWork India's IPO proposal, allowing a pure offer-for-sale of 4.37 crore shares, potentially raising Rs 4,000 crore, with listing expected by September 2025.
- Crizac shares listed July 9 on BSE and NSE, with a 15% grey market premium signaling a strong debut above the Rs 245 issue price band.

P.E. & Funding Updates:

| Global Market Snapshot | |
|------------------------|---------------------|
| Dow Jones | 44,458.30 (▲ 0.49) |
| S&P 500 | 6,225.52 (▼ -0.07) |
| Nasdaq | 20,418.46 (▲ 0.03) |
| Gift Nifty | 25,530.00 (▼ -0.29) |
| Nikkei 225 | 39,821.28 (▲ 0.33) |
| Hang Seng | 23,892.32 (▼ -1.06) |

- Green Aero, an IIT Delhi-incubated startup, raised \$1.6 million to develop advanced hydrogen-based propulsion systems for defence and civil aviation, targeting zero-emission engines.
- Ahmedabad-based drone startup Enercomp raised Rs 2 crore in a bridge round led by angel investors to expand manufacturing, scale AI drone software, and boost national deployments.
- Chai Bisket raised \$5 million to launch Chai Shots, a mobile-only OTT platform offering two-minute microdramas for Gen Z and regional language audiences.
- Bengaluru-based NBFC Varthana raised Rs 159 crore in debt funding from BlueEarth Capital, responsAbility, and Franklin Templeton AIF to expand affordable education and green infrastructure.
- NRI-focused fintech Belong raised Rs 43 crore in a seed round led by Elevation Capital to expand USD fixed deposits and financial products for NRIs.
- Zepto is set to raise \$500 million at a \$7 billion valuation in a round led by General Catalyst and Avenir, ahead of its planned IPO.

Business & Economic Updates:

| Macro Data | |
|----------------------|--------------------|
| Brent Crude | \$70.19 (▲ 0.23) |
| Gold | ₹96,920 (▲ 0.13) |
| Silver | ₹107,700 (▼ -0.39) |
| Dollar Index | 97.29 (▼ -0.30) |
| INR/USD | 85.68 (▼ -0.03) |
| India 10Y Bond Yield | 6.3 (▼ -0.79) |
| US 10Y Bond Yield | 4.34 (▼ -1.59) |

| Indian Market | |
|--------------------------|---------------------|
| BSE Sensex | 83,536.08 (▼ -0.21) |
| NIFTY 50 | 25,476.10 (▼ -0.18) |
| BSE SENSEX 50 | 26,610.18 (▼ -0.19) |
| NIFTY NEXT 50 | 68,678.15 (▼ -0.06) |
| BSE SENSEX Next 50 | 85,108.45 (▼ -0.33) |
| NIFTY BANK | 57,213.55 (▼ -0.07) |
| BSE BANKEX | 63,969.15 (▼ -0.11) |
| NIFTY FINANCIAL SERVICES | 27,058.45 (▲ 0.15) |
| BSE FINANCIAL SERVICES | 12,832.82 (▼ -1.91) |
| NIFTY MIDCAP SELECT | 13,291.85 (▼ -0.31) |
| BSE MIDCAP | 46,723.58 (▼ -0.05) |
| INDIA VIX | 12.07 (▼ -1.07) |

- Groww maintained its lead over Zerodha and Angel One in June with a 26.27% market share, despite a decline in India's overall active user base.
- Donald Trump's 50% tariff on copper imports, effective August 1, is expected to have minimal impact on India due to its limited copper exports to the US.
- Company registrations in India rose 8.3% in June 2025, with LLP registrations jumping 18.4%, reflecting strong investor confidence and economic growth prospects.
- With China halting specialty fertiliser exports, Indian companies now import from Europe, Russia and West Asia at 15–20% higher prices, risking higher crop input costs.
- NIIF will close \$700 million of its \$1 billion Private Markets Fund II soon, backed by NDB, AIIB and government, targeting infrastructure and technology sectors.
- From July 16, all central government payments above ₹75 crore must be processed via RBI's e-Kuber system, enhancing transparency and speeding up fund reconciliation.
- From July 14, 2025, MCA mandates a revised e-form CSR-1 for registering CSR entities, including universities and hospitals, tightening compliance and requiring detailed disclosures.

Geopolitical Updates:

- US President Donald Trump announced tariffs up to 30% on imports from Libya, Iraq, Algeria and Sri Lanka, effective August 1, with lower rates for others
- BRICS promotes local currency trade and payment systems to reduce US dollar dependence, aiming for alternatives but not full replacement, challenging dollar dominance gradually.

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