

## 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)	-947.77
FII (Index Options)	-2,441.30
FII (Stock Options)	573.02

Global Market Snapshot	
Dow Jones	44,901.92 (▲ 0.47)
S&P 500	6,363.35 (▲ 0.00)
Nasdaq	21,057.96 (▲ 0.00)
Gift Nifty	24,842.00 (▲ 0.00)
Nikkei 225	41,456.23 (▼ -0.88)
Hang Seng	25,388.35 (▼ -1.09)

- Lenskart shareholders approved a ₹2,150 crore (~\$250 million) IPO at its July 26, 2025 AGM. A Draft RHP filing is imminent. ESOP 2025 and structured founder payout also cleared.
- Aaradhya Disposal Industries plans ₹20 crore SME IPO on NSE Emerge to fund expansion, working capital, debt repayment; exports eco-friendly paper products to 16 countries.
- FlySBS Aviation Limited plans an SME IPO on NSE Emerge (Aug 1–5, 2025), aiming to raise ₹125 crores to expand its private-jet fleet and operations.
- Knowledge Realty Trust (KRT), backed by Blackstone and Sattva, received SEBI approval to raise ₹4,800 cr via REIT IPO in early August 2025 to reduce debt and monetize 30 Grade A office assets.
- Jyoti Global Plast IPO specializes in plastic molding for packaging, automotive parts, toys and drones; IPO opens on August 4, 2025.
- Parth Electricals IPO opens August 4-6, 2025; allotment August 7; listing on NSE SME August 11. 2025 revenue ₹176.20 crore, profit ₹10.12 crore.
- The grey market for IPOs in India shows strong premiums of 8-44% ahead of the busy 2025 IPO rush, reflecting robust investor demand and positive listing sentiment.

## P.E. & Funding Updates:

- Adar Poonawalla infused ₹1,500 crore into Poonawalla Fincorp via preferential allotment to promoter Rising Sun Holdings, reinforcing strategic capital for NBFC growth.
- MediBuddy is pursuing strategic acquisitions—including in women's health, mental health, chronic disease and maternity—to broaden offerings, while raising fresh equity and debt funding to support expansion.

Macro Data	
Brent Crude	\$68.44 (▼ -1.07)
Gold	₹98,490.00 (▲ 0.21)
Silver	₹113,320.00 (▼ -0.07)
Dollar Index	97.65 (▲ 0.28)
INR/USD	86.53 (▲ 0.13)
India 10Y Bond Yield	6.33 (▲ 0.48)
US 10Y Bond Yield	4.39 (▼ -0.23)

Indian Market	
BSE Sensex	81,463.09 (▲ 0.00)
NIFTY 50	24,837.00 (▲ 0.00)
BSE SENSEX 50	25,945.27 (▲ 0.00)
NIFTY NEXT 50	67,146.65 (▲ 0.00)
BSE SENSEX Next 50	83,081.99 (▲ 0.00)
NIFTY BANK	56,528.90 (▲ 0.00)
BSE BANKEX	63,043.13 (▲ 0.00)
NIFTY FINANCIAL SERVICES	26,808.00 (▲ 0.00)
BSE FINANCIAL SERVICES	12,674.58 (▲ 0.00)
NIFTY MIDCAP SELECT	12,925.90 (▲ 0.00)
BSE MIDCAP	45,978.04 (▲ 0.00)
INDIA VIX	11.28 (▲ 0.00)

- Ammunic Systems raised \$1.1 million in seed funding to develop indigenous electronic fuzes and munitions, boosting India's defence-tech capabilities and supporting domestic manufacturing and self-reliance.
- Ohm Mobility, an EV financing startup, shut down after five years due to unsustainable growth despite pivots and investor support, reflecting broader startup closures in India.
- Veranda Learning raised Rs 357 crore via Qualified Institutional Placement to reduce debt and invest in growth. Major investors included Authum Investment and Singapore-based Necta Bloom VCC.
- Private equity and venture capital deal values in India dropped 54% to \$215 million last week, with no significant large transactions reported.

## Business & Economic Updates:

- RBI extends IndusInd Bank oversight panel tenure by one month to August 28, 2025, or until a new MD & CEO appointment, managing operations amid transition.
- A focus on the chemistry, leather and electronics sectors emerges amid an FDI slump in India, as inflows shift to boost manufacturing and attract strategic investments in 2025.
- The Department of Telecom issued a Rs 7,800 crore demand notice to Tata Communications for AGR dues from FY 2005-06 to FY 2023-24; legal appeals are currently ongoing.
- Pension funds and global private equity players remain cautious in private credit, wary of small deal sizes and risks despite the sector's growth and opportunities in 2025.
- Eldercare startups in India, including Samarth and Emoha, grow rapidly amid a booming silver economy driven by a projected 347 million seniors by 2050, offering diverse care services.
- India's private sector investment lags public expenditure growth despite Rs 54 lakh crore capex in 11 years. The government seeks private participation amid an economic slowdown.

- The Indian government targets critical sectors like BFSI, manufacturing, civil aviation, telecom and defence to boost FDI in 2025, easing regulations and raising limits.

## Geopolitical Updates:

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- India and China held candid talks focusing on border peace, Kashmir pilgrimage resumption, direct flights, trans-border river cooperation and preparing for the 24th Special Representatives meeting in 2025.
- The Thailand-Cambodia border clashes have killed over 35 people, including soldiers and civilians. More than 200,000 people have been evacuated amid ongoing artillery, ground fighting and ceasefire negotiations.
- The US-EU trade deal imposes a 15% tariff on EU exports, includes significant EU energy and investment commitments and depends on Trump's approval before the August 1 deadline.
- Israel has slightly eased Gaza aid restrictions by increasing food trucks, restoring water plant power and allowing brief cessations in fighting, yet humanitarian aid remains insufficient.
- The EU supports Greece's 2025 wildfire response with 490+ firefighters, planes, helicopters, satellite mapping and coordination under the Civil Protection Mechanism amid extreme heat.
- India joins a three-day UN meeting to promote a two-state solution for Palestine-Israel peace, emphasizing dialogue, security and humanitarian aid despite key absences.
- The US and China resumed tariff talks in Stockholm on July 28, 2025, aiming to extend the truce, prevent new tariffs and stabilize trade amid ongoing tensions.

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