

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-2,133.69
DII (Cash)	2,617.14
FII (Index Futures)	1.65
FII (Stock Futures)	-947.77
FII (Index Options)	-1,856.35
FII (Stock Options)	126.03

Global Market Snapshot	
Dow Jones	44,693.91 (▼ -0.70)
S&P 500	6,358.91 (▲ 0.78)
Nasdaq	21,020.02 (▲ 0.61)
Gift Nifty	24,968.00 (▼ -1.11)
Nikkei 225	41,826.34 (▲ 1.59)
Hang Seng	25,667.18 (▲ 0.51)

- InMobi, backed by SoftBank, plans a \$1 billion IPO in India by late 2025, targeting a \$5-6 billion valuation; relocating HQ to India, focusing on AI and the Glance platform.
- Executive Centre India's ₹2,600 crore IPO, fully fresh equity, funds TEC Abu Dhabi investment and TEC Singapore-Dubai acquisitions; operates 89 centres in 7 countries; FY25 revenue ₹1,322.6 crore.
- PhysicsWallah, first edtech unicorn to go public, received SEBI nod for ₹4,000-4,600 crore IPO in 2025, raising fresh capital and offer-for-sale shares. Valuation ~\$2.8 billion.
- NSDL's IPO priced ₹760-800/share, offering ₹4,011 crore via offer-for-sale from July 30-August 1, 2025. Listing August 6; early investors gained 39,000% returns.
- M&B Engineering's ₹650 crore IPO opens July 30, price band ₹366-385/share; raises funds via ₹275 crore fresh issue, ₹375 crore OFS; listing August 6.
- Highway Infrastructure IPO comprises a ₹105 crore fresh issue and sale of 31 lakh shares; funds support working capital and corporate needs; strong tollway, EPC presence.
- NSE's retail investor base quadrupled to 157,000 by June 2025, boosting IPO hopes as the share price rose and the SEBI settlement nears completion.
- Shadowfax Technologies plans a ₹2,000-2,500 crore IPO, mixing fresh equity and offer-for-sale. It operates in logistics, backed by Flipkart and others, with 75% e-commerce revenue. Proceeds fuel growth.

## P.E. & Funding Updates:

- SuperK raised ₹100 crore in Series B funding led by Binny Bansal, Mithun Sacheti and Shubman Gill to expand its value retail stores in small towns.
- Netrasemi raised ₹107 crore from Zoho and Unicorn India to develop AI-powered system-on-chip variants, expand manufacturing, R&D and target smart infrastructure and robotics markets.
- Yali Capital raised \$104 million in its debut deep tech fund to invest in early-stage startups focused on AI, robotics, genomics, chip design and aerospace sectors.

Macro Data	
Brent Crude	\$69.18 (▲ 0.98)
Gold	₹98,970.00 (▼ -0.56)
Silver	₹115,430.00 (▲ 0.09)
Dollar Index	97.51 (▲ 0.31)
INR/USD	86.42 (▲ 0.00)
India 10Y Bond Yield	6.3 (▲ 0.00)
US 10Y Bond Yield	4.4 (▲ 0.23)

Indian Market	
BSE Sensex	82,184.17 (▼ -0.66)
NIFTY 50	25,062.10 (▼ -0.63)
BSE SENSEX 50	26,177.98 (▼ -0.63)
NIFTY NEXT 50	68,207.30 (▼ -0.23)
BSE SENSEX Next 50	84,185.10 (▼ -0.62)
NIFTY BANK	57,066.05 (▼ -0.25)
BSE BANKEX	63,541.81 (▼ -0.57)
NIFTY FINANCIAL SERVICES	27,046.30 (▼ -0.62)
BSE FINANCIAL SERVICES	12,819.72 (▼ -0.56)
NIFTY MIDCAP SELECT	13,107.65 (▼ -1.27)
BSE MIDCAP	46,658.44 (▼ -0.43)
INDIA VIX	10.72 (▲ 1.90)

- Evez, an electric mobility-as-a-service platform, raised \$5.4 million in Series A funding to expand affordable e-bike subscriptions, supporting 7,000 EVs in 15 cities, targeting 50,000 by FY27.
- Bharatsure, an Insurtech startup, raised ₹6 crore led by Inflection Point Ventures to scale insurance infrastructure and expand embedded/group insurance across 50 cities, supporting 2 lakh lives.
- Enlite raised ₹46 crore Series A led by Avaana Capital to expand in the Middle East, Southeast Asia and India; enhances edge AI, telemetry; serves real estate, pharma and hospitality.

## Business & Economic Updates:

- Indian seafood companies are expanding market share by diversifying exports, targeting premium domestic segments, exploring new markets and benefiting from government support and infrastructure investments.
- IEX shares dropped 30% after CERC approved market coupling for electricity exchanges, threatening IEX's dominance and revenue with increased competition from January 2026.
- Goldman Sachs downgraded Trent to neutral, citing Zudio store sales cannibalisation, cutting revenue and earnings estimates; the stock fell 4% amid growth concerns and uncertainty.
- RBI will conduct a ₹1.25 lakh crore Variable Rate Reverse Repo auction to absorb liquidity, continuing its active liquidity management in the banking system.
- Phoenix Mills will buy CPP's 49% stake in Island Star JV for ₹5,449 crore, making ISMDPL its wholly owned subsidiary to consolidate retail assets.
- The draft National Telecom Policy 2025 aims for universal 4G, 90% 5G coverage, 1 million jobs, doubled GDP contribution and boosted domestic telecom manufacturing by 2030.
- ED raided Anil Ambani's firms and Yes Bank over alleged ₹3,000 crore loan fraud involving illegal fund diversion, document manipulation and loan approval lapses between 2017-2019.
- India-UK FTA benefits MSMEs in labour-intensive sectors by providing duty-free access to the UK market, boosting exports, competitiveness and employment in key industrial hubs.

- India's private sector PMI rose to 60.7 in July, marking strong growth driven by manufacturing and services, despite slower job growth and declining business confidence.
- FY26 outlook for Indian IT services is slow, with 4–8% growth forecast amid geopolitical uncertainties, wage inflation and cautious hiring by top industry players.

## Geopolitical Updates:

- India and the UK signed a historic FTA, eliminating tariffs on 99% of Indian exports, boosting trade by \$34 billion annually and easing market access.
- U.S. President Trump announced a reciprocal tariff system with duties ranging from 15% to 50%, set to commence on August 1, targeting countries with no trade deals.
- Thousands of Ukrainians protested across Kyiv, Lviv, Odesa, Dnipro and other cities after President Zelensky passed a bill stripping independent anti-corruption agencies of autonomy under the prosecutor general's control.
- Xi Jinping met EU leaders at a tense, downsized summit in Beijing, highlighting deep rifts over trade imbalances, EV tariffs, Ukraine and economic overcapacity.
- Thailand and Cambodia's long-standing border dispute has escalated into heavy clashes involving artillery, rockets and F-16 airstrikes. At least 14 civilians killed in Thailand, 100k evacuated.
- India and the UK have signed a Comprehensive Economic and Trade Agreement, eliminating tariffs on 99% of Indian exports to Britain and enabling bilateral trade to soar to \$56 billion by 2030.
- Small cars and budget EVs are excluded from duty cuts in the India-UK trade deal, with concessions starting only in year six—and only for luxury EVs above £ 80k CIF value.
- India and the United Kingdom signed a landmark Comprehensive Economic and Trade Agreement, eliminating tariffs on ~99% of Indian exports and ~90% of UK goods to boost trade.

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