

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,694.31
DII (Cash)	2,820.77
FII (Index Futures)	-1,989.23
FII (Stock Futures)	-1488.48
FII (Index Options)	13,985.29
FII (Stock Options)	-257.1

Global Market Snapshot	
Dow Jones	44,484.49 (▲ 0.52)
S&P 500	6,263.70 (▲ 0.32)
Nasdaq	20,730.49 (▲ 0.25)
Gift Nifty	25,148.00 (▼ -0.33)
Nikkei 225	39,901.19 (▲ 0.60)
Hang Seng	24,498.95 (▼ -0.08)

Recent IPO Updates:

- Indian startups launched CNPC to support \$90 billion worth IPOs, providing regulatory guidance and market readiness, aiding tech firms' smooth transition to public markets.
- GNG Electronics plans a ₹450 crore IPO, combining fresh issue and offer for sale, to repay debt and expand, listing on BSE and NSE July 30, 2025.
- IndiQube Spaces' ₹700 crore IPO opens July 23 at ₹225–237 per share, funding expansion, debt repayment; manages 115 properties across 15 cities with 186,719 seats (March 2025).

P.E. & Funding Updates:

- Uniphore is in advanced talks to raise up to \$250 million in fresh funding.
- Uber is considering a \$300 million investment in electric automaker Lucid Motors.
- DCG Tech raised ₹15 crore led by GVFL to expand tech, operations and global reach. It serves 60,000+ customers with 10,000+ packaging products across India.
- Parkobot, an IoT-based "Airbnb for parking," raised ₹2.09 crore led by Inflection Point Ventures to expand infrastructure, markets and product offerings, easing urban parking challenges.
- Chennai-based drone startup Zuppa raised \$1.5 million to enhance R&D, focusing on GPS-denied navigation, AI targeting and defense sector expansion in India.

Macro Data	
Brent Crude	\$69.52 (▲ 1.44)
Gold	₹97,473.00 (▼ -0.32)
Silver	₹112,334.00 (▲ 0.62)
Dollar Index	98.65 (▲ 0.35)
INR/USD	86.09 (▲ 0.16)
India 10Y Bond Yield	6.31 (▼ -0.16)
US 10Y Bond Yield	4.46 (▼ 0.00)

Indian Market	
BSE Sensex	82,259.24 (▼ -0.46)
NIFTY 50	25,111.45 (▼ -0.40)
BSE SENSEX 50	26,230.07 (▼ -0.42)
NIFTY NEXT 50	68,711.45 (▼ -0.23)
BSE SENSEX Next 50	85,038.08 (▼ -0.24)
NIFTY BANK	56,828.80 (▼ -0.60)
BSE BANKEX	63,586.81 (▼ -0.51)
NIFTY FINANCIAL SERVICES	26,809.45 (▼ -0.40)
BSE FINANCIAL SERVICES	12,771.88 (▼ -0.39)
NIFTY MIDCAP SELECT	13,264.75 (▼ -0.44)
BSE MIDCAP	47,066.00 (▲ 0.07)
INDIA VIX	11.24 (▲ 0.00)

- Burger Singh raised ₹47.15 crore to expand operations, targeting 1,000 outlets by 2026, with 175 outlets currently across 75 cities and ₹77.7 crore FY24 revenue.
- Lo! Foods raised \$3.5 million in Series B to expand warehousing, tech, offline pilots and branding; its Protein Chef drives ₹100 crore annual revenue.

Business & Economic Updates:

- India's insurtech funding plunged over 70% from a \$820 million peak in 2021 to \$239 million in 2024, prompting consolidation and focus on sustainable growth.
- Prime Minister Modi will inaugurate over ₹7,000 cr in Bihar projects on July 18 at Motihari, spanning railways, highways, rural development, IT, animal husbandry, housing and SHGs.
- India's agricultural and processed food exports rose 7% in Q1 (April–June 2025), reaching \$5.96 billion, driven by strong global demand.
- India's securities regulator SEBI fined Prabhudas Lilladher ₹11 lakh for misusing client funds, incorrect margin and ledger reporting, overstating net worth and transferring ₹1.3 cr in securities wrongly during 2021–22.
- India's MCX Gold futures fell 0.30% to ₹97,490 per 10 g amid a stronger dollar and weak global cues, while MCX Silver rose 0.10% to ₹1,11,748 amid robust demand.
- SBI's ₹25,000 cr QIP received bids worth ₹1 trillion, led by LIC and major domestic mutual funds; proceeds will raise CET-1 ratio by 60 bps.

- Adani Group sold 20% stake in Adani Wilmar to Wilmar International for ₹7,150 crore, exiting the FMCG sector to focus on core infrastructure businesses.
- Rupee weakened 22 paise to ₹86.02 against the U.S. dollar, pressured by a stronger dollar and crude oil rise; exporter sales and inflows limited losses.

Geopolitical Updates:

- India rejects NATO sanctions threat, prioritizing energy security. Warns West against double standards. Rutte pressures India, Brazil, China to urge Russia on peace talks.
- India strongly rejected NATO chief Mark Rutte's sanctions warning, emphasizing energy security as paramount, warning against "double standards," and affirming decisions guided by market realities and national interests.
- India clarified that de-dollarisation is not on the BRICS agenda. Focus is on cross-border payments in local currencies; India is expanding rupee-denominated trade mechanisms.
- The US House and Senate have passed President Trump's \$9 billion package cutting foreign aid and public broadcasting, now awaiting his signature.

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