

Recent IPO Updates:

| FII/DII Activity (in ₹crores) | |
|-------------------------------|----------|
| FII (Cash) | 1,246.51 |
| DII (Cash) | 2,546.27 |
| FII (Index Futures) | 970.15 |
| FII (Stock Futures) | -984.38 |
| FII (Index Options) | 2,083.63 |
| FII (Stock Options) | 319.65 |

- The Sugs Lloyd Limited IPO is about to launch and involves a fresh issue of up to .70 Cr equity shares worth of ₹85.66 crore to meet working capital requirements. The company is in the renewable energy sector.
- Paynearby, a fintech firm, is planning to go public next year after achieving 12 consecutive quarters of profitability and expanding its network of retailers.

P.E. & Funding Updates:

| Global Market Snapshot | |
|------------------------|---------------------|
| Dow Jones | 44,785.50 (▼ -0.34) |
| S&P 500 | 6,395.78 (▼ -0.24) |
| Nasdaq | 21,172.86 (▼ -0.67) |
| Gift Nifty | 25,112.50 (▲ 0.13) |
| Nikkei 225 | 42,610.17 (▼ -0.65) |
| Hang Seng | 25,104.61 (▼ -0.24) |

- Motilal Oswal Alternates has successfully raised approximately \$800 million for its fifth private equity fund, surpassing its initial target of \$750 million.
- Delhi-based FMCG startup Mitra raised ₹14 crore bridge round led by Bestvantage; funding to expand distribution, launch 3,000-tonne flour plant, target GCC, prep Series A 2026.
- Edgehax raised ₹1.39 crore seed funding led by Inflection Point Ventures to scale manufacturing, speed product development and expand to Singapore, the US and Europe with Make-in-India edge AI boards.
- Hexafun raised ₹4.5 crore seed funding led by Prajay Advisors to expand retail, boost marketing and launch “Insanely Indian” culture-forward accessories across metro and high-growth cities.

Business & Economic Updates:

| Macro Data | | |
|----------------------|-------------|----------|
| Brent Crude | \$67.67 | (▲ 1.24) |
| Gold | ₹99,530.00 | (▲ 0.29) |
| Silver | ₹114,280.00 | (▲ 0.95) |
| Dollar Index | 98.65 | (▲ 0.40) |
| INR/USD | 87.27 | (▲ 0.22) |
| India 10Y Bond Yield | 6.46 | (▲ 0.00) |
| US 10Y Bond Yield | 4.33 | (▲ 0.70) |

| Indian Market | | |
|--------------------------|-----------|-----------|
| BSE Sensex | 82,000.71 | (▲ 0.17) |
| NIFTY 50 | 25,083.75 | (▲ 0.13) |
| BSE SENSEX 50 | 26,181.08 | (▲ 0.13) |
| NIFTY NEXT 50 | 67,972.65 | (▼ -0.28) |
| BSE SENSEX Next 50 | 84,144.56 | (▼ -0.16) |
| NIFTY BANK | 55,755.45 | (▲ 0.10) |
| BSE BANKEX | 62,134.84 | (▲ 0.12) |
| NIFTY FINANCIAL SERVICES | 26,573.35 | (▲ 0.32) |
| BSE FINANCIAL SERVICES | 12,584.52 | (▲ 0.17) |
| NIFTY MIDCAP SELECT | 12,921.35 | (▼ -0.60) |
| BSE MIDCAP | 45,993.82 | (▼ -0.12) |
| INDIA VIX | 11.37 | (▼ -3.48) |

- A Group of Ministers approved a GST rejig to reduce tax slabs, but some states are concerned about potential revenue losses. The proposal aims to simplify the tax structure.
- Foreign EM funds cut India by 110 bps MoM in July, now the largest underweight at -2.9 ppts; rotations favor China, Hong Kong, Korea as Trump tariff risks rise.
- Parliament passed the Online Gaming Bill, 2025, which bans real money games and imposes penalties, but provides a boost for the esports industry.
- The SEBI chief has hinted at increasing the tenure of equity derivative products in a bid to curb excessive trading and protect retail investors from significant losses.
- Following the passing of the Online Gaming Bill, several online money gaming platforms, including Dream11 and Zupee, have started to suspend their paid operations.
- The SEBI chairperson, Tuhin Kanta Pandey, has suggested a regulated pre-IPO trading platform to replace the unregulated "grey market" and enhance investor protection.
- As of July 25, 2025, bank credit grew by 10.0% year-on-year to ₹185.0 lakh crore, while deposits increased by 10.2% to ₹233.5 lakh crore.

- India's private sector economy saw its fastest growth since 2005 in August, with the services sector reaching an all-time high, driven by new business orders.
- GNPA fell to 2.3% in June 2025 from 2.7% YoY; system GNPA ₹4.18 lakh crore. Private banks' bad loans rose 7.6% YoY on MFI, unsecured stress.

Geopolitical Updates:

- India's External Affairs Minister, S. Jaishankar, stated that the relationship between India and Russia is one of the most stable among major global powers after World War II.
- China's Ministry of Foreign Affairs spokesperson opposed the US's "abuse of tariffs" against India, stating that such actions politicize trade issues and are not constructive.
- The US and EU issued a joint statement outlining a trade framework: a 15% cap on most EU exports; potential auto tariff relief; the EU pledges industrial tariff cuts and energy purchases.
- US Secretary of State Marco Rubio confirmed that Russian President Vladimir Putin is conditionally ready to meet Ukrainian President Volodymyr Zelensky to discuss a potential peace deal.
- India and Russia are on track to achieve their bilateral trade target of \$100 billion by 2030, with growing investments and deepening economic and strategic ties.

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