

FII/DII Activity (in ₹crores)	
FII (Cash)	-6,516.49
DII (Cash)	7,060.37
FII (Index Futures)	-1,302.89
FII (Stock Futures)	34.57
FII (Index Options)	5,110.99
FII (Stock Options)	-47.96

Global Market Snapshot	
Dow Jones	45,565.23 (▲ 0.32)
S&P 500	6,465.94 (▲ 0.41)
Nasdaq	21,544.27 (▲ 0.44)
Gift Nifty	24,697.50 (▲ 0.00)
Nikkei 225	42,520.27 (▲ 0.30)
Hang Seng	25,201.76 (▼ -1.27)

Recent IPO Updates:

- Goel Construction's (Jaipur-based EPC contractor) BSE SME IPO will open 2–4 Sep 2025 with a fresh issue of 38.08 lakh shares worth ₹99.77 cr; registrar MUFG Intime.
- SEBI remains optimistic on IPOs despite tariff jitters; July saw 31 filings, 21 cleared; August target 35–40 clearances; ₹4.3 lakh cr raised FY25; urges merchant bankers for realistic valuations.
- OYO plans November DRHP filing, eyeing a \$7–8 billion IPO valuation; SoftBank, key banks engaged; board nod awaited; valuation seen at 25–30x EBITDA.

P.E. & Funding Updates:

- Anmasa raised \$1.1M pre-seed led by Snow Leopard, Veltis, Blume, Indigram; Gurugram omnichannel staples brand offering 90-minute delivery; plans 10 outlets, Delhi-NCR expansion.
- BiofuelCircle raised ₹70 crore from Spectrum Impact and angels at ₹525 crore valuation (+86%); revenues tripled to ₹29 crore FY24, losses fell 28%; competes with Buyofuel.
- TransBnk raised \$25M Series B led by Bessemer; funds for expansion and talent. Provides API-led escrow and cashflow automation; 40+ bank integrations, 220 clients, 1,500 APIs monthly.

Business & Economic Updates:

- The RBI will meet with industry leaders next month to evaluate the full impact of the recent US tariffs on Indian exports and the broader economy.

Macro Data		
Brent Crude	\$68.05	(▲ 1.23)
Gold	₹101,690.00	(▲ 0.41)
Silver	₹116,990.00	(▲ 0.47)
Dollar Index	98.2	(▼ -0.04)
INR/USD	87.69	(▲ 0.11)
India 10Y Bond Yield	6.52	(▲ 0.00)
US 10Y Bond Yield	4.24	(▼ -0.70)

Indian Market		
BSE Sensex	81,635.91	(▲ 0.00)
NIFTY 50	24,967.75	(▲ 0.00)
BSE SENSEX 50	26,065.61	(▲ 0.00)
NIFTY NEXT 50	67,711.35	(▲ 0.00)
BSE SENSEX Next 50	83,824.66	(▲ 0.00)
NIFTY BANK	55,139.30	(▲ 0.00)
BSE BANKEX	61,463.87	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,306.90	(▲ 0.00)
BSE FINANCIAL SERVICES	12,470.44	(▲ 0.00)
NIFTY MIDCAP SELECT	12,953.35	(▲ 0.00)
BSE MIDCAP	45,937.79	(▲ 0.00)
INDIA VIX	11.76	(▲ 0.00)

- An EY report suggests India could become the world's second-largest economy by 2038 based on Purchasing Power Parity, driven by strong domestic fundamentals.
- In response to US tariffs, India is planning to diversify its textile exports by launching targeted outreach programs in 40 nations, including the UK and Japan.
- Tata Sons and Jio Infocomm led the list of unlisted companies in India with the highest profits for the financial year 2024-25, highlighting their strong performance.
- The finance ministry has warned that the secondary and tertiary effects of the US tariffs, particularly on small and medium enterprises, could be more significant than the initial impact.
- India is set to sign a pact with a UN body to secure a stable supply of critical minerals essential for its clean energy and technology sectors.
- SEBI has received a report on reclassifying Infrastructure Investment Trusts (InvITs) as equity, a move aimed at enhancing liquidity amid a rush of new InvIT IPOs.
- According to official data, the Gross Value Added (GVA) of India's manufacturing sector grew by 11.9% in the 2023-24 fiscal year, reflecting strong industrial performance.
- The aggregate net profit of Indian companies grew at its weakest pace in three quarters during the first quarter of FY26, signaling a slowdown in earnings.

- India is considering easing some restrictions on foreign direct investment from China, a move that could be part of a broader effort to improve bilateral relations.

Geopolitical Updates:

- Both India and the US have expressed a willingness to resolve the ongoing tariff disputes, with diplomatic channels remaining open to find a solution.
- The next round of talks for a Free Trade Agreement between India and the European Union is expected to be the final one, aiming to conclude the pact soon.
- A delegation from the Russia-led Eurasian Economic Union (EAEU) will visit India in September to hold talks on a Free Trade Agreement between the two sides.
- Russia has strongly rejected any possibility of European peacekeeping troops being deployed to Ukraine, stating it views such a move negatively.
- President Donald Trump reiterated his claim that he prevented a potential nuclear conflict between India and Pakistan during his presidency.

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