

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-8,312.66
DII (Cash)	11,487.64
FII (Index Futures)	-1,239.02
FII (Stock Futures)	1612.52
FII (Index Options)	-7,559.55
FII (Stock Options)	239.05

Global Market Snapshot	
Dow Jones	45,544.88 (▼ -0.20)
S&P 500	6,501.86 (▲ 0.00)
Nasdaq	21,705.16 (▲ 0.00)
Gift Nifty	24,578.50 (▲ 0.10)
Nikkei 225	42,718.47 (▼ -0.26)
Hang Seng	25,077.62 (▲ 0.32)

- Eight IPOs this week: Amanta Healthcare mainboard (Rs126cr, Sept 1–3); seven SME issues. Thirteen listings slated Sept 1–5 across mainboard and SME amid weak equities.
- Anlon Healthcare IPO, subscribed 7.12 times, finalized share allotment on September 1. Listing scheduled for September 3, with shares credited to successful applicants' demat accounts on September 2.
- Nomura's Mahesh Natarajan predicts block transactions will surpass IPOs in FY26, driven by confidence in larger deals and strong foreign investor interest in the Indian equity market.
- Tata Capital plans a \$2 billion (₹17,200 crore) IPO in late September 2025, targeting an \$11 billion valuation. The IPO includes fresh equity and offer for sale shares. Proceeds will boost Tier-1 capital.
- Leap India has filed for a Rs 2,400 crore IPO, including a Rs 400 crore fresh issue and Rs 2,000 crore offer-for-sale, backed by KKR-promoted Vertical Holdings II.
- Winspark (PlanetSpark) targets IPO after two profitable years and ₹800 crore revenue; expects FY26 profitability, ₹145–150 crore FY25 revenue, \$27M funding, expanding via Winspark.ai.

P.E. & Funding Updates:

- Elev8 Venture Partners closed its maiden fund at Rs 1,400 crore (\$160 million), focusing on growth-stage investments in consumer internet, fintech and enterprise software startups across India and Asia.

Macro Data	
Brent Crude	\$67.48 (▼ -0.74)
Gold	₹105,270.00 (▲ 1.13)
Silver	₹124,040.00 (▲ 2.61)
Dollar Index	97.77 (▼ -0.04)
INR/USD	88.21 (▲ 0.66)
India 10Y Bond Yield	6.57 (▲ 0.77)
US 10Y Bond Yield	4.21 (▲ 0.00)

Indian Market	
BSE Sensex	79,809.65 (▲ 0.00)
NIFTY 50	24,426.85 (▲ 0.00)
BSE SENSEX 50	25,478.32 (▲ 0.00)
NIFTY NEXT 50	65,745.75 (▲ 0.00)
BSE SENSEX Next 50	81,474.64 (▲ 0.00)
NIFTY BANK	53,655.65 (▲ 0.00)
BSE BANKEX	60,025.39 (▲ 0.00)
NIFTY FINANCIAL SERVICES	25,567.70 (▲ 0.00)
BSE FINANCIAL SERVICES	12,086.93 (▲ 0.00)
NIFTY MIDCAP SELECT	12,450.20 (▲ 0.00)
BSE MIDCAP	44,642.31 (▲ 0.00)
INDIA VIX	11.75 (▲ 0.00)

- Nineteen Indian startups raised over \$120 million (Aug 25–30, 2025), led by TransBnk \$25M, Kiwi \$24M; NBFCs dominated; multiple Series A rounds and M&A activity surfaced.

Business & Economic Updates:

- India has notified rules allowing up to 100% FDI in insurance via the automatic route, replacing the previous 74% cap to boost sector growth and coverage.
- India plans immediate liquidity support and long-term reforms to aid exporters affected by US tariffs, ensuring employment, market diversification and resilient supply chains.
- Foreign inflows into Indian government bonds via the fully accessible route rose to Rs 9,690 crore in August 2025, driven by widening yield spreads versus US Treasuries.
- Sebi's enhanced Cybersecurity and Cyber Resilience Framework improves market security but challenges smaller firms with costs and technical demands, urging phased implementation and regulatory flexibility.
- Foreign Portfolio Investors (FPIs) sold \$3.99 billion (₹34,993 crore) worth of Indian equities in August 2025, the highest in seven months, amid US tariffs and high valuations.
- India's private sector capital expenditure is expected to rise 21.5% to Rs 2.67 lakh crore in FY26, supported by strong macro fundamentals, policy rate cuts and infrastructure focus, led by the power sector.

- Amazon's Project Kuiper plans to launch satellite internet services in India by 2026, after securing necessary licenses and meeting government compliance, but currently trails competitors Starlink, OneWeb and Jio Satellite.

Geopolitical Updates:

- India and Japan will collaborate on defence and critical minerals, emphasizing private sector cooperation, technology sharing and co-development for enhanced security and industrial ties.
- Ahead of Modi's talks with Putin at the SCO summit, Zelenskyy urged Modi for a ceasefire, with India pledging support for peace and diplomatic efforts.
- Russia and China oppose discriminatory sanctions targeting BRICS, advocate IMF and World Bank reforms and seek fairer access and a multipolar world order.

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