

FII/DII Activity (in ₹crores)	
FII (Cash)	-634.26
DII (Cash)	2,261.06
FII (Index Futures)	-35.11
FII (Stock Futures)	4,404.23
FII (Index Options)	2394.36
FII (Stock Options)	-110.17

## Recent IPO Updates:

- OnEMI Technology Solutions, the company behind digital loan app Kissht, has filed for an IPO to raise up to ₹1,000 crore.
- Sattva Engineering Construction's IPO is scheduled to be open for subscription from August 26 to August 29, 2025.
- NIS Management's IPO of ₹60.01 crores is set to open on August 25, 2025, with a price band of ₹105-₹111 per share.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	44,922.27 (▲ 0.02)
S&P 500	6,449.15 (▼ -0.01)
Nasdaq	21,629.77 (▲ 0.03)
Gift Nifty	25,011.50 (▲ 0.19)
Nikkei 225	43,546.29 (▼ -0.38)
Hang Seng	25,122.90 (▼ -0.21)

- Kids' lifestyle brand Famyo secured ₹4 crore in seed funding led by IAN Angel Fund to develop IP and expand marketing efforts.
- Enmas EPC Power Projects raised ₹57 crore from investors to expand its execution capacity and capitalize on global opportunities in the energy sector.
- House of Biryan raised Rs 32 crore led by Bestvantage, with MS Dhoni participating, to expand from 22 kitchens to 120–150, target Rs450–550 crore revenue and enter global markets.
- Kiwi, a virtual RuPay credit-on-UPI app, is set to raise \$23 million led by Vertex Ventures at \$100M+ valuation, with Stellaris and Nexus participating.
- Weaver Services raised \$170 million led by Lightspeed and Premji Invest to build an AI-driven affordable housing finance platform, expand via acquisitions and grow across tier-2/3 cities.

Macro Data		
Brent Crude	\$65.79	(▼ -1.22)
Gold	₹98,830.00	(▼ -0.79)
Silver	₹111,140.00	(▼ -2.30)
Dollar Index	98.28	(▲ 0.13)
INR/USD	86.96	(▼ -0.46)
India 10Y Bond Yield	6.46	(▲ 0.00)
US 10Y Bond Yield	4.31	(▼ -0.69)

Indian Market		
BSE Sensex	81,644.39	(▲ 0.46)
NIFTY 50	24,980.65	(▲ 0.42)
BSE SENSEX 50	26,073.47	(▲ 0.38)
NIFTY NEXT 50	67,907.45	(▲ 0.75)
BSE SENSEX Next 50	83,881.81	(▲ 0.92)
NIFTY BANK	55,865.15	(▲ 0.23)
BSE BANKEX	62,269.60	(▲ 0.30)
NIFTY FINANCIAL SERVICES	26,592.30	(▼ -0.06)
BSE FINANCIAL SERVICES	12,605.63	(▲ 0.12)
NIFTY MIDCAP SELECT	12,908.30	(▲ 0.76)
BSE MIDCAP	45,870.04	(▲ 0.97)
INDIA VIX	11.79	(▼ -4.46)

- Beyond Appliances raised \$4 million led by Fireside Ventures to scale Android chimneys and smart stoves, add two factories, expand offline to Mumbai/Delhi and double ₹50 crore ARR.

## Business & Economic Updates:

- India is developing a new framework for cross-border insolvency, which will facilitate the management of cases involving debtors with assets or creditors in multiple jurisdictions.
- A new bill has been approved that seeks to ban "online money games" that involve paying a fee, with penalties for those who violate the law.
- The US has taken actions that negatively impact companies involved in cross-border payments, adding to global economic uncertainties.
- OpenAI is testing a new, more affordable ChatGPT plan priced at ₹399 per month for the Indian market.
- India's natural gas import bill fell by 9.4% to \$4.8 billion in April-July, driven by lower prices and a decline in imported volumes.
- The government estimates an annual revenue loss of ₹60,000 crore from the proposed GST 2.0 reforms, which aim to streamline rates.
- Private credit deals in India surged in the first half of the year, as global funds increased their investments.
- Vivifi India is aiming to generate 30-40% of its business from the MSME sector within the next 12 months.

- India says \$48.2B of exports face Trump's 50% US tariffs effective Aug 27, combining 25% reciprocal duty and 25% Russia-oil-linked levy; mitigation steps underway.
- S&P says proposed two-rate GST won't hurt long-term revenues and may lift short-term consumption; reforms, improved compliance and growth focus support India's BBB rating and 6.8% growth outlook.
- SEBI may allow mega IPOs with just 2.5% float above ₹5T m-cap, easing supply; Citi says this could enable a \$3B+ Jio IPO, halving prior requirements.

## Geopolitical Updates:

- India's External Affairs Minister, S. Jaishankar, is on a three-day visit to Moscow to strengthen the India-Russia strategic partnership.
- China has agreed to lift its export restrictions on fertilizers, rare earth minerals and tunnel boring machines to India.
- Trump told Fox News that Putin may be "tired" of the Ukraine war but might resist a deal; he ruled out US ground troops, floated possible air support instead.

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