

FII/DII Activity (in ₹crores)	
FII (Cash)	-1858.15
DII (Cash)	1,223.55
FII (Index Futures)	690.96
FII (Stock Futures)	121
FII (Index Options)	-3614.91
FII (Stock Options)	107.4

Recent IPO Updates:

- NephroPlus plans a ₹2,000 crore IPO, combining fresh issue and offer for sale. Proceeds will fund dialysis center expansion and acquisitions in India and the Philippines.
- Anthem Biosciences' ₹3,395 Cr IPO oversubscribed by July 16, anchored by strong QIB interest; shares likely list around July 21 with 27% grey-market premium.
- SAT dismisses plea seeking stay on Smartworks IPO, clearing the way for its ₹583 crore public issue.

P.E. & Funding Updates:

- Vaaree raised \$4.6M to scale its AI-powered home décor platform, expand next-day delivery network, and strengthen presence in metro and tier-2 Indian cities.
- Zeus Hygia raised \$2.5 million Series A from NABVENTURES to expand globally, boost R&D and develop herbal products for pain relief, weight, women's health and aging.
- Zulu Club raised \$250K pre-seed to expand 100-minute try-at-home fashion delivery in Delhi NCR, aiming to reduce returns and enhance millennial shopping experience.
- Voice AI startup Navana AI raises ₹7 crore in a round led by Antler India to scale its India-focused language platform.
- Phi Commerce has raised \$10 million (about ₹83 crore) in a funding round led by BEENEXT to accelerate its international expansion and product development.
- Healthtech startup Truemeds has raised around \$20 million (INR 174 crore) from Peak XV Partners as part of its ongoing Series C funding round.
- Ritesh Agarwal backs Culture Circle—youth-focused luxury fashion app—at over ₹100 Cr valuation. The platform has 1M+ monthly users; funds to scale AI engine and global expansion.

Global Market Snapshot	
Dow Jones	44,254.78 (▲ 0.52)
S&P 500	6,243.76 (▼ -0.40)
Nasdaq	20,677.80 (▲ 0.18)
Gift Nifty	25,231.00 (▼ -0.14)
Nikkei 225	39,663.40 (▼ -0.04)
Hang Seng	24,517.76 (▼ -0.30)

Business & Economic Updates:

Macro Data	
Brent Crude	\$68.52 (▼ -0.28)
Gold	₹3,347.11 (▲ +0.05)
Silver	₹111,635.00 (▼ -0.05)
Dollar Index	98.3 (▲ +0.35)
INR/USD	85.95 (▲ +0.15)
India 10Y Bond Yield	6.32 (▲ +0.16)
US 10Y Bond Yield	4.46 (▼ -0.67)

Indian Market	
BSE Sensex	82,634.48 (▲ +0.08)
NIFTY 50	25,212.05 (▲ +0.06)
BSE SENSEX 50	26,340.03 (▲ +0.04)
NIFTY NEXT 50	68,870.55 (▲ +0.21)
BSE SENSEX Next 50	85,239.08 (▲ +0.10)
NIFTY BANK	57,168.95 (▲ +0.28)
BSE BANKEX	63,913.48 (▲ +0.22)
NIFTY FINANCIAL SERVICES	26,916.40 (▲ -0.05)
BSE FINANCIAL SERVICES	12,821.81 (▲ +0.03)
NIFTY MIDCAP SELECT	13,323.35 (▲ -0.14)
BSE MIDCAP	47,033.02 (▲ +0.10)
INDIA VIX	11.24 (▼ -2.14)

- The Indian government has approved over Rs 50,000 crore for agriculture and renewable energy. Key schemes support holistic farm development, solar, wind and clean technology investments.
- Jio BlackRock AMC raised ₹17,800 Cr via 3 debt NFOs; SEBI approved five passive index funds. Leveraging Jio's 475 M users and BlackRock's Aladdin, scaling ahead.
- SBI plans ₹45,000 Cr fundraising in FY26: ₹20,000 Cr via Basel III-compliant AT1/Tier II bonds and ₹25,000 Cr through first QIP since FY18, floor at ₹811/share.
- SEBI proposes gold, silver ETFs be valued using domestic spot prices from exchanges like MCX, replacing LBMA benchmarks to enhance transparency and standardize asset management practices.
- Oil prices are seeing volatility today due to escalating trade tensions impacting global markets.
- India's thermal power investments will double to ₹2.3 lakh crore in three years, driven by rising demand, private sector growth and ongoing capacity expansions.
- India approved the DRDO-led ₹20,000 crore project to develop six indigenous AWACS on Airbus A321, enhancing air surveillance with AESA radar and 360-degree coverage.
- Apple's iPhone production in India surged 53% in H1 2025, reaching 23.9 million units. Exports totaled \$22.56 billion, driven by diversification and U.S. tariff concerns.
- Regulatory curbs on speculative trading make asset management companies safer bets than brokers in India, benefiting from steady mutual fund inflows and long-term growth potential.

- India's Cabinet approved NTPC's ₹20,000 crore investment cap boost for green energy arms, aiming to expand renewable capacity to 60 GW by 2032.

Geopolitical Updates:

- India and the US are nearing an agreement on a trade deal, with India seeking tariffs lower than Indonesia's 19%, potentially below 10%.
- Peru and Chile are progressing in talks to strengthen their free trade agreement amid efforts to boost regional trade.
- NATO chief warns India, China, Brazil may face US secondary sanctions for trading with Russia, urging them to push Putin towards peace negotiations to avoid repercussions.
- Trump plans up to 200% tariffs on Indian pharmaceutical imports from August 2025, aiming to boost U.S. drug production and impact \$9.8 billion Indian exports.
- Israeli Prime Minister Benjamin Netanyahu's coalition lost its majority after the ultra-Orthodox Shas party resigned over military draft exemptions, following United Torah Judaism's exit.
- Israel bombed Syria's military HQ after warning to protect the Druze minority amid sectarian clashes; nearly 250 died. The strike aims to prevent further violence.

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