

FII/DII Activity (in ₹crores)

FII (Cash)	120.47
DII (Cash)	1,555.03
FII (Index Futures)	-153.26
FII (Stock Futures)	117.83
FII (Index Options)	4,337.41
FII (Stock Options)	-133.24

Global Market Snapshot

Dow Jones	44,023.29	(▼ -0.98)
S&P 500	6,268.56	(▲ 0.14)
Nasdaq	20,640.33	(▲ 0.27)
Gift Nifty	25,265.50	(▲ 0.45)
Nikkei 225	39,678.02	(▲ 0.55)
Hang Seng	24,590.12	(▲ 1.60)

Recent IPO Updates:

- WeWork India received SEBI approval for its IPO, which is a pure offer for sale of up to 43.75 million shares by existing shareholders. No new shares will be issued. Embassy Buildcon LLP and 1 Ariel Way Tenant Limited are the selling shareholders.
- Studs Accessories received SEBI approval for a pure offer-for-sale IPO of up to 7.79 million shares; no new funds will go to the company.
- Indira IVF, backed by EQT, revived its ₹3,500 crore (\$408 million) IPO. Existing shareholders, including EQT and founders, will sell shares; no new stock issued.
- Spunweb Nonwoven IPO was oversubscribed 45.14 times by Day 2, with retail bids at 66.64x and strong GMP signalling expected premium listing on NSE SME.
- Lamtuf filed for IPO with SEBI, offering fresh shares and OFS. Proceeds will fund Telangana plant expansion, working capital and corporate purposes; NSE, BSE listing planned.
- AceVector Snapdeal's parent company reportedly preparing to file its draft red herring prospectus (DRHP) for INR 500 Cr IPO.

P.E. & Funding Updates:

- The Wedding Company raised \$1 million in a pre-seed round co-led by LVX and Tremis Capital. Funds will fuel expansion, technology and vendor partner network growth.
- AI video platform Trupeer, designed for software and business workflows, raised \$3 million in a seed funding round led by RTP Global.
- Dial4242 raised ₹9 crore in a pre-series A round led by IAN Group to improve technology, reduce ambulance response times, and expand services across India.

Macro Data		
Brent Crude	\$68.71	(▼ -0.72)
Gold	₹97,740	(▼ -0.62)
Silver	₹111,690	(▼ -0.86)
Dollar Index	98.64	(▲ 0.53)
INR/USD	85.82	(▼ -0.20)
India 10Y Bond Yield	6.31	(▲ 0.00)
US 10Y Bond Yield	4.49	(▲ 1.13)

Indian Market		
BSE Sensex	82,570.91	(▲ 0.39)
NIFTY 50	25,195.80	(▲ 0.45)
BSE SENSEX 50	26,328.83	(▲ 0.43)
NIFTY NEXT 50	68,727.55	(▲ 0.65)
BSE SENSEX Next 50	85,150.46	(▲ 1.01)
NIFTY BANK	57,006.65	(▲ 0.43)
BSE BANKEX	63,775.26	(▲ 0.28)
NIFTY FINANCIAL SERVICES	26,928.95	(▲ 0.47)
BSE FINANCIAL SERVICES	12,817.98	(▲ 0.56)
NIFTY MIDCAP SELECT	13,342.05	(▲ 1.31)
BSE MIDCAP	46,985.42	(▲ 0.83)
INDIA VIX	11.48	(▼ -2.13)

- PayU India, a Fintech firm, has raised Rs 302 crore (approximately \$35 million) from its Dutch parent, Prosus, as the company intensifies efforts to make its credit business profitable by September.

Business & Economic Updates:

- India's June trade deficit narrowed to \$18.78 billion as imports fell sharply. Exports dipped, but strong services and rising drugs, electronics buoyed performance.
- India's June unemployment rate remained unchanged at 5.6%. Youth unemployment rose to 15.3%, with female youth joblessness at 17.4%. Labour participation fell slightly.
- IRDAI proposes doubling insurers' investment cap in REITs and InvITs from 3% to 6% of own funds or assets, boosting infrastructure and real estate funding.
- India may raise the FDI cap in public sector banks above 20%, pending an RBI review of voting rights and shareholding norms; the government retains a 51% stake.
- The Power Ministry launched the ₹1,000 crore ADEETIE scheme offering 3–5% interest subvention and technical support to MSMEs for adopting energy-efficient technologies across 14 sectors.
- SEBI urges Alternative Investment Funds to drive ESG adoption in unlisted firms, aligning with global standards, as India needs \$250 billion for its green transition by 2030.
- Tesla launched the Model Y in India, priced from ₹59.89 lakh, with deliveries from Q3 2025. High prices reflect steep import tariffs and taxes.
- India's June unemployment rate stayed at 5.6%, unchanged from May. Rural joblessness fell to 4.9%; urban joblessness rose to 7.1%. Youth unemployment increased to 15.3%.

- India's retail investor base in stock markets has soared, with NSE investor accounts surpassing 22 crore in April 2025, reflecting expanding, democratized financial participation.
- Mumbai climbed 15 spots to 98th, while Delhi rose to 104th and is now the world's most affordable student city in the QS 2026 rankings; Bengaluru and Chennai also improved.

Geopolitical Updates:

- External Affairs Minister Jaishankar briefed President Xi on improved India-China relations, conveyed Indian leaders' greetings and emphasized positive developments and leader-level guidance during his China visit.
- Russia is ready to negotiate with Ukraine after Trump threatened sanctions and new weapons for Kyiv, but Moscow rejects ultimatums and demands that its concerns be addressed.
- India and the EU exchanged offers on goods and services for their Free Trade Agreement, making significant progress; both aim to conclude negotiations by the end of 2025.
- During a July 4 call, Trump asked Zelensky if Ukraine could strike Moscow and St. Petersburg if given US weapons, signaling a harder stance on Russia.

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