

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,856.51
DII (Cash)	6,920.34
FII (Index Futures)	-2,868.11
FII (Stock Futures)	-1312.19
FII (Index Options)	-3,737.30
FII (Stock Options)	-3225.33

Global Market Snapshot	
Dow Jones	45,636.90 (▲ 0.16)
S&P 500	6,481.40 (▲ 0.24)
Nasdaq	21,590.14 (▲ 0.21)
Gift Nifty	24,626.00 (▼ -0.29)
Nikkei 225	42,828.79 (▲ 0.73)
Hang Seng	24,998.82 (▼ -0.81)

## Recent IPO Updates:

- Online investment platform Groww has received SEBI approval for its IPO, with plans to raise between \$800 million and \$1 billion.
- Aragen Life Sciences is considering an IPO to support its global expansion and fund its research and development initiatives.
- Vigor Plast India Limited's IPO is a book-built issue of ₹11.39 crore, with the proceeds intended for its expansion plans.
- Mumbai's SFC Environmental Tech filed an IPO draft with SEBI; aims to raise ₹150 crore via fresh issue and OFS for debt repayment and expansion.

## P.E. & Funding Updates:

- BhaoBhao, an Indian Pet Care startup, raised \$200,000 in funding from Angel investors, plans to expand beyond Mumbai.
- Matiks, a Math-centered gaming platform, raises \$3.14 million in a pre-Series A funding round led by Tanglin Ventures, plans for team and market expansion.
- Nuyug, a jewelry brand, raised Rs 2.5 crore in a pre-seed funding round led by AJVC & angel investors, plans design & catalogue innovation & sales channels strengthening via capital.
- Cumin Co., a kitchenware start-up, raised funding of Rs 13.16 cr in a round led by Fireside Ventures & Huddle Ventures, plans to expand enamel-based coating manufacturing & supply chain betterment.
- Private equity firms are increasingly investing in enterprise Software-as-a-Service (SaaS) companies, with investments in the sector rising by 66% in 2025.

Macro Data	
Brent Crude	\$67.98 (▼ -0.10)
Gold	₹102,480.00 (▲ 0.78)
Silver	₹117,640.00 (▲ 0.56)
Dollar Index	97.9 (▼ -0.31)
INR/USD	87.63 (▼ -0.07)
India 10Y Bond Yield	6.52 (▲ 0.00)
US 10Y Bond Yield	4.21 (▼ -0.71)

Indian Market	
BSE Sensex	80,080.57 (▼ -1.91)
NIFTY 50	24,500.90 (▼ -1.87)
BSE SENSEX 50	25,563.53 (▼ -1.93)
NIFTY NEXT 50	65,940.30 (▼ -2.62)
BSE SENSEX Next 50	81,678.95 (▼ -2.56)
NIFTY BANK	53,820.35 (▼ -2.39)
BSE BANKEX	60,113.41 (▼ -2.20)
NIFTY FINANCIAL SERVICES	25,640.30 (▼ -2.53)
BSE FINANCIAL SERVICES	12,132.24 (▼ -2.71)
NIFTY MIDCAP SELECT	12,535.15 (▼ -3.23)
BSE MIDCAP	44,826.24 (▼ -2.42)
INDIA VIX	12.18 (▲ 3.57)

- Elevation Capital, a venture capital firm, has launched a new \$400 million fund to invest in Indian startups preparing for an IPO.

## Business & Economic Updates:

- India's industrial output rose to a four-month high of 3.5% in July, driven by a strong performance in the manufacturing sector.
- Indian banks are considering a proposal to allow large ships to be used as collateral for loans, a move that could help the shipping industry.
- Water purifier manufacturers are urging the government to reduce the GST on their products to 5%, citing their role in public health.
- Satellite communication companies are appealing for relief on license fees, spectrum usage charges (SUC) and bank guarantee requirements to support the industry's growth.
- The Department of Telecommunications (DoT) has been left with a significant amount of unsold spectrum after the recent auctions, totaling ₹1.16 lakh crore.
- A CBI court has accepted a closure report in a case related to the NSE co-location scam, citing insufficient evidence to prosecute.
- Indian stock markets closed 0.9% lower, with all sectors except consumer durables experiencing a decline due to prevailing market uncertainty.
- The assets under management (AUM) of the mutual fund industry rose to a record ₹76.7 lakh crore in July, driven by robust inflows.
- A recent report indicates that while US tariffs pose a downside risk, India's supportive financial conditions are likely to cushion the impact on the economy.

By  
**India IPO**

- The Reserve Bank of India (RBI) is scheduled to conduct a variable rate reverse repo (VRRR) auction of ₹1.5 lakh crore today to manage liquidity.
- The government is reportedly preparing a package for MSMEs, similar to the support provided during the Covid-19 pandemic, to help them cope with current economic challenges.
- Semiconductor company CG Semi is preparing to roll out the first 'Made in India' chip from its pilot facility, a significant milestone for the country's semiconductor mission.
- A new report suggests that private sector capital expenditure in India is expected to rise by 20% in the financial year 2025-26, boosting economic growth.
- The Indian rupee is under pressure from the combined effect of new US tariffs and the continued outflow of funds by foreign portfolio investors (FPIs).
- India is expected to increase its imports of Russian oil in September, despite the new US tariffs and pressure from Western nations.

## Geopolitical Updates:

- India has stated that trade talks with the US will only proceed after the recently imposed tariffs on Indian goods are reversed.
- Russian air attacks on Kyiv have resulted in the deaths of 19 people, as the conflict in Ukraine continues to escalate.
- North Korean leader Kim Jong Un and Russian President Vladimir Putin will join Chinese President Xi Jinping at a military parade, a display of unity against Western nations.

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