

Recent IPO Updates:

| FII/DII Activity (in ₹crores) | |
|-------------------------------|-----------|
| FII (Cash) | -3,644.43 |
| DII (Cash) | 5,623.79 |
| FII (Index Futures) | 460.82 |
| FII (Stock Futures) | 2591.72 |
| FII (Index Options) | -5,244.93 |
| FII (Stock Options) | 677.59 |

- Mangal Electrical Industries' ₹400 crore IPO opens August 20–22; fresh issue only, anchor August 19, listing August 28; proceeds earmarked for debt repayment, capex, working capital.
- InCred is expected to file its DRHP within three weeks, with Nomura and UBS among advisors, targeting a roughly ₹5,000–₹5,500 crore IPO and a near-₹25,000 crore valuation.

P.E. & Funding Updates:

| Global Market Snapshot | |
|------------------------|--------------------|
| Dow Jones | 44,922.27 (▲ 1.04) |
| S&P 500 | 6,445.76 (▲ 1.13) |
| Nasdaq | 21,681.90 (▲ 1.39) |
| Gift Nifty | 24,690.00 (▲ 0.76) |
| Nikkei 225 | 43,274.67 (▲ 1.30) |
| Hang Seng | 25,613.67 (▲ 2.58) |

- Fairdeal.Market raised \$3 million pre-Series A led by Incubate Fund Asia and Waterbridge; funds to deepen tech, expand Delhi-NCR zones and onboard more D2C/regional “hero” brands.
- Seeds Fincap raised ₹50 crore pre-Series B led by Z47 and Lok Capital, with Norinchukin and Alteria joining; funds to expand branches, strengthen tech and scale MSME lending.
- Cureous Labs raised ₹1.66 crore seed funding led by IPV with Anthill, to manufacture Eturnal units, launch a disinfection centre, scale sales and expand pressure-injury prevention portfolio.
- Motilal Oswal Financial Services invested ₹400 crore in Zepto via 7.54 crore CCPS, a treasury investment for long-term returns, as Zepto ramps up fundraising and eyes a 2026 IPO.

Business & Economic Updates:

- ICICI Bank cuts new savings account MAB after backlash: metros/urban Rs 15,000; semi-urban Rs 7,500; rural Rs 2,500; penalty: 6% of shortfall or Rs 500, whichever is lower.

| Macro Data | | |
|----------------------|-------------|-----------|
| Brent Crude | \$65.63 | (▼ -0.74) |
| Gold | ₹100,490.00 | (▲ 0.14) |
| Silver | ₹115,650.00 | (▲ 0.86) |
| Dollar Index | 97.79 | (▼ -0.29) |
| INR/USD | 87.46 | (▼ -0.30) |
| India 10Y Bond Yield | 6.41 | (▲ 0.00) |
| US 10Y Bond Yield | 4.25 | (▼ -0.93) |

| Indian Market | | |
|--------------------------|-----------|-----------|
| BSE Sensex | 80,539.91 | (▲ 0.18) |
| NIFTY 50 | 24,619.35 | (▲ 0.54) |
| BSE SENSEX 50 | 25,712.30 | (▲ 0.21) |
| NIFTY NEXT 50 | 66,622.25 | (▲ 0.60) |
| BSE SENSEX Next 50 | 82,291.89 | (▲ 0.04) |
| NIFTY BANK | 55,181.45 | (▲ 0.25) |
| BSE BANKEX | 61,484.00 | (▲ 0.29) |
| NIFTY FINANCIAL SERVICES | 26,238.40 | (▲ 0.39) |
| BSE FINANCIAL SERVICES | 12,414.43 | (▲ 0.45) |
| NIFTY MIDCAP SELECT | 12,699.10 | (▲ 1.09) |
| BSE MIDCAP | 45,059.67 | (▲ 0.10) |
| INDIA VIX | 12.14 | (▼ -0.74) |

- India's Chief Economic Advisor says US tariff impact should ease in 1–2 quarters; urges private sector to invest, diversify critical minerals, manage AI risks and boost jobs.
- Rapido debuts Ownly food delivery in Koramangala and HSR, pushing a zero-commission model with flat fees and most dishes under ₹150 to challenge Swiggy–Zomato dominance.
- Client Associates finds pre-IPO investors fared better, with 43% average gains, especially exiting at a six-month lock-in; IPO and post-IPO investors lagged BSE 500 significantly.
- SEBI's revamp modernizes 30-year-old broker rules, defining algos, proprietary trading and execution-only platforms and may enable brokers' access to NDS-OM and GIFT-IFSC activities.
- Insolvency resolution now averages 694 days, down from 752 in March, yet far above the 180–270-day norm; 78% exceed 270 days amid NCLT delays.
- Microfinance GLP fell to ₹3.59 lakh crore by June 2025, with active loan accounts down to 13.2 crore and live customers to 8 crore, amid RBI-driven moderation.
- India added nearly 3 million demat accounts in July, the highest since December 2024, pushing the total past 200 million amid IPO boom and SIP inflows.
- Groceries and supermarkets led July UPI merchant payments with 3.03 billion transactions worth ₹64,882 crore, while debt collection topped by value at ₹93,857 crore; P2M hit 12.38 billion.

- Banks are tightening checks on overseas direct investments amid a 96% drop in net FDI in FY25, demanding detailed viability, end-use proofs and CA/CPA certifications.

Geopolitical Updates:

- India and Singapore finalize ~10 pacts at the 3rd ISMR, boosting cooperation in connectivity, digitalization, healthcare, skills and sustainability; discuss India–Singapore undersea solar/data cable; PM-level unveiling expected.
- Trump warned Putin of “very severe consequences” if Russia doesn’t halt the Ukraine war after their Alaska summit, while floating a swift follow-up trilateral with Zelenskyy.
- US Treasury Secretary Scott Bessent warned the US could hike its 25% secondary tariff on India if the Trump–Putin Alaska summit stalls Ukraine progress, urging EU alignment.
- India is ramping diplomatic outreach with China and Russia ahead of the Tianjin SCO summit: Wang Yi visits Aug18; Jaishankar in Moscow Aug21; Modi to meet Xi and Putin.

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