

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-22.48
DII (Cash)	3,840.39
FII (Index Futures)	-2,249.16
FII (Stock Futures)	6,828.29
FII (Index Options)	-3,273.62
FII (Stock Options)	302.67

Global Market Snapshot	
Dow Jones	44,111.74 (▼ -0.14)
S&P 500	6,329.94 (▲ 1.47)
Nasdaq	21,053.58 (▲ 1.95)
Gift Nifty	24,740 (▼ -0.18)
Nikkei 225	40,549.54 (▲ 0.64)
Hang Seng	24,902.53 (▲ 0.68)

- In 2025, India's IPO market is dominated by industrials and consumer discretionary sectors, surpassing financial services and IT in deal count, reflecting changing sectoral trends.
- Mahendra Realtors & Infrastructure IPO issue size is up to 58,17,600 equity shares, comprising fresh shares and offer-for-sale shares.
- BlueStone cut its IPO size to Rs 820 crore, will launch August 11 at Rs 7,800 crore valuation; offer-for-sale reduced to 13.9 million shares.
- Icodex Publishing is launching its IPO in August 2025, aiming to get listed on the BSE SME platform. The company has shown steady revenue and profit growth.
- Sanjeev Bikhchandani stresses unicorns must be profitable at IPO or within 2-3 years after, highlighting investor preference for sustainable, profit-driven business models.
- Tata Capital IPO plans ₹17,200 crore issue, including fresh shares and Tata Sons' 23 crore share sale; aims to strengthen capital with strong FY25 financials.
- Bagmane Developers plans a ₹4,000-5,000 crore REIT IPO in late 2025, focusing on Bengaluru and Delhi office parks, debt repayment and leveraging strong real estate demand.

## P.E. & Funding Updates:

- The Sleep Company raised Rs 480 crore in funding led by ChrysCapital, plans expanding retail stores to 290-310; FY24 revenue grew 2.5x, achieving recent EBITDA profitability.
- Gladful, a nutrition-focused D2C brand, raised \$326K in seed rounds, led by prominent investors, aiming to expand high-protein product reach online and offline in India.
- DPDzero, Bengaluru-based fintech, raised \$7 million led by GMO Venture Partners; it focuses on AI-powered ethical debt collection, expanding field agents and geographic reach.
- Terafac raised Rs 6.5 crore pre-seed funding to expand AI-robotics, automating welding and other industrial tasks via its AI-Vision platform and SaaS model.

Macro Data	
Brent Crude	\$67.64 (▼ -1.63)
Gold	₹101,190.00 (▲ 0.08)
Silver	₹113,830.00 (▲ 1.14)
Dollar Index	98.74 (▼ 0.00)
INR/USD	87.81 (▲ 0.16)
India 10Y Bond Yield	6.38 (▲ 0.00)
US 10Y Bond Yield	4.22 (▼ 0.48)

Indian Market	
BSE Sensex	80,710.25 (▼ -0.38)
NIFTY 50	24,649.55 (▲ -0.30)
BSE SENSEX 50	25,743.91 (▲ -0.31)
NIFTY NEXT 50	66,762.05 (▲ -0.23)
BSE SENSEX Next 50	82,489.59 (▲ -0.39)
NIFTY BANK	55,360.25 (▲ -0.47)
BSE BANKEX	61,620.46 (▲ -0.28)
NIFTY FINANCIAL SERVICES	26,373.50 (▲ -0.39)
BSE FINANCIAL SERVICES	12,439.18 (▲ -0.42)
NIFTY MIDCAP SELECT	12,761.05 (▲ -0.78)
BSE MIDCAP	45,596.16 (▲ -0.14)
INDIA VIX	11.71 (▼ -2.17)

- Tryo raised Rs 3 crore pre-seed funding led by Zerpearl VC to expand Bengaluru operations, enhance tech and offer “Try First, Pay Later” with fast delivery and home trials.
- EON Space Labs raised \$1.2 million in pre-Series A funding to scale AI-driven electro-optical and infrared imaging tech for satellites, drones and ground surveillance platforms.
- GameRamp raised \$5.4 million in pre-seed funding led by BITKRAFT Ventures to expand AI-powered publishing tools, launching services Sentinel and Grow for mobile game monetization and financing.
- Fraganote raised \$1 million in pre-Series A funding led by Rukam Capital to expand its fragrance portfolio, launch offline retail pilots and create immersive brand experiences.
- Chanakya Opportunities Fund I led Rs 20 crore pre-IPO investment in Polite Powertech, supporting turnkey EPC projects in transmission lines, solar power and sustainable infrastructure upgrades.

## Business & Economic Updates:

- RBI removes prior approval for banks to open Special Rupee Vostro Accounts, enabling faster INR-based cross-border trade settlement and promoting the rupee’s international usage.
- The Defence Acquisition Council approved Rs 67,000 crore projects on August 5, 2025, enhancing the Indian Armed Forces’ surveillance, combat, air defence and fleet maintenance capabilities.
- ChrysCapital received CCI approval to acquire 90% stake in Theobroma for Rs 2,410 crore, aiming to expand the bakery chain’s presence across cities.
- NARCL offered ₹550 crore for Jaypee Cement and Salem-Ulundurpet toll road distressed assets, using a 15:85 cash to security receipts structure with sovereign guarantees.
- India's Services PMI reached an 11-month high of 60.5 in July 2025, driven by strong export demand, rising orders, price increases, but slower hiring and capacity strains.

- Robust economic growth driven by strong export demand, Rs 67,000 crore defense project approvals, RBI's trade settlement easing, significant fintech funding and shifting real estate market trends.

## Geopolitical Updates:

- US President Trump threatened steep tariff hikes on Indian imports over Russian oil purchases, accusing India of a poor trade partnership and risking U.S.-India economic ties.
- US President Trump plans to escalate pharmaceutical tariffs, starting small, possibly 150% within 18 months, eventually 250%, to boost domestic manufacturing and disrupt pharma supply chains.
- US President Donald Trump said he will meet China's President Xi Jinping if a trade deal is reached, linking the summit to successful trade negotiations between the two nations.
- India and the Philippines formed a Strategic Partnership, enhancing defense ties with joint naval exercises, BrahMos missile deals, maritime security and cooperation to counter China's regional influence.
- Israeli PM Netanyahu plans a full Gaza military takeover to defeat Hamas, secure hostages, amid security, political opposition, a faltering ceasefire and a worsening humanitarian crisis.

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