

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-4,636.60
DII (Cash)	6,146.82
FII (Index Futures)	-1,117.29
FII (Stock Futures)	3207
FII (Index Options)	1,850.62
FII (Stock Options)	367.33

- Lenskart filed IPO papers with SEBI, aiming to raise ₹2,150 crore in primary capital; the full IPO size may reach ₹7,500–8,000 crore.
- Essex Marine, a Kolkata-based seafood exporter, launched IPO from August 4-6, raising ₹23 crore to expand processing capacity and develop ready-to-cook products.
- NSDL's ₹4,011 crore IPO opens July 30 at ₹760–₹800 per share. Entirely an Offer For Sale, analysts suggest subscribing for long-term growth, despite key risks.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	44,632.99 (▼ -0.46)
S&P 500	6,389.77 (▲ 0.02)
Nasdaq	21,178.58 (▲ 0.33)
Gift Nifty	24,839.00 (▲ 0.53)
Nikkei 225	40,674.55 (▼ -0.79)
Hang Seng	25,524.45 (▼ -0.15)

- Lenskart, preparing for its IPO, will acquire Spain's Stello Ventures for ₹406 crore to expand its European presence and appeal to young consumers.
- Stellaris Venture Partners led a \$2.7 million seed round for Drizz, supporting its AI-powered, no-code mobile app testing and automation platform.
- Family Space raised \$1.5 million across pre-seed and seed rounds, boosting resources for innovative fintech solutions and expansion in the competitive startup market.
- Passport Trips secured \$500,000 in funding to develop its travel platform aimed at simplifying planning and booking seamless international travel experiences for users.
- Zepto completed a secondary share sale with Elcid, pegging its valuation at \$6 billion. This cements Zepto's status in India's startup ecosystem.
- Sharpsell.ai raised ₹30 crore, including ₹10 crore from Equentis Angel Fund, to enhance its AI sales enablement platform and expand to Southeast Asia and MENA.

## Business & Economic Updates:

- IMF revised India's GDP growth forecast to 6.4% for 2025-2026, reflecting strong domestic demand and a positive global economic outlook for India.

### Macro Data

Brent Crude	\$72.51	(▲ 3.53)
Gold	₹98,860.00	(▲ 0.60)
Silver	₹114,180.00	(▲ 0.51)
Dollar Index	98.93	(▲ 0.27)
INR/USD	86.82	(▲ 0.17)
India 10Y Bond Yield	6.33	(▲ 0.00)
US 10Y Bond Yield	4.33	(▼ -2.04)

### Indian Market

BSE Sensex	81,337.95	(▲ 0.55)
NIFTY 50	24,821.10	(▲ 0.57)
BSE SENSEX 50	25,930.63	(▲ 0.59)
NIFTY NEXT 50	67,379.20	(▲ 0.91)
BSE SENSEX Next 50	83,339.24	(▲ 0.83)
NIFTY BANK	56,222.00	(▲ 0.24)
BSE BANKEX	62,270.90	(▲ 0.12)
NIFTY FINANCIAL SERVICES	26,700.70	(▲ 0.32)
BSE FINANCIAL SERVICES	12,613.28	(▲ 0.37)
NIFTY MIDCAP SELECT	13,033.70	(▲ 1.04)
BSE MIDCAP	46,025.73	(▲ 0.84)
INDIA VIX	11.52	(▼ -4.48)

- Insolvency proceedings begin against BluSmart Mobility after it defaulted on ₹1.28 crore. NCLT imposed a moratorium and a resolution professional will oversee debt resolution.
- SEBI relaxed NRI rules in derivatives markets, scrapping the mandatory CP code and allowing easier, more direct participation of NRIs in Indian derivatives trading.
- RBI capped lenders' exposure to Alternative Investment Funds at 10% of the corpus, aiming to mitigate excessive risk and strengthen financial system stability.
- Reliance jumped to 88th on the Fortune Global 500 list, upholding its position as one of India's and the world's most powerful conglomerates.
- AIIB pledged to double private sector lending by 2030, focusing on sustainable projects and enhancing support for growth in emerging and developing economies.
- Shailesh Jejurikar became the first Indian CEO at Procter & Gamble; his elevation marks a significant step for Indian representation in global leadership.

## Geopolitical Updates:

- Russian airstrikes killed at least 27 Ukrainian civilians, targeting a prison and civilian buildings, injuring dozens. Zelenskyy called the attacks deliberate; Russia claims peace intentions.
- India-US mini trade deal remains stuck. Without an agreement, Indian exports, such as steel, may face tariff hikes. Further negotiations are expected for a breakthrough.
- The US and China resumed tariff negotiations in Stockholm, aiming to prevent new tariff hikes and stabilize trade relations amid ongoing global economic tensions.

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