

## 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

- Complex Cinemas develops and operates screens across Indian cities, specializing in film exhibition, events and F&B sales. IPO opens 7–11 August at ₹168–177.
- ANB Metal Cast's IPO opens August 8. FY25 saw 45% revenue growth, with ₹10.25cr profit, reflecting strong MSME sector momentum and robust investor interest.
- Arcil's investors will divest 32.57% in the company through an upcoming IPO, reflecting growing investor appetite in the stressed asset management sector.
- JSW Cement cut its IPO size to ₹3,600 crore. The issue, opening August 7, includes fresh shares worth ₹1,600 crore and ₹2,000 crore offer for sale.
- All Time Plastics' ₹400.6 crore IPO (price band ₹260–275/share) opens August 7, 2025. Offer includes fresh issue, OFS; listing scheduled August 14.

Global Market Snapshot	
Dow Jones	43,588.58 (▼ -1.23)
S&P 500	6,339.39 (▲ 0.00)
Nasdaq	21,122.45 (▲ 0.00)
Gift Nifty	24,599.00 (▲ 0.00)
Nikkei 225	40,799.60 (▼ -0.66)
Hang Seng	24,507.81 (▼ -1.07)

## P.E. & Funding Updates:

- Between July 28 and August 2, 2025, 21 Indian startups across sectors like biotech, AI, gaming and cybersecurity raised over \$129 million in funding.
- SAFE Security, led by Saket Modi, raised \$70 million in Series C funding to advance its AI-powered, autonomous cyber risk and threat exposure management platform.

## Business & Economic Updates:

- Japanese VCs, seeking better returns than Southeast Asia, are turning to Indian startups for investments, driving synergies in AI, fintech and EV sectors.
- Tata Motors' \$4.4B acquisition of Italy's Iveco Group boosts India's M&A numbers, even as broader startup funding slows due to cautious investor sentiment.

### Macro Data

Brent Crude	\$69.67	(▼ -2.98)
Gold	₹100,350.00	(▲ 0.55)
Silver	₹111,490.00	(▲ 0.85)
Dollar Index	99.14	(▼ -0.83)
INR/USD	87.55	(▼ -0.07)
India 10Y Bond Yield	6.38	(▲ 0.79)
US 10Y Bond Yield	4.23	(▼ -3.42)

### Indian Market

BSE Sensex	80,599.91	(▲ 0.00)
NIFTY 50	24,565.35	(▲ 0.00)
BSE SENSEX 50	25,663.63	(▲ 0.00)
NIFTY NEXT 50	66,192.80	(▲ 0.00)
BSE SENSEX Next 50	81,866.78	(▲ 0.00)
NIFTY BANK	55,617.60	(▲ 0.00)
BSE BANKEX	61,806.01	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,492.50	(▲ 0.00)
BSE FINANCIAL SERVICES	12,452.48	(▲ 0.00)
NIFTY MIDCAP SELECT	12,668.25	(▲ 0.00)
BSE MIDCAP	45,155.19	(▲ 0.00)
INDIA VIX	11.98	(▲ 0.00)

- FPIs invested \$1.7 billion (₹14,247 crore) in Indian IPOs in July 2025, amid record primary market activity, despite global uncertainties impacting secondary flows.
- The RBI's \$5B forex swap matures today, set to drain approximately ₹ 43,000 crore from the banking system, impacting short-term liquidity conditions for Indian banks.
- India unveils a ₹5,000cr rare earth policy, incentivizing domestic production, reducing China-import dependence and boosting clean energy supply chains.
- RBI's MPC, meeting August 4-6, is widely expected to hold the repo rate at 5.5%, after three cuts. Economists predict a "status quo" stance.
- Domestic Institutional Investors continue dominating the Indian stock markets, providing stability and offsetting FPI volatility amid global economic uncertainties.

## Geopolitical Updates:

- Pakistan and Iran agreed to boost annual bilateral trade to \$8 billion, focusing on energy, logistics and agriculture, aiming to deepen regional economic ties.
- NSA Ajit Doval will visit Moscow early August and EAM S Jaishankar mid-August to discuss defense ties, Arctic cooperation and boosting India-Russia trade.

INDIA IPO<sup>TM</sup>

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