

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-850.04
DII (Cash)	1,829.11
FII (Index Futures)	-445.40
FII (Stock Futures)	-197.26
FII (Index Options)	-14,777.20
FII (Stock Options)	-948.58

- NSDL IPO booked 1.78x on Day 1. Retail and NII portions fully subscribed; GMP at ₹126 signals 16% listing premium. Issue closes August 1.
- Shanti Gold International IPO booked 77.73 times on Day 3. Retail subscribed 27.25x, NII 150.17x. Listing on August 1. Price band ₹189-₹199.
- Mukesh Ambani's Reliance plans India's biggest IPO, aiming to raise ₹52,200 crore by listing a 5% Jio stake. SEBI float exemption sought.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	44,461.28 (▼ -0.38)
S&P 500	6,370.86 (▼ -0.30)
Nasdaq	21,098.29 (▼ -0.38)
Gift Nifty	24,854.00 (▲ 0.06)
Nikkei 225	40,654.70 (▼ -0.05)
Hang Seng	25,176.93 (▼ -1.36)

- Littlebox, a Gen Z-focused D2C fashion brand, secured ₹17.5 crore in seed funding led by Huddle Ventures and Prath Ventures to boost its tech stack.
- Noida-based DesignX raised \$2million in a pre-Series A round led by Rockstud Capital to expand its digital factory OS and AI capabilities.
- Flexprice, an open-source billing platform for AI companies, raised \$500,000 in pre-seed funding led by TDV Partners. It enables scalable, flexible, usage-based pricing models.
- AI-based edtech startup SpeakX (formerly Yellow Class) raised \$11 million in Pre-Series B round from Elevation Capital, WestBridge Capital and others.
- Wah! Puchka Wah! Litti raised ₹2 crore from Wow! Momo's Sagar Daryani and others to expand Kolkata outlets, aiming for 100 stores in 6 metros within 2 years.

## Business & Economic Updates:

- Promoters will infuse ₹15,825 crore in Jio Financial Services to strengthen the balance sheet.
- Google commits \$6 billion to set up Asia's largest data center in Andhra Pradesh's Visakhapatnam.
- NASA-ISRO's NISAR, the world's costliest Earth observation satellite (\$1.5 billion), launches from Sriharikota.
- NSE crossed 230 million investor trading accounts in July, with Maharashtra leading by share.
- Small city companies have raised ₹3,120 crore in 2025, nearly 15% of total funding, up from 4.2% in 2021.
- Small business loans are causing stress for NBFCs due to higher risks and credit issues.

## Geopolitical Updates:

- Trump imposes a 25% tariff plus a penalty on Indian imports, sparking tension in US-India trade relations.
- Brussels agreed to a 15% tariff on most EU exports to the US, dodging harsher Trump tariffs. In return, the EU pledges huge US energy and defense purchases, despite criticism from European leaders over an unbalanced deal favoring America.

Macro Data	
Brent Crude	\$72.47 (▼ -0.06)
Gold	₹98,820.00 (▼ -0.04)
Silver	₹112,010.00 (▼ -1.90)
Dollar Index	99.95 (▲ +1.03)
INR/USD	87.44 (▲ +0.71)
India 10Y Bond Yield	6.33 (▲ +0.00)
US 10Y Bond Yield	4.38 (▲ +1.15)

Indian Market	
BSE Sensex	81,481.86 (▲ +0.18)
NIFTY 50	24,855.05 (▲ +0.14)
BSE SENSEX 50	25,961.85 (▲ +0.12)
NIFTY NEXT 50	67,435.15 (▲ +0.08)
BSE SENSEX Next 50	83,398.80 (▲ +0.07)
NIFTY BANK	56,150.70 (▼ -0.13)
BSE BANKEX	62,230.47 (▼ -0.06)
NIFTY FINANCIAL SERVICES	26,703.50 (▲ +0.01)
BSE FINANCIAL SERVICES	12,605.47 (▼ -0.06)
NIFTY MIDCAP SELECT	13,009.65 (▼ -0.18)
BSE MIDCAP	46,102.35 (▲ +0.17)
INDIA VIX	11.2 (▼ -2.78)

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