

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	44,342.19 (▼ -0.32)
S&P 500	6,297.36 (▲ 0.00)
Nasdaq	20,885.65 (▲ 0.00)
Gift Nifty	25,027.50 (▲ 0.00)
Nikkei 225	39,819.11 (▼ -0.21)
Hang Seng	24,825.66 (▲ 1.33)

Recent IPO Updates:

- Nine IPOs open this week: Anthem Biosciences, Indiqube Spaces, GNG Electronics, Brigade Hotel Ventures, Shanti Gold, plus five SME issues, with three listings scheduled.
- NLC India's renewable arm, NIRL, will raise ₹4,000 crore via an IPO in Q2 FY27 to partly fund its expansion from 1.4 GW to 10 GW by 2030.
- Shanti Gold International IPO opens July 25 at ₹189–199 per share. The lot size is 75 shares. The issue size is ₹360.11 crore and lists August 1.
- Sellowrap Industries IPO opens July 25 with a price band of ₹79–83 per share. Lot size is 1,600 shares; issue size ₹28.8–30.3 crore.
- Brigade Hotel Ventures' ₹759.6 crore IPO opens July 24 at ₹85–90 per share; it's a fresh issue to repay debt, buy land and pursue acquisitions.

P.E. & Funding Updates:

- Between July 14 and 19, 2025, 26 Indian startups across sectors like Deeptech, IoT, Spacotech, AI, Fintech and Healthcare collectively raised over \$110 million from investors, reflecting robust funding momentum.
- Cure.fit is an Indian health and fitness company offering digital and offline services, including workouts, healthy meals, mental wellness and diagnostics through its app and physical centers.

Business & Economic Updates:

- Foreign investors' bearish derivative bets on India surged to a five-month high as the long-short ratio fell to 15%, reflecting cautious market sentiment amid global uncertainties.
- Failure to disclose foreign assets or income in Indian tax returns will attract a ₹10 lakh penalty per year and possible prosecution, warns the Income Tax Department.

Macro Data	
Brent Crude	\$69.28 (▼ -0.35)
Gold	₹98,850.00 (▲ 0.42)
Silver	₹113,380.00 (▲ 0.21)
Dollar Index	98.48 (▼ -0.25)
INR/USD	86.16 (▲ 0.08)
India 10Y Bond Yield	6.3 (▼ -0.16)
US 10Y Bond Yield	4.46 (▲ 0.00)

- The government plans low-cost credit cards with a ₹5 lakh limit for micro enterprises, offering credit guarantee and affordable interest, to address cash flow challenges and boost MSMEs.
- Venture debt surged in H1 2025 as Indian startups, facing selective equity funding, raised over ₹2,100 crore through 130+ deals, prioritizing non-dilutive capital.
- Midcap and smallcap earnings growth, projected at 22-23% and 10-15% respectively, are set to outshine Nifty 50, despite ongoing valuation concerns.

Geopolitical Updates:

- India and the US concluded the fifth round of trade pact talks, discussing tariffs, agriculture and duty concessions, to reach an interim deal before August.
- Israel ordered new evacuations in central Gaza's Deir al-Balah amid stalled truce talks, intensifying military operations after over 58,000 Palestinians have been killed.
- Iran will hold nuclear talks with Britain, France, and Germany in Istanbul on July 25, after threats from Europe to reimpose UN sanctions.
- Prime Minister Modi will visit the UK on July 23-24 to sign the India-UK Free Trade Agreement, then attend the Maldives' Independence Day celebrations and strengthen bilateral ties.
- The EU is readying a retaliation plan, including tariffs on US goods, as America's trade stance hardens ahead of an August 1 deadline for negotiations.
- President Putin is ready to discuss peace in Ukraine, but insists Russia will only agree to a settlement once its main objectives are achieved.

Indian Market	
BSE Sensex	82,259.24 (▲ 0.00)
NIFTY 50	24,968.40 (▲ 0.00)
BSE SENSEX 50	26,086.04 (▲ 0.00)
NIFTY NEXT 50	68,225.15 (▲ 0.00)
BSE SENSEX Next 50	84,384.85 (▲ 0.00)
NIFTY BANK	56,283.00 (▲ 0.00)
BSE BANKEX	62,741.65 (▲ 0.00)
NIFTY FINANCIAL SERVICES	26,556.15 (▲ 0.00)
BSE FINANCIAL SERVICES	12,664.22 (▲ 0.00)
NIFTY MIDCAP SELECT	13,171.00 (▲ 0.00)
BSE MIDCAP	46,775.77 (▲ 0.00)
INDIA VIX	11.39 (▲ 0.00)

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