

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-4,999.10
DII (Cash)	6,794.28
FII (Index Futures)	341.76
FII (Stock Futures)	9,415.98
FII (Index Options)	-1397.93
FII (Stock Options)	-175.14

- Regaal Resources is coming up with an IPO of approximately ₹300–306 crore, including a fresh issue of ₹210 crore and an offer for sale of 94,12,000 shares.
- Prestige Hospitality Ventures received SEBI approval for a ₹2,700 crore IPO, comprising a ₹1,700 crore fresh issue and ₹1,000 crore offer for sale by promoters.
- SEBI approved IPOs for Epack Prefab, SSF Plastics, Gujarat Kidney and Anand Rathi, enabling them to launch public issues with mixed fresh and OFS components.
- Sify Infinit Spaces plans a \$500 million IPO to expand data centers amid rising AI demand, backed by major banks and targeting tier-II city growth in India.
- NSDL's \$464 million IPO, oversubscribed 41 times, highlights strong investor confidence in its dominant securities depository role and India's capital market infrastructure.

Global Market Snapshot	
Dow Jones	44,193.12 (▲ 0.18)
S&P 500	6,299.19 (▼ -0.49)
Nasdaq	20,916.55 (▼ -0.65)
Gift Nifty	24,537.00 (▼ -0.82)
Nikkei 225	40,794.86 (▲ 0.60)
Hang Seng	24,910.63 (▲ 0.03)

P.E. & Funding Updates:

- Outzidr raised \$3.1 million pre-Series A funding led by RTP Global, plans offline stores by 2026, enhancing trendy Gen Z fashion with fast delivery and design.
- Cautio raised \$3 million in seed funding led by Amal Parikh to enhance AI-powered video telematics, expand operations and improve fleet safety across India's transport sectors.
- HYLENR raised \$3 million pre-Series A to commercialize scalable, carbon-free LENR systems for industrial heat and power, targeting global expansion and fossil fuel disruption.
- CodeKarma raised \$2.5 million in pre-seed funding led by Prosus, Accel and Xeed Ventures to enhance AI-driven software productivity, scale operations and expand into new enterprise markets.
- SuperGaming raised \$15 million in Series B led by Skycatcher and Steadview at a \$100 million valuation to launch Indus globally and expand cloud gaming with Web3.

Macro Data	
Brent Crude	\$66.89 (▼ -1.11)
Gold	₹101,620.00 (▲ 0.42)
Silver	₹114,650.00 (▲ 0.72)
Dollar Index	98.23 (▼ -0.52)
INR/USD	87.74 (▼ -0.08)
India 10Y Bond Yield	6.38 (▲ 0.00)
US 10Y Bond Yield	4.23 (▲ 0.24)

Indian Market	
BSE Sensex	80,543.99 (▼ -0.21)
NIFTY 50	24,574.20 (▼ -0.31)
BSE SENSEX 50	25,671.84 (▼ -0.28)
NIFTY NEXT 50	66,181.35 (▼ -0.87)
BSE SENSEX Next 50	81,802.68 (▼ -0.83)
NIFTY BANK	55,411.15 (▲ 0.09)
BSE BANKEX	61,684.31 (▲ 0.10)
NIFTY FINANCIAL SERVICES	26,371.15 (▼ -0.01)
BSE FINANCIAL SERVICES	12,422.89 (▼ -0.13)
NIFTY MIDCAP SELECT	12,636.40 (▼ -0.98)
BSE MIDCAP	45,142.02 (▼ -1.00)
INDIA VIX	11.96 (▲ 2.13)

- Xovian Aerospace raised \$2.5 million pre-seed to build AI-powered RF satellites, enhancing space communication and sensing, targeting advanced data acquisition and space trials.
- Biome venture studio raised ₹100 crore, committing funds and operational support over three years to co-found and scale startups, focusing on AI and fintech ventures.
- Mumbai-based digital lending startup Zype raised ₹90 crore led by Unleash Capital, offering unsecured loans, broke even in Q4 FY25, aiming for profitable growth and expansion.
- Gladful, raised ₹8 crore led by Eternal Capital, offers clean-label, plant-based kids' breakfast mixes. Funds to support the team, R&D and expand into tier I and II cities.

Business & Economic Updates:

- RBI's MPC kept the repo rate at 5.5% in August 2025, citing global uncertainties, moderate inflation and stable growth, maintaining a neutral policy stance.
- MCA plans to ease MSME compliance amid US tariffs, simplifying certification and amending laws to protect domestic enterprises and exporters from trade-related challenges.
- Hero FinCorp halted unsecured loans over borrower risks, focusing on secured lending. It aims for 14% disbursement growth in FY26 by enhancing credit underwriting and recalibrating its portfolio.
- NCDEX got SEBI's in-principle approval to launch equity and derivatives segments, must maintain commodity volumes, meet IT deadlines and plans ₹750 crore fundraising.
- Antfin Singapore plans to sell its entire 1.95% Eternal stake (₹5,370 crore) via a block deal at a ₹285 floor price, exiting its investment in the company.
- India-US agricultural trade surged in early 2025, with India importing \$1.69 billion of US farm products (49.1% increase) and boosting exports, despite ongoing trade talks challenges.

- India Inc's capacity utilisation dropped to 74% in Q1FY25 from 76.8%, reflecting weak consumption, high inventories, muted capex, amid heat waves and election impacts.
- RBI's MPC kept the repo rate at 5.5% in August 2025, maintaining a neutral stance with a 3.1% inflation forecast and 6.5% GDP growth amid global uncertainties.

Geopolitical Updates:

- Trump imposed an additional 25% tariff on Indian goods over Russian oil imports, doubling total tariffs to 50%, escalating trade tensions and impacting key Indian exports.
- US envoy Steve Witkoff's August 2025 Moscow talks with Putin were constructive, discussing Ukraine peace prospects amid looming Trump sanctions and tense US-Russia relations.
- Brazil requested WTO consultations against the US's 50% tariffs on its imports, citing WTO violations and seeking a diplomatic resolution amid escalating trade tensions with the US.
- PM Modi to visit China for SCO Summit (Aug 31-Sept 1, 2025), first since the 2020 Galwan clash, aiming to ease tensions and hold bilateral talks.

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