

FII/DII Activity (in ₹crores)	
FII (Cash)	374.74
DII (Cash)	2,103.51
FII (Index Futures)	-2,395.42
FII (Stock Futures)	-1177.52
FII (Index Options)	-3,529.83
FII (Stock Options)	-101

Global Market Snapshot	
Dow Jones	44,484.49 (▲ 0.00)
S&P 500	6,297.36 (▲ 0.53)
Nasdaq	20,885.65 (▲ 0.74)
Gift Nifty	25,027.50 (▼ -0.48)
Nikkei 225	39,901.19 (▲ 0.00)
Hang Seng	24,498.95 (▲ 0.00)

Recent IPO Updates:

- Repono Limited IPO opens July 28–30 at ₹91–95 per share for ₹25.3–26.4 cr fresh issue, lot size 2,400 shares, listing on BSE SME.
- The post-pandemic tourism boom boosts travel companies' IPO plans, including Travel Food Services and Cordelia Cruises, while hospitality firms like LaRiSa Hotels prepare public listings.
- JSW Cement plans a ₹4,000 crore IPO in August 2025 at ₹20,000 crore valuation to fund expansion, debt repayment and green cement projects.
- Udaan acquired retail-tech startup ShopKirana for \$88.5 million in stock, boosting FMCG and staples reach, enhancing supply chain and preparing for IPO.
- Milky Mist aims to raise ₹357 crore in pre-IPO funding, targeting over ₹2,000 crore total raise with IPO, expanding its dairy product portfolio and valuation.
- NSDL will start accepting IPO investor orders next week, raising up to \$500 million via Offer For Sale by shareholders, with no proceeds to NSDL itself.

P.E. & Funding Updates:

- W Health Ventures raises \$100M fund focusing on early-stage healthcare startups in India and US, investing \$1-5M, combining investment with incubation for growth.
- Altum Credo plans to raise ₹100 crore in Series C1 to expand lending for low-income homebuyers, valued at ₹1,694 crore after a recent \$40 million round.
- BQP, a quantum simulation startup, secured \$4.9 million in seed funding led by Monta Vista Capital, aiming to enhance its digital twin platform, BQPhy.

Macro Data		
Brent Crude	\$69.52	(▲ 0.00)
Gold	₹98,440.00	(▲ 0.98)
Silver	₹113,140.00	(▲ 0.71)
Dollar Index	98.73	(▲ 0.08)
INR/USD	86.09	(▲ 0.00)
India 10Y Bond Yield	6.31	(▲ 0.00)
US 10Y Bond Yield	4.46	(▲ 0.00)

Indian Market		
BSE Sensex	82,259.24	(▲ 0.00)
NIFTY 50	24,968.40	(▼ -0.57)
BSE SENSEX 50	26,086.04	(▼ -0.55)
NIFTY NEXT 50	68,225.15	(▼ -0.71)
BSE SENSEX Next 50	84,384.85	(▼ -0.77)
NIFTY BANK	56,283.00	(▼ -0.97)
BSE BANKEX	62,741.65	(▼ -1.35)
NIFTY FINANCIAL SERVICES	26,556.15	(▼ -0.95)
BSE FINANCIAL SERVICES	12,664.22	(▼ -0.85)
NIFTY MIDCAP SELECT	13,171.00	(▼ -0.71)
BSE MIDCAP	46,775.77	(▼ -0.62)
INDIA VIX	11.39	(▲ 1.32)

- Omspace raised \$3 million pre-seed to finalize rocket prototype tests, expand R&D and develop reusable launch vehicles for small satellites, aiming for commercial launch by 2028.

Business & Economic Updates:

- Tata Group has established the AI-171 Memorial & Welfare Trust with ₹500 crore—₹250 crore each from Tata Sons and Tata Trusts—for ₹1 crore ex-gratia, medical aid, trauma recovery and rebuilding the BJ Medical College hostel.
- EU imposes fresh sanctions targeting Rosneft's India-linked refinery and slashes Russian oil price cap (from \$60 to \$47.6/barrel), disrupting exports yet potentially benefiting India's import costs.
- Uttarakhand's Chief Minister announced ₹1 lakh crore has been realized on-ground since the December 2023 Global Investor Summit—out of ₹3.57 lakh crore MoUs—in various sectors.
- RBI absorbed ₹2 lakh crore through a 7-day VRRR auction at 5.49%, despite surplus liquidity, influenced by GST outflows and rising TREPS rates.
- SEBI proposes mutual fund overhaul: limits portfolio overlaps, allows value & contra funds, permits residual investments in alternatives, revamps naming conventions—feedback by August 8.
- RBI Deputy Governor M. Rajeshwar Rao emphasized that climate risks threaten MSMEs, unorganised sectors and unlisted firms, urging timely risk assessments and transparent information sharing.
- The government urges public sector banks to boost startup lending by partnering with educational institutions, supporting early-stage ventures and-

organizing hackathons to foster innovation and entrepreneurship.

- The Wealth Company received SEBI approval to start mutual fund operations, targeting Tier-3+ markets with high-quality products, aiming to democratize wealth creation in India.
- SEBI proposes allowing mutual funds to launch additional schemes if flagship schemes exceed ₹50,000 crore AUM, aiming to boost investor choice and market competition.

Geopolitical Updates:

- Trump mulls imposing up to 30% duties on EU exports, risking 15% of champagne sales (10% volume), driving up U.S. prices and supply chain jobs.
- China rolled out incentives—tax breaks, simpler approvals, land-leasing flexibility and financial support—encouraging foreign firms to reinvest profits domestically after a 13.2% drop in FDI.
- Nvidia CEO Jensen Huang unexpectedly acted as a diplomatic bridge—meeting US (Trump) and Chinese officials—successfully negotiating H20 chip export resumption and deeper AI collaboration.
- The US and Japan are optimistic about reaching a beneficial trade deal, focusing on tariff concessions, economic cooperation and avoiding disruptions amid global trade tensions.

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