

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,366.40
DII (Cash)	3,186.86
FII (Index Futures)	-3,820.69
FII (Stock Futures)	-1836.03
FII (Index Options)	-3,593.69
FII (Stock Options)	42.15

- Dehydrated-vegetable maker Sawaliya Food Products' IPO opens August 7–11 on NSE EMERGE. Issue size ₹33–34 crore, price band ₹114–120. Listing expected by August 14.
- NSDL IPO, priced ₹760–₹800/share, subscribed over 8 times by August 1, 2025. Strong non-institutional (20.75x) and retail (5.71x) investor participation. Listing on August 6.

P.E. & Funding Updates:

- Bhindi.io raised \$4 million in a pre-seed round led by Cyber Fund to expand its AI agent platform, automating tasks and reducing AI fatigue globally.
- ILine.ai raised \$500K in an angel round to expand EV-based low-emission logistics across 12 Indian cities, enhancing AI dispatch and aiming for net-zero emissions by 2028.
- Arivihan raised \$4.17M in pre-Series A from Prosus, Accel to expand AI-powered personalized learning for students in tier II cities and rural India.
- Bengaluru AI startup Metaforms raised \$9 million led by Peak XV Partners to expand its AI-driven market research automation platform and grow engineering, R&D teams.

Global Market Snapshot	
Dow Jones	44,130.98 (▲ 0.00)
S&P 500	6,339.39 (▼ -0.37)
Nasdaq	21,122.45 (▼ -0.03)
Gift Nifty	24,599.00 (▼ -0.96)
Nikkei 225	41,069.82 (▲ 0.00)
Hang Seng	24,773.33 (▲ 0.00)

Business & Economic Updates:

- India's net GST revenue for July 2025 rose 1.7% year-on-year to ₹1.68 trillion, with refunds surging, marking the slowest pace of growth since February.
- Indian banks may adopt a risk-averse stance and slow lending to export-oriented MSMEs due to growing global trade uncertainties and higher exposure risks.
- India's manufacturing sector PMI hit a 16-month high at 59.1 in July 2025, driven by output growth, strong new orders and robust domestic demand despite inflation concerns.

Macro Data	
Brent Crude	\$71.81 (▲ 0.00)
Gold	₹99,800.00 (▲ 1.37)
Silver	₹110,550.00 (▲ 0.59)
Dollar Index	99.97 (▼ -0.10)
INR/USD	87.61 (▲ 0.00)
India 10Y Bond Yield	6.33 (▲ 0.00)
US 10Y Bond Yield	4.38 (▲ 0.00)

Indian Market	
BSE Sensex	80,599.91 (▼ -0.72)
NIFTY 50	24,565.35 (▼ -0.82)
BSE SENSEX 50	25,663.63 (▼ -0.84)
NIFTY NEXT 50	66,192.80 (▼ -1.35)
BSE SENSEX Next 50	81,866.78 (▼ -1.09)
NIFTY BANK	55,617.60 (▼ -0.62)
BSE BANKEX	61,806.01 (▼ -0.47)
NIFTY FINANCIAL SERVICES	26,492.50 (▼ -0.59)
BSE FINANCIAL SERVICES	12,452.48 (▼ -0.91)
NIFTY MIDCAP SELECT	12,668.25 (▼ -1.55)
BSE MIDCAP	45,155.19 (▼ -1.37)
INDIA VIX	11.98 (▲ 3.81)

- SEBI plans to expand strategic investors in REITs and InvITs by including QIBs and foreign institutional investors, excluding individuals, corporates and family offices. Feedback sought.
- The National Stock Exchange settled with SEBI for Rs 40.35 crore over the indirect sharing of unpublished price-sensitive data. Settlement ends proceedings without admitting guilt.
- UPI transactions hit a record 19.47 billion in July 2025, ₹25.08 lakh crore value, driven by nanopreneurs, retailers; NPCI limited balance checks to 50 daily.
- US-based trading firm Jane Street is uncooperative in India's Income Tax probe; key data outside India and limited local staff hinder the investigation despite an escrow deposit.

Geopolitical Updates:

- Former USTR official Mark Linscott says renewed Trump-Modi talks are essential to revive stalled U.S.-India trade negotiations and achieve a meaningful bilateral trade agreement soon.
- Syria faces the highest U.S. tariff at 41%, while Laos and Myanmar each endure 40%—among the steepest levies under Trump's new global tariff regime targeting dozens of countries. Tariffs take effect August 7.
- Trump deployed U.S. nuclear submarines near Russia after Medvedev's "Dead Hand" threat, escalating tensions and signaling a strong response to Russia's nuclear posturing and warnings.

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