

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,622.52
DII (Cash)	-329.25
FII (Index Futures)	-657.72
FII (Stock Futures)	-1769.88
FII (Index Options)	-1,940.41
FII (Stock Options)	194.82

- Holiday-shortened week from August 25: 10 IPOs worth Rs 1,240 crore open—Vikran Engineering (issue size Rs 772 crore), Anlon Healthcare (issue size Rs 121.03 crore)—plus eight SME issues and eight listings scheduled.
- Oval Projects Engineering's BSE SME IPO opens Aug 28-Sep 1; 55 lakh fresh shares. Oil & gas EPC/O&M player with 30+ projects; FY25 revenue ₹102.29 crore, PAT ₹9.33 crore.

## P.E. & Funding Updates:

- Neo to raise Rs 162 crore (\$19m) led by VT Capital; 17 investors join. Post-money about \$686m. Earlier \$20m in Feb; FY24 revenue Rs 177 crore, loss Rs 13.7 crore.

Global Market Snapshot	
Dow Jones	44,785.50 (▲ 0.00)
S&P 500	6,370.17 (▼ -0.40)
Nasdaq	21,100.31 (▼ -0.34)
Gift Nifty	24,879.00 (▼ -0.93)
Nikkei 225	42,610.17 (▲ 0.00)
Hang Seng	25,104.61 (▲ 0.00)

## Business & Economic Updates:

- Road transport minister Nitin Gadkari stated that India's focus on developing world-class infrastructure at a reduced cost is crucial for reaching the \$5 trillion economy goal. The rapid expansion of e-ways and the development of alternative fuels are helping to lower logistics costs to a single-digit percentage.
- The GST Council will meet on Sept. 3-4 to consider a new two-slab tax structure of 5% and 18%, which aims to simplify the system and boost consumption.
- The market-wide position limit (MWPL) for certain securities in the Futures and Options (F&O) segment has been set at 1% or higher, reflecting trading activity.
- The Chinese video-sharing app TikTok has become partially accessible to some users in India through its web version, five years after the app was banned.
- Ola Electric has received shareholder approval to reallocate its IPO funds for R&D and debt repayment instead of using the proceeds for a cell manufacturing plant.

Macro Data		
Brent Crude	\$67.67	(▲ 0.00)
Gold	₹100,630.00	(▲ 1.11)
Silver	₹116,770.00	(▲ 2.18)
Dollar Index	98.62	(▼ -0.03)
INR/USD	87.27	(▲ 0.00)
India 10Y Bond Yield	6.46	(▲ 0.00)
US 10Y Bond Yield	4.33	(▲ 0.00)

Indian Market		
BSE Sensex	82,000.71	(▲ 0.00)
NIFTY 50	25,083.75	(▲ 0.00)
BSE SENSEX 50	26,181.08	(▲ 0.00)
NIFTY NEXT 50	67,972.65	(▲ 0.00)
BSE SENSEX Next 50	84,144.56	(▲ 0.00)
NIFTY BANK	55,755.45	(▲ 0.00)
BSE BANKEX	62,134.84	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,573.35	(▲ 0.00)
BSE FINANCIAL SERVICES	12,584.52	(▲ 0.00)
NIFTY MIDCAP SELECT	12,921.35	(▲ 0.00)
BSE MIDCAP	45,993.82	(▲ 0.00)
INDIA VIX	11.37	(▲ 0.00)

- India's foreign exchange reserves increased by \$1.488 billion, reaching a total of \$695.106 billion for the week ending August 15, according to the RBI.
- The SEBI chairman has urged mutual funds to exercise caution when investing in micro-cap stocks due to their high volatility and potential liquidity constraints.
- Bond yields have risen to a five-month high, driven by concerns over increased debt supply and the financial implications of the proposed GST rate changes.
- Private equity giants are increasing their investments in India's private hospital sector, driving consolidation and providing capital for expansion to meet growing healthcare demand.
- FPIs net sold ₹20,976 crore in early August, heavily offloading financials (₹13,471 crore), IT (₹6,380 crore) and oil & gas (₹4,091 crore); telecom saw ₹7,446 crore inflows.

## Geopolitical Updates:

- Ukrainian President Zelenskyy claims Russia is blocking a meeting with President Putin. Russia's foreign minister, however, stated that no proper agenda is ready for such a summit.
- The Shanghai Cooperation Organization (SCO) summit will be hosted by China from August 31 to September 1, with over 20 world leaders, including PM Modi and President Putin, attending.
- John Kerry warned Trump's ultimatum-driven approach risks alienating allies like India, amid US "secondary tariffs" lifting duties above 50%, urging cooperative diplomacy and noting India's zero-tariff offer prospects.

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