

## 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

- Molbio Diagnostics files for IPO: ₹200 crore fresh issue plus 1.25 crore-share OFS; funds earmarked for R&D, manufacturing capex; FY25 revenue ₹1,020 crore, PAT ₹138.5 crore.
- Nuvama flags ₹1.6 lakh crore IPO lock-in expiries across 57 firms over three months; Ather Energy's 44% unlock on Nov 6 stands out; near-term supply, volatility risks.
- Amanta Healthcare's IPO opens September 1: fresh issue of 1 crore shares; funds for new SteriPort and SVP lines; allotment September 4, listing September 8; FY25 PAT up 189%.

Global Market Snapshot	
Dow Jones	45,631.74 (▲ 1.89)
S&P 500	6,370.17 (▲ 0.00)
Nasdaq	21,100.31 (▲ 0.00)
Gift Nifty	24,879.00 (▲ 0.00)
Nikkei 225	42,633.29 (▲ 0.05)
Hang Seng	25,339.14 (▲ 0.93)

## P.E. & Funding Updates:

- Indian startups raised \$277M across 15 deals (Aug 18–23). Weaver Services led with \$170M; Amnex \$52.7M; R for Rabbit, Goldi Solar and Beyond Appliances raised \$46.75M combined.
- Fintech startup Kiwi, which offers credit on India's UPI network, has raised \$24 million in a Series B funding round to accelerate its product development.
- Mithila Foods raised Rs 1.5 crore seed funding from AJVC to scale Bihar-focused staples; 20+ SKUs, 25,000 customers across 4,000 pincodes; annualised revenue Rs 3 crore.
- Goldiam International raised ₹202 crore via QIP, backed by marquee investors including Morgan Stanley, to scale ORIGEM with 70–90 LGD jewellery stores in 18–24 months.

Macro Data		
Brent Crude	\$67.73	(▲ 0.09)
Gold	₹100,570.00	(▼ -0.06)
Silver	₹116,540.00	(▼ -0.20)
Dollar Index	97.72	(▼ -0.91)
INR/USD	87.53	(▲ 0.30)
India 10Y Bond Yield	6.52	(▲ 0.93)
US 10Y Bond Yield	4.26	(▼ -1.62)

Indian Market		
BSE Sensex	81,306.85	(▼ -0.85)
NIFTY 50	24,870.10	(▼ -0.85)
BSE SENSEX 50	25,962.41	(▼ -0.84)
NIFTY NEXT 50	67,540.10	(▼ -0.64)
BSE SENSEX Next 50	83,747.43	(▼ -0.47)
NIFTY BANK	55,149.40	(▼ -1.09)
BSE BANKEX	61,474.93	(▼ -1.06)
NIFTY FINANCIAL SERVICES	26,317.05	(▼ -0.96)
BSE FINANCIAL SERVICES	12,478.41	(▼ -0.84)
NIFTY MIDCAP SELECT	12,935.80	(▲ 0.11)
BSE MIDCAP	45,890.28	(▼ -0.23)
INDIA VIX	11.73	(▲ 3.17)

- Altum Credo Home Finance raised Rs 170 crore (\$19.5 million) equity from BII to expand affordable housing lending across south-west India; FY24 revenue ₹112.9 crore, profit ₹20 crore.

## Business & Economic Updates:

- The Indian government is promoting local manufacturing for the renewable energy sector through schemes and new guidelines to boost production and exports.
- India is set to play a significant role in the global economy, with experts projecting its contribution to global growth to reach 20%.
- A recent sovereign rating upgrade and ongoing market reforms have made India's bond market more attractive to foreign investors, including sovereign funds.
- India has successfully tested its first Integrated Air Defence Weapon System (IADWS), capable of simultaneously neutralizing multiple threats like missiles and drones.
- The Indian government is preparing a support package of about Rs 25,000 crore to boost Indian exports and mitigate the impact of tariffs from the US.
- While a reduction to 18% GST is being considered for mass-market vehicles, larger bikes (above 350cc) currently face a combined tax rate of 31% (28% GST + 3% cess), but may face a 40% special rate.

- Following SBI, the Bank of India has now also classified the loan account of Reliance Communications (RCom) and its former director, Anil Ambani, as fraudulent. TM

## Geopolitical Updates:

- Canadian Prime Minister Mark Carney has arrived in Kyiv for his first official visit to show Canada's solidarity with Ukraine on its Independence Day.
- Ukrainian drones reportedly struck a Russian nuclear plant and a fuel terminal on Ukraine's Independence Day, raising concerns about nuclear safety.
- Israel has carried out airstrikes on Yemen's capital, Sanaa, in response to repeated drone and missile attacks from the Houthi rebel group.
- India is in continuous trade discussions with multiple partners, including the EU, US, Chile and Peru, to finalize new free trade agreements.

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