

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,100.09
DII (Cash)	1,806.34
FII (Index Futures)	-323.31
FII (Stock Futures)	-1067.57
FII (Index Options)	-14,565.28
FII (Stock Options)	184.98

- Anlon Healthcare opens Aug 26, closes Aug 29; 1.33 cr fresh shares (₹121 cr); uses: capex, working capital, debt; listing Sep 3; FY24 PAT ₹9.65 cr.
- XED files DRHP to launch India's first IPO via GIFT City; NSE IFSC and India INX listing planned; mix of fresh issue/OFS; proceeds for tech capex, working capital, acquisition.
- Renewables eye ₹25,000 crore IPOs in FY26: Emmvee, Juniper Green ₹3,000 crore each; Prozeal ₹700 crore; Regreen ₹500 crore, Saatvik ₹1,150 crore; momentum post NTPC Green's ₹10,000 crore listing.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	44,938.31 (▲ 0.04)
S&P 500	6,411.37 (▼ -0.59)
Nasdaq	21,314.95 (▼ -1.46)
Gift Nifty	25,080.00 (▲ 0.27)
Nikkei 225	42,888.55 (▼ -1.51)
Hang Seng	25,165.94 (▲ 0.17)

- PeelOn raised \$1M led by GrowX Ventures, valuing it at \$7.9M, to scale biodegradable produce packaging; expand Vizag facility, US/India teams; products extend shelf life up to 3x.

## Business & Economic Updates:

- A Group of Ministers (GoM) has proposed a complete GST waiver on premiums for individual health and life insurance policies to make them more affordable. The GST Council will take the final decision.
- India's core sector growth slowed to 2% in July due to a contraction in key energy segments like coal and crude oil, despite strong performance in steel and cement.
- A report by Deloitte and FICCI projects India's retail sector will nearly double to \$1.93 trillion by 2030, driven by digital adoption, e-commerce and rising purchasing power.
- The Lok Sabha has tabled a bill to promote e-sports and social games while banning all forms of real-money gaming, betting and gambling, to protect users.

Macro Data		
Brent Crude	\$66.84	(▲ 1.60)
Gold	₹99,240.00	(▼ -99.90)
Silver	₹113,200.00	(▲ 1.85)
Dollar Index	98.26	(▼ -0.02)
INR/USD	87.08	(▲ 0.14)
India 10Y Bond Yield	6.46	(▲ 0.00)
US 10Y Bond Yield	4.3	(▼ -0.23)

Indian Market		
BSE Sensex	81,857.84	(▲ 0.26)
NIFTY 50	25,050.55	(▲ 0.28)
BSE SENSEX 50	26,146.09	(▲ 0.28)
NIFTY NEXT 50	68,164.30	(▲ 0.38)
BSE SENSEX Next 50	84,276.77	(▲ 0.47)
NIFTY BANK	55,698.50	(▼ -0.30)
BSE BANKEX	62,061.05	(▼ -0.33)
NIFTY FINANCIAL SERVICES	26,487.80	(▼ -0.39)
BSE FINANCIAL SERVICES	12,563.76	(▼ -0.33)
NIFTY MIDCAP SELECT	12,999.80	(▲ 0.71)
BSE MIDCAP	46,049.66	(▲ 0.39)
INDIA VIX	11.78	(▼ -0.08)

- Indian commercial banks experienced a 26% year-on-year increase in slippages during the first quarter, primarily due to stress in microfinance and unsecured retail loan portfolios.
  - India successfully test-fired its long-range ballistic missile, Agni-5, from Odisha, validating its operational and technical parameters. The missile has a range of around 5,000 km.
  - India's fertiliser imports rose 5% to 4.85 metric tonnes in April–July FY26 amid kharif demand; DAP/urea/NPK increased, while MOP decreased; subsidies may rise as tenders seek more urea.
  - Sebi set to revamp block deals: tighter  $\pm 1\%$  F&O,  $\pm 3\%$  non-F&O bands; hike minimum size to ₹25 cr; common 30-min reference; exploring OFS-like route for non-promoters.
- ## Geopolitical Updates:
- India and the Russia-led Eurasian Economic Union (EAEU) have signed terms of reference to start negotiations for a Free Trade Agreement (FTA), aiming to boost trade and investment.
  - Israel has reportedly begun preliminary operations to seize Gaza City, calling up 60,000 new reservists as part of a military plan to defeat Hamas.
  - Xi Jinping made a rare visit to Tibet, marking 60 years of Beijing's rule; he urged a "modern socialist" Tibet amid concerns over repression, diaspora protests and border infrastructure development.
  - Putin derides Zelensky as the West's "illegitimate puppet," complicating prospects for direct peace talks; analysts say Moscow would meet only if Kyiv concedes core demands.

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