

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-106.34
DII (Cash)	2,233.09
FII (Index Futures)	-1,073.01
FII (Stock Futures)	-2006.78
FII (Index Options)	10,307.56
FII (Stock Options)	-283.39

- Knack Packaging filed DRHP with Sebi for an IPO: ₹475 crore fresh issue plus OFS of 70 lakh shares; ₹435 crore to a new Gujarat facility, rest corporate purposes.
- PhonePe plans confidential IPO filing by September-end; IPO size ₹10,000–13,000 crore with fresh issue and OFS; possible 10% equity sale; early-2026 listing target.

P.E. & Funding Updates:

- FlexifyMe raised Rs 20 crore pre-Series A led by IvyCap, with Signal Ventures, to expand hybrid care, launch posture labs and scale AI physiotherapy solutions and partnerships.
- Reveal HealthTech raised \$7.2 million Series A led by Leo Capital and Sanos Capital to expand AI healthcare solutions, sales reach and products like BioCanvas and Prism AI.
- QuantE Energy Tech raised \$500,000 seed led by TDV Partners, with angels; funds to expand residential solar/EV/ESS services, pilots, financing partnerships and build solar+AI stack.

Global Market Snapshot	
Dow Jones	45,621.29 (▲ 0.77)
S&P 500	6,448.26 (▲ 0.51)
Nasdaq	21,497.73 (▲ 1.02)
Gift Nifty	24,827.50 (▲ 0.06)
Nikkei 225	42,580.27 (▲ 1.53)
Hang Seng	25,058.51 (▼ -1.12)

Business & Economic Updates:

- Union minister Piyush Goyal has urged Indian industries to pass on the benefits of the recent GST rate cuts to consumers to boost demand.
- SEBI is expected to modify its recent proposal on the governance of Market Infrastructure Institutions (MIIs) to address concerns from stakeholders.
- "Sin goods" like tobacco and aerated drinks may be subject to an extra tax levy, with a 40% GST slab being introduced to discourage consumption.

- Due to recent reforms and robust economic indicators, Indian businesses are experiencing improved demand visibility, with expectations for steady growth.
- Analysts believe the recent GST rate cuts could boost India's GDP growth by 10-60 basis points, driven by increased consumer consumption and lower inflation.
- The recent GST Council reforms are set to benefit Micro, Small and Medium Enterprises (MSMEs) by lowering input costs and correcting inverted duty structures.

Geopolitical Updates:

- India and Singapore have decided to broaden their strategic partnership, focusing on deepening cooperation in defense technology and maritime security.
- Russian President Vladimir Putin cautioned the United States against using tariffs and sanctions to strong-arm India and China, stating that the "colonial era is now over."
- India and China are actively developing their own alternative payment systems to reduce their vulnerability to sanctions and pressure from the United States.
- Chinese President Xi Jinping held talks with North Korean leader Kim Jong Un, marking their first meeting in six years, during Kim's rare visit to Beijing.

Macro Data	
Brent Crude	\$66.99 (▼ -0.90)
Gold	₹107,410.00 (▲ 0.94)
Silver	₹124,590.00 (▲ 0.39)
Dollar Index	98.27 (▲ 0.12)
INR/USD	88.16 (▲ 0.09)
India 10Y Bond Yield	6.58 (▲ 0.00)
US 10Y Bond Yield	4.16 (▼ -1.42)

Indian Market	
BSE Sensex	80,718.01 (▲ 0.19)
NIFTY 50	24,734.30 (▲ 0.08)
BSE SENSEX 50	25,802.84 (▲ 0.11)
NIFTY NEXT 50	67,151.55 (▼ -0.46)
BSE SENSEX Next 50	82,945.18 (▼ -0.48)
NIFTY BANK	54,075.45 (▲ 0.01)
BSE BANKEX	60,480.39 (▲ 0.05)
NIFTY FINANCIAL SERVICES	25,853.40 (▲ 0.47)
BSE FINANCIAL SERVICES	12,245.22 (▲ 0.15)
NIFTY MIDCAP SELECT	12,738.80 (▼ -0.27)
BSE MIDCAP	45,504.35 (▼ -0.60)
INDIA VIX	10.85 (▼ -0.73)

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