

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,398.80
DII (Cash)	3,507.93
FII (Index Futures)	-1,025.08
FII (Stock Futures)	452.49
FII (Index Options)	820.36
FII (Stock Options)	-127.63

## Recent IPO Updates:

- Investors Peak XV, Tiger Global and Y Combinator plan to pare holdings in Groww's IPO, signaling strong interest as the fintech eyes an \$8B valuation.
- Fractal Analytics, India's first AI unicorn, filed for a \$560M IPO, valuing it over \$3.5B. It offers AI solutions globally, with \$370 million in revenue and profit growth in FY25.

## P.E. & Funding Updates:

- Dashverse, an artificial intelligence video startup, raised \$13 million in funding led by Peak XV Partners to fuel expansion and innovation.
- Bengaluru-based Ultraviolette raised \$21 million led by Japan's TDK Ventures to accelerate R&D, scale manufacturing, expand retail from 20 to 100+ cities and boost global reach.
- Elever, a SEBI-registered PMS firm, raised \$1.1 million pre-Series A led by Brand Capital to scale business, boost brand and target ₹1,000 crore AUM in two years.
- Spike AI, an Indian startup building the first autonomous marketing intelligence system, raised \$1.9 million in pre-seed funding led by Sorin Investments to accelerate the MAGI platform rollout.
- Gurugram-based ELIVAAS raised \$10.4 million in Series B led by Vertex Ventures to expand luxury vacation rentals, enhance technology and grow globally from 30 Indian destinations.
- Pronto, India's first real-time household help platform, raised \$11M Series A led by General Catalyst to expand the shift-based model, onboard 10,000 workers and grow across metros.

Global Market Snapshot	
Dow Jones	44,458.61 (▲ 1.10)
S&P 500	6,373.45 (▼ -0.25)
Nasdaq	21,385.40 (▼ -0.30)
Gift Nifty	24,503.00 (▼ -0.29)
Nikkei 225	42,718.17 (▲ 2.15)
Hang Seng	24,969.68 (▲ 0.25)

Macro Data	
Brent Crude	\$66.12 (▼ -0.77)
Gold	₹100,350.00 (▼ -0.05)
Silver	₹114,660.00 (▲ 0.61)
Dollar Index	98.07 (▼ -0.43)
INR/USD	87.72 (▲ 0.06)
India 10Y Bond Yield	6.41 (▲ 0.00)
US 10Y Bond Yield	4.29 (▲ 0.00)

Indian Market	
BSE Sensex	80,397.53 (▼ -0.26)
NIFTY 50	24,487.40 (▼ -0.40)
BSE SENSEX 50	25,658.81 (▼ -0.09)
NIFTY NEXT 50	66,223.90 (▼ -0.09)
BSE SENSEX Next 50	82,261.92 (▲ 0.29)
NIFTY BANK	55,043.70 (▼ -0.84)
BSE BANKEX	61,307.90 (▼ -0.83)
NIFTY FINANCIAL SERVICES	26,135.30 (▼ -1.02)
BSE FINANCIAL SERVICES	12,358.54 (▼ -0.86)
NIFTY MIDCAP SELECT	12,561.60 (▼ -0.39)
BSE MIDCAP	45,013.60 (▲ 0.21)
INDIA VIX	12.23 (▲ 0.08)

- Graas.ai, a Singapore-based AI data-for-commerce startup, raised \$9 million pre-Series B led by Tin Men Capital to expand its autonomous AI agent platform, Agent Foundry, across India and Southeast Asia.

## Business & Economic Updates:

- India's retail inflation has dropped to an eight-year low of 1.6% in July, signaling relief for households and positive sentiment for economic planners.
- The Insolvency and Bankruptcy Code (Amendment) Bill, 2025 was tabled in Lok Sabha, focusing on creditor-initiated and cross-border insolvency processes.
- India's net direct tax collections dropped nearly 4% as of August, driven by higher taxpayer refunds and slower inflows, challenging fiscal targets.
- The Cabinet approved four fresh semiconductor manufacturing projects under the India Semiconductor Mission, boosting domestic capacity with investments totaling about ₹4,600 crore.
- Food inflation in July 2025 stayed negative at -1.76%, led by a sharp decline in prices of pulses, vegetables, cereals and eggs.
- Bengaluru-based Pixxel, in a consortium with Dhruva Space, PierSight and Satsure, will build India's first private commercial satellite constellation under IN-SPACE PPP.
- India's tourism sector aims for a \$3 trillion economy and 10% GDP contribution by 2047, targeting massive job and foreign exchange growth.
- SEBI has marked ₹77,800 crore worth of regulatory dues as "difficult to recover," despite continued enforcement and legal proceedings.

- NSDL's updated rules now require extra documentation and company approval for off-market transfers of unlisted shares by private firms, enhancing compliance.
- Satellite communications giants like Intelsat, SES and Viasat are intensifying operations, targeting India's booming \$2.3 billion satellite communication market.
- SEBI is set to ease regulatory entry and compliance norms further to encourage foreign portfolio investment and deepen market participation.
- Paytm has received Reserve Bank of India approval for the online payment aggregator license, further reinforcing its digital payments leadership.
- Perplexity has launched a \$34.5 billion takeover bid for Chrome, signaling a bold expansion in the technology and search engine sector.
- Indian oil refiners are focusing on sourcing crude from Gulf nations, reflecting energy security strategies amid global trade shifts.
- SEBI is emphasizing streamlining of direct tax compliance, aiming to simplify processes and promote ease of doing business in capital markets.

## Geopolitical Updates:

- International trade relationships evolve as Trump's US doubles tariffs on India to 50%, prompting India to improve relations with China amidst rising protectionism.
- India and Oman have concluded negotiations for a comprehensive Free Trade Agreement, poised to boost bilateral trade and investment in key sectors.
- The recent US policy action on the Balochistan Liberation Army is seen as linked to America's mining interests in the mineral-rich region.

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