

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,202.65
DII (Cash)	5,972.36
FII (Index Futures)	549.65
FII (Stock Futures)	2408.82
FII (Index Options)	-6,155.00
FII (Stock Options)	312.56

- Mumbai-based power solutions provider Powerica Ltd filed draft IPO papers with SEBI to raise ₹1,400 crore via a public issue, including fresh equity and offer-for-sale shares.
- JSW Cement's ₹3,600 crore IPO subscribed 7.77 times overall, with QIBs oversubscribed 15.8x, NIIs 10.97x, retail investors 1.81x; proceeds for new plant and debt repayment.
- Highway Infrastructure IPO subscribed 300.61 times; shares listed at 67% premium on BSE and 64% on NSE, debuting on August 12, 2025.

Global Market Snapshot	
Dow Jones	43,975.09 (▼ -0.45)
S&P 500	6,389.45 (▲ 0.78)
Nasdaq	21,450.02 (▲ 0.98)
Gift Nifty	24,575.00 (▲ 0.74)
Nikkei 225	41,820.48 (▲ 1.85)
Hang Seng	24,906.81 (▲ 0.19)

P.E. & Funding Updates:

- Healthcare startup Sukion seeks ₹250 crore from Bessemer Venture Partners to expand operations and strengthen innovation in rehabilitation facilities.
- Eyestem secures \$10 million in funding to develop and commercialize retinal cell therapies targeting degenerative eye conditions in India and abroad.
- Ti Men Capital leads a \$9 million pre-series fundraising round for a tech venture, supporting expansion and innovation goals amid growing startup competition.
- Recruitment-tech platform Elevr receives \$1.1 million to boost tech, scale operations and enhance hiring solutions in India's employment market.
- Bengaluru-based deeptech startup Neuralzome Cybernetics raised \$2.4 million in pre-seed funding to advance autonomous robotics and expand operations in North America and Europe.

Business & Economic Updates:

Macro Data		
Brent Crude	\$66.63	(▲ 0.06)
Gold	₹100,400.00	(▼ -0.79)
Silver	₹113,970.00	(▼ -0.60)
Dollar Index	98.49	(▲ 0.32)
INR/USD	87.67	(▲ 0.00)
India 10Y Bond Yield	6.41	(▲ 0.00)
US 10Y Bond Yield	4.29	(▲ 0.70)

Indian Market		
BSE Sensex	80,604.08	(▲ 0.93)
NIFTY 50	24,585.05	(▲ 0.91)
BSE SENSEX 50	25,682.90	(▲ 0.96)
NIFTY NEXT 50	66,283.95	(▲ 1.17)
BSE SENSEX Next 50	82,021.03	(▲ 1.08)
NIFTY BANK	55,510.75	(▲ 0.92)
BSE BANKEX	61,818.29	(▲ 1.13)
NIFTY FINANCIAL SERVICES	26,405.80	(▲ 0.91)
BSE FINANCIAL SERVICES	12,465.45	(▲ 1.00)
NIFTY MIDCAP SELECT	12,610.50	(▲ 0.83)
BSE MIDCAP	44,921.00	(▲ 0.79)
INDIA VIX	12.22	(▲ 1.58)

- BSE raises eligibility for SME to mainboard migration, requiring ₹15 crore operating profit over three years, minimum ₹3 crore net tangible assets, 1,000 public shareholders and minimum liquidity criteria.
- India aims to broaden trade ties with 50 new nations to cushion the impact of adverse US tariff actions on exports.
- SEBI plans measures to drive greater retail investor activity and transparency, supporting India's continued financial market growth trajectory.
- RBI says banks can independently decide savings account minimum balances, promoting flexibility but posing access challenges for low-balance account holders.
- The Reserve Bank of India has reportedly sold \$5 billion in the foreign exchange markets to strengthen the rupee amid heightened volatility and tariff-driven pressure.
- The US imposes a 25% tariff, impacting 55% of Indian exports and prompting concerns over India's trade competitiveness and export sector.
- If India reduces Russian oil imports, analysts warn the annual oil bill could rise by \$5–11 billion due to higher replacement costs.
- With over 2 million added in June, India's demat accounts cross 200 million, reflecting continued enthusiasm for equities among retail investors nationwide.
- July mutual fund SIP inflows hit a record ₹28,464 crore, demonstrating robust retail participation despite equity market volatility.

- Indian businesses are increasing their use of loans against securities, such as shares or mutual funds, to unlock liquidity for working capital, expansion and refinancing.
- The finance ministry proposes credit guarantees of 10–15% for stressed small businesses to shield them from tariff fallout and stimulate lending.
- Banks may restructure or relax terms for MSMEs affected by US tariffs, aiming to ease short-term repayment burdens and operational strains.
- The new Income Tax Bill restores Alternate Minimum Tax relief for LLPs, removing AMT applicability, easing tax burdens and compliance for limited liability partnerships starting next financial year.
- Indian IT firms' valuations hit five-year lows due to foreign investor selloffs, weak earnings, margin pressure and job cuts, signaling cautious optimism for long-term recovery.

Geopolitical Updates:

- Ukrainian President Zelensky appeals to India's Prime Minister Modi to limit Russian oil imports, seeking greater global pressure on Moscow.
- Pakistan halts gas and water utilities for Indian diplomats in Islamabad, escalating diplomatic tensions amid lingering bilateral disputes.
- Germany's Chancellor Merz invited Trump, Zelenskyy, NATO and EU leaders to virtual talks before the Trump-Putin summit, focusing on pressuring Russia, peace negotiations and territorial security issues.

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