

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	221.06
DII (Cash)	591.33
FII (Index Futures)	-1,833.94
FII (Stock Futures)	-3850.96
FII (Index Options)	6,765.62
FII (Stock Options)	3041.07

- Manipal Hospitals' valuation has surged to \$13 billion after acquiring Sahyadri Hospitals for over ₹6,000 crore; the group plans an IPO in 2026.
- Aggcon Equipments International filed for a ₹332 crore IPO, including a 94 lakh share offer-for-sale; proceeds will repay debt, buy equipment and be used for corporate purposes.
- Smartworks Coworking Spaces IPO is 50% subscribed on day two, with strong NII and retail interest. GMP stands at ₹30 (7% premium). Listing is on July 17.
- Glen Industries' IPO was subscribed a massive 260.28 times on the final day, led by strong NII and retail demand. Allotment is on July 11; listing is on July 15.
- Merchant bankers are actively pitching to NSE's top management for its IPO mandate, anticipating SEBI's No Objection Certificate and a potential listing by Q4 Fy26.

Global Market Snapshot		
Dow Jones	44,650.64	(▲ 0.43)
S&P 500	6,263.26	(▲ 0.61)
Nasdaq	20,611.34	(▲ 0.94)
Gift Nifty	25,404.00	(▼ -0.49)
Nikkei 225	39,646.36	(▼ -0.44)
Hang Seng	24,028.37	(▲ 0.40)

## P.E. & Funding Updates:

- Sai Parenterals secured a \$5.82 million (₹50 crore) equity investment led by Samarsh Capital, Vyom Partners and Blue Lotus Capital to support international expansion plans.
- IIFL Home Finance secured a \$100 million, five-year loan from AIIB at 8.58% to fund affordable housing for low-income families and promote green building practices in India.
- Arteria Technologies raised ₹100 crore in Series B funding from ICICI Venture to expand into new markets, grow its team and accelerate AI-driven product innovation.
- Clean Fanatics raised ₹17 crore (\$2 million) in seed funding led by Inflection Point Ventures to expand its team, enhance technology and launch new service verticals.

## Business & Economic Updates:

- Priya Nair has been appointed as the first woman CEO and MD of Hindustan Unilever Ltd, effective August 1, 2025, succeeding Rohit Jawa.

Macro Data	
Brent Crude	\$68.64 (▼ -2.21)
Gold	₹97,590.00 (▲ 0.69)
Silver	₹110,530.00 (▲ 2.63)
Dollar Index	97.6 (▲ 0.32)
INR/USD	85.65 (▼ -0.04)
India 10Y Bond Yield	6.31 (▲ 0.16)
US 10Y Bond Yield	4.35 (▲ 0.23)

Indian Market	
BSE Sensex	83,190.28 (▼ -0.41)
NIFTY 50	25,355.25 (▼ -0.47)
BSE SENSEX 50	26,494.64 (▲ 1.86)
NIFTY NEXT 50	68,523.45 (▼ -0.23)
BSE SENSEX Next 50	84,788.81 (▼ -0.14)
NIFTY BANK	56,956.00 (▼ -0.45)
BSE BANKEX	63,758.93 (▲ 0.10)
NIFTY FINANCIAL SERVICES	26,984.35 (▼ -0.61)
BSE FINANCIAL SERVICES	12,813.13 (▼ -0.93)
NIFTY MIDCAP SELECT	13,211.05 (▼ -4.39)
BSE MIDCAP	46,593.14 (▼ -0.70)
INDIA VIX	11.62 (▼ -3.73)

- The RBI will conduct a ₹2.5 lakh crore 7-day VRRR auction on July 11, 2025, to absorb surplus liquidity and align short-term rates with the repo rate.
- Bihar now ranks 10th among Indian states in stock market investor base, surpassing Delhi, Haryana and Punjab, reflecting a rapid rise in equity participation.
- Glenmark's subsidiary, IGI, licensed the cancer drug ISB 2001 to AbbVie for \$700 million upfront, with up to \$1.225 billion in potential milestones; AbbVie gains rights in major markets.
- Gold ETFs saw a 600% surge in monthly inflows to ₹2,080 crore in June 2025, driven by geopolitical tensions, resilient prices and safe-haven demand.
- Rising SIP mutual fund flows have turned analysts bullish on AMC stocks like HDFC AMC, UTI AMC and Nippon AMC, expecting earnings recovery and further upside.
- Amazon launched its 10-minute delivery service, Amazon Now, in select Delhi pin codes, directly challenging Blinkit, Zepto and Instamart in India's quick commerce market.
- ED raided Probo in Gurugram over alleged illegal gambling and money laundering, freezing ₹284.5 crore in assets and investigating offshore funding, KYC lapses and misleading ads.
- SBI plans to raise ₹25,000 crore via a qualified institutional placement next week, its first since 2017, to strengthen capital amid growth plans.

## Geopolitical Updates:

- India and the US are close to a mini trade deal, with talks ongoing before US tariffs are set to resume on August 1; sensitive agricultural issues remain unresolved.
- A Chinese research vessel secretly operated in the Bay of Bengal, disabling its AIS, likely conducting military-linked research near Indian naval zones, raising regional security concerns.

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