

### FII/DII Activity (in ₹crores)

FII (Cash)	-1,614.32
DII (Cash)	1,787.68
FII (Index Futures)	-3,277.84
FII (Stock Futures)	-262.37
FII (Index Options)	-9,963.78
FII (Stock Options)	267.78

### Global Market Snapshot

Dow Jones	44,459.65	(▲ 0.20)
S&P 500	6,259.75	(▼ -0.33)
Nasdaq	20,585.53	(▼ -0.22)
Gift Nifty	25,152.00	(▼ -0.16)
Nikkei 225	39,459.62	(▼ -0.28)
Hang Seng	24,203.32	(▲ 0.27)

## Recent IPO Updates:

- GIFT City, Gujarat, will see its first IPOs soon, with several companies, including an edtech firm, preparing to list under the new IFSCA direct listing framework.
- Travel Food Services' ₹2,000 crore IPO allotment concluded on July 10; QIBs oversubscribed ~8×, NIIs ~1.7×, retail ~0.73×. Check status via the registrar site. Listing on July 14.
- Fractal Analytics, prepping for a \$400–500 million IPO, raised \$170 million via secondary sale of a 6% stake by Apax Partners, valuing it at \$2.44 billion. Funds will boost GenAI services and global expansion, with potential IPO valuation near \$3 billion
- This week's IPO rush: Chemkart India, Travel Food Services, Smarten Power Systems, Glen Industries, Asston Pharmaceuticals and Smartworks Coworking Spaces are listed on Indian exchanges.

## P.E. & Funding Updates:

- Vaaree, a home decor platform and Avis Hospital, a specialty care provider, raised early-stage funding to expand operations, enhance technology and increase market reach.
- Veteran banker Ravi Kapoor is launching Indusbridge Ventures, a ₹1,000 crore defence-aerospace fund to boost India's military manufacturing and exports under "Make in India."

### Macro Data

Brent Crude	\$69.21	(▼ -1.63)
Gold	₹98,350	(▼ -0.14)
Silver	₹112,660	(▼ -1.96)
Dollar Index	98.12	(▲ 0.28)
INR/USD	85.99	(▲ 0.22)
India 10Y Bond Yield	6.31	(▼ -0.16)
US 10Y Bond Yield	4.44	(▲ 0.68)

- AI research startup Gibran raised \$2.6 million from Together Fund to build adaptive, nature-inspired AI that evolves with users; early results expected by December 2025.
- Chennai-based robotics startup Unibose raised ₹5.5 crore in pre-Series A funding to scale its ATEX Zone-0 compliant robots for hazardous industrial environments.

## Business & Economic Updates:

- Wholesale price inflation in India turned negative in June 2025, registering -0.13%. Falling prices in food, fuel and manufactured goods drove this decline.
- Jane Street deposited ₹4,843 crore in a Sebi escrow account, allowing it to resume India trading after a ban over alleged manipulative derivatives trades.
- Bitcoin surged past \$120,000 for the first time, driven by institutional inflows, optimism over U.S. crypto regulations and strong support from President Trump.
- India's retail inflation fell to a six-year low of 2.1% in June 2025, mainly due to sharp declines in food prices, especially vegetables and pulses.
- Silver prices in India reached a record ₹1,15,000 per kg on July 14, 2025, after a sharp ₹5,000 surge earlier that week.
- Temasek plans to invest more in Indian family-run businesses after acquiring a 10% stake in Haldiram's, attracted by strong brands and loyal customers.

### Indian Market

BSE Sensex	82,253.46	(▼ -0.30)
NIFTY 50	25,082.30	(▼ -0.27)
BSE SENSEX 50	26,216.64	(▼ -0.25)
NIFTY NEXT 50	68,285.65	(▲ 0.47)
BSE SENSEX Next 50	84,296.90	(▲ 0.49)
NIFTY BANK	56,765.35	(▲ 0.02)
BSE BANKEX	63,596.91	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,802.25	(▼ -0.19)
BSE FINANCIAL SERVICES	12,747.08	(▲ 0.07)
NIFTY MIDCAP SELECT	13,169.00	(▲ 1.10)
BSE MIDCAP	46,600.13	(▲ 0.67)
INDIA VIX	11.73	(▼ -3.14)

- Tesla officially enters India today, opening its first Mumbai showroom to showcase Model 3, Model Y and Model X; prices start at ₹50–60 lakh.

## Geopolitical Updates:

- India and the US are close to an interim trade deal, likely capping US tariffs on Indian goods below 20%, avoiding steep duties set for August 1.
- India-China relations have made good progress over the past nine months, mainly due to resolving border friction; further normalization now depends on achieving border de-escalation.
- European trade ministers vowed unity after Trump's surprise 30% tariffs on EU goods, preparing retaliatory measures but pausing immediate action to allow for negotiations.
- Indian EAM Subrahmanyam Jaishankar, during his July 14 Beijing talks with China's Wang Yi, urged the removal of trade roadblocks—especially rare-earth magnet export restrictions—to boost economic cooperation.

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