

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,979.96
DII (Cash)	2,138.59
FII (Index Futures)	-2,453.28
FII (Stock Futures)	-2531.71
FII (Index Options)	-2,441.30
FII (Stock Options)	573.02

- Indiqube Spaces IPO was subscribed over 12 times, with strong retail interest. Most brokerages recommend subscribing for the long term, citing sector growth despite current losses.
- Shanti Gold International's ₹ 360 crore IPO was subscribed 1.16 times on Day 1, led by strong 1.84 times retail demand. QIB participation remained extremely low at 0.01x.
- HDB Financial Services shares dropped 3%, near the IPO price, after Q1 FY26 results showed 2% profit decline, slower disbursements, rising credit costs and a cautious lending outlook.
- Amagi Media Labs, a Bengaluru-based cloud media firm, filed for a ₹1,020 crore IPO with fresh issue and offer-for-sale by investors, aiming to expand tech, infrastructure and growth. Promoters hold 31.74%.

Global Market Snapshot	
Dow Jones	44,693.91 (▲ 0.00)
S&P 500	6,363.35 (▲ 0.07)
Nasdaq	21,057.96 (▲ 0.18)
Gift Nifty	24,842.00 (▼ -0.50)
Nikkei 225	41,826.34 (▲ 0.00)
Hang Seng	25,667.18 (▲ 0.00)

P.E. & Funding Updates:

- EatClub raised ₹185 crore (\$22 million) led by Tiger Global, boosting valuation to \$540 million; plans to expand cloud kitchens and enhance operations across India.
- Defence tech startup Ammunic Systems raised \$1.1 million in seed funding led by India Accelerator to develop advanced electronic fuzes and indigenous defence technologies.
- Yali Capital secured Rs 893 crore deeptech fund, investing in semiconductors, AI, robotics and aerospace startups; exceeded target, backed by Infosys, Qualcomm Ventures and others.
- EVeex secured \$5.4 million Series A funding led by Michael & Susan Dell Foundation to expand affordable electric two-wheeler subscriptions for gig workers across India.

Business & Economic Updates:

- India-UK FTA protects sensitive sectors like dairy, cereals, pulses, gold, smartphones and optical fibres through exclusions or phased concessions; Scotch tariffs cut gradually.
- Bajaj Finance shares dropped over 5% on July 25, 2025, due to MSME and vehicle loan asset stress despite strong Q1 profit and revenue growth.

Macro Data	
Brent Crude	\$69.18 (▲ 0.00)
Gold	₹98,280.00 (▼ -0.70)
Silver	₹113,400.00 (▼ -1.76)
Dollar Index	97.38 (▼ -0.13)
INR/USD	86.42 (▲ 0.00)
India 10Y Bond Yield	6.3 (▲ 0.00)
US 10Y Bond Yield	4.4 (▲ 0.00)

Indian Market	
BSE Sensex	81,463.09 (▼ -0.88)
NIFTY 50	24,837.00 (▼ -0.90)
BSE SENSEX 50	25,945.27 (▼ -0.89)
NIFTY NEXT 50	67,146.65 (▼ -1.56)
BSE SENSEX Next 50	83,081.99 (▼ -1.31)
NIFTY BANK	56,528.90 (▼ -0.94)
BSE BANKEX	63,043.13 (▼ -0.78)
NIFTY FINANCIAL SERVICES	26,808.00 (▼ -0.88)
BSE FINANCIAL SERVICES	12,674.58 (▼ -1.13)
NIFTY MIDCAP SELECT	12,925.90 (▼ -1.39)
BSE MIDCAP	45,978.04 (▼ -1.46)
INDIA VIX	11.28 (▲ 5.22)

- Parliament's PAC criticized CMPFO and the Coal Ministry for investing provident funds in DHFL debentures despite red flags, causing an avoidable ₹315 crore loss; a forensic audit recommended.
- Tata Group invested ₹1 trillion in five years, focusing on semiconductors, digital services, manufacturing, doubling revenue and increasing profits 3.6 times, preparing for future growth.
- Cipla's Q1 FY26 net profit grew 10% to ₹1,298 crore, driven by consumer health, generics sales, strategic launches, strong markets and a consistent EBITDA margin of 25.6%.

Geopolitical Updates:

- Donald Trump visited the Federal Reserve, urged lower interest rates, criticized expenses, but avoided firing Powell—offering temporary relief amid Fed rate decision tensions.
- Thailand prefers bilateral talks to resolve the Cambodia border conflict, rejecting third-party mediation despite escalated clashes, heavy casualties, displacement and regional offers to mediate.
- France announced it will recognize Palestine as a state at the UN General Assembly in September 2025, aiming to promote peace amid the Gaza crisis, despite opposition from Israel and the US.
- Iran and European powers held serious, detailed nuclear talks in Istanbul, exchanging proposals on inspections and sanctions relief; discussions continue amid looming UN sanctions expiry in October 2025.
- US-EU trade deal faces uncertainty with a 50/50 chance before August 1 tariff deadline; talks continue amid steel tariff disputes and possible \$109 billion EU retaliation.
- India extended a ₹4,850 crore Line of Credit to Maldives for infrastructure, signed MoUs on trade, defense and digital projects and strengthened bilateral ties during PM Modi's visit.

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