

FII/DII Activity (in ₹crores)

FII (Cash)	-4,209.11
DII (Cash)	4,358.52
FII (Index Futures)	760.01
FII (Stock Futures)	1260.68
FII (Index Options)	-1,557.13
FII (Stock Options)	161.2

Global Market Snapshot

Dow Jones	45,010.29	(▲ 1.14)
S&P 500	6,309.62	(▲ 0.06)
Nasdaq	20,892.68	(▼ -0.39)
Gift Nifty	25,248.50	(▲ 0.66)
Nikkei 225	41,171.32	(▲ 3.51)
Hang Seng	25,538.07	(▲ 1.62)

Recent IPO Updates:

- Laxmi India Finance set its IPO price band at ₹150–158, opening July 29, aiming to raise ₹254 crore via fresh issue and offer for sale.
- Takyon Networks, an IT infrastructure firm, plans an SME IPO to raise funds for working capital and debt repayment, with listing on the BSE SME platform soon.
- Sri Lotus Developers, backed by Bollywood stars, launches ₹792 crore fresh IPO July 30–August 1, funding luxury real estate projects; listing expected August 6, 2025.
- Mehul Colours Ltd launches SME IPO on BSE to raise funds for new manufacturing facility, working capital; specializes in masterbatches contributing 81.56% of revenue.
- Aditya Infotech files ₹1,300 crore IPO with SEBI, including ₹500 crore fresh issue and ₹800 crore offer for sale, to repay debt and fund growth.

P.E. & Funding Updates:

- Gupshup raised \$60 million from Globespan and EvolutionX to expand its conversational AI platform globally and plans an IPO in the next 12–24 months.
- Pristyn Care raised \$4 million to expand its owned hospitals, aiming to double capacity to 400,000 sq ft and 900 beds by 2025; preparing a larger funding round.
- iTuring raised \$5M in Series A led by Dallas Venture and Mela Ventures to expand its zero-code AI/ML platform for BFSI automation, compliance and governance.
- GVFL invested in Magma's extended Series A to support its sustainable, tech-enabled supply chain solutions for factories, targeting ₹1,000 crore revenue in 24 months.
- Coluxe closed its friends and family round to launch a digital fine jewelry platform in August 2025, offering ethical, lab-grown diamond pieces for daily wear.

Macro Data	
Brent Crude	\$68.51 (▼ -0.12)
Gold	₹99,530.00 (▼ -1.32)
Silver	₹115,330.00 (▼ -0.99)
Dollar Index	97.21 (▼ -0.16)
INR/USD	86.42 (▲ 0.06)
India 10Y Bond Yield	6.3 (▲ 0.00)
US 10Y Bond Yield	4.39 (▲ 0.92)

Indian Market	
BSE Sensex	82,726.64 (▲ 0.66)
NIFTY 50	25,219.90 (▲ 0.63)
BSE SENSEX 50	26,343.19 (▲ 0.61)
NIFTY NEXT 50	68,363.00 (▲ 0.16)
BSE SENSEX Next 50	84,711.56 (▲ 0.42)
NIFTY BANK	57,210.45 (▲ 0.80)
BSE BANKEX	63,908.32 (▲ 0.75)
NIFTY FINANCIAL SERVICES	27,215.85 (▲ 0.84)
BSE FINANCIAL SERVICES	12,892.44 (▲ 0.70)
NIFTY MIDCAP SELECT	13,276.35 (▲ 0.53)
BSE MIDCAP	46,858.25 (▲ 0.24)
INDIA VIX	10.52 (▼ -2.14)

- Avalanche and Team1 launched a ₹1 crore grant fund to support young Web3 developers in India, offering funding, mentorship and growth opportunities for innovative projects.

Business & Economic Updates:

- Gold demand remained dull during the festive and wedding season as consumers preferred recycling household jewellery over purchasing new sets, reducing imports and weakening new gold bar and coin sales.
- IndusInd Bank's board approved raising ₹30,000 crore (₹20K debt, ₹10K equity) and allowing promoters to nominate two directors—actions prompted by recent accounting lapses and executive departures.
- Tilaknagar Industries will acquire Pernod Ricard's Imperial Blue whisky for ₹4,150 crore, funded via \$500 million debt and deferred payments, marking a major entry into India's whisky market.
- Invesco offloaded shares worth ₹3,202 crore of Oberoi Realty (~2.95%) and Lodha Developers (~0.95%) via block deals, causing their stocks to drop 2–7%.
- Natco Pharma submitted a firm ₹2,000 crore (ZAR 4 billion) cash offer to acquire a 35.75% stake in South Africa's Adcock Ingram, gaining regional market access. Deal expected in 4 months.
- Myntra and related firms are under an ED—FEMA probe for ₹1,654.35 crore in alleged FDI violations, accused of misusing the wholesale route for prohibited multi-brand retail trade.
- RBI net bought \$1.76 billion in May, reducing its net short forward dollar position to \$65.21 billion, down from \$72.57 billion in April.
- Inox Wind's board approved a ₹1,249–1,250 crore rights issue at ₹120/share (27% discount), offering five new shares per 78 held, record date July 29; opens Aug 6–20.

- Petronet LNG seeks ₹12,000 crore loan to fund petrochemical plant in Dahej and LNG terminal in Gopalpur, diversifying earnings beyond LNG imports.
- ADB cuts India's FY26 GDP growth forecast to 6.5% due to US tariff impacts and trade war, but expects a rebound to 6.7% in Fy27.
- RBI injected ₹50,000 crore via a two-day VRR auction to curb rising call rates, stabilizing short-term interest rates after the call rate hit 6.78%, above the repo rate.
- Good Glamm Group breaks up as lenders charge brands individually for sale; CEO Darpan Sanghvi pledges 25% future earnings to settle employee dues and restitution.

Geopolitical Updates:

- PM Modi arrived in the UK (July 23–24) to formally sign a long-awaited India–UK Free Trade Agreement, cutting tariffs on whisky, cars, EVs, textiles; awaiting legal review and ratification.
- Trump's new tariff plan, effective August 1, imposes 15–50% duties on imports, targeting most countries; smaller nations get 10%, while major economies negotiate exemptions.
- The EU plans a €100 billion tariff package targeting U.S. goods, including planes and cars, matching Trump's threatened 30% tariffs starting August 2025.
- Russia and Ukraine agreed on more prisoner swaps but no ceasefire or leaders' meeting; talks focused on humanitarian issues, with divisions remaining over key peace terms.
- Trump uses tariffs to block foreign digital taxes on US tech firms, pressuring countries like Canada and Brazil, but risks escalating global trade conflicts.

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