

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,666.46
DII (Cash)	2,495.33
FII (Index Futures)	-435.79
FII (Stock Futures)	-2084.48
FII (Index Options)	-19,323.48
FII (Stock Options)	-267.74

- Dev Accelerator's IPO opens September 10–12; an all-fresh issue of 2.35 crore shares. Listing on September 17 on BSE, NSE; proceeds for expansion and debt repayment.
- Urban Company IPO: opens Sept 10–12; ₹1,900 crore issue (₹472 cr fresh, ₹1,428 cr OFS); lot 145 shares; GMP ~₹10; proceeds for tech, leases, marketing.
- Jefferies' Ashish Jhaveri says India's startup IPO rush will quicken as markets deepen; fragmented investor exits suit listings over M&A, boosting block deals and pipeline.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	45,271.23 (▼ -0.05)
S&P 500	6,415.54 (▼ -0.69)
Nasdaq	21,279.63 (▼ -0.82)
Gift Nifty	24,812.00 (▲ 0.76)
Nikkei 225	41,938.89 (▼ -0.88)
Hang Seng	25,343.43 (▼ -0.60)

- PlatinumRx raises \$6M Series A led by Stellaris, with India Quotient; plans five new fulfilment centres, AI personalisation; serves 200k patients across 20k pincodes, saving 50–60%.
- WaterScience raises Rs 1.4 crore from Velocity to scale non-drinking water filtration, expand products and marketing; targets 3 million homes by FY26, citing 70% YoY growth.

## Business & Economic Updates:

- GST Council approves a simplified two-slab GST of 5% and 18%, effective September 22; a special 40% rate applies to luxury/sin goods, per sources and announcements.
- The government is planning measures to deal with illegal betting companies, which may involve scrutinizing shell companies.
- US Financial firm Jane Street has filed a petition with the Securities Appellate Tribunal (SAT) challenging a ruling from SEBI, the Indian market regulator.

### Macro Data

Brent Crude	\$67.6	(▼ -2.23)
Gold	₹106,410.00	(▲ 0.01)
Silver	₹124,100.00	(▼ -0.20)
Dollar Index	98.15	(▼ -0.17)
INR/USD	88.08	(▼ -0.10)
India 10Y Bond Yield	6.58	(▼ -0.15)
US 10Y Bond Yield	4.22	(▼ -0.94)

### Indian Market

BSE Sensex	80,567.71	(▲ 0.51)
NIFTY 50	24,715.05	(▲ 0.55)
BSE SENSEX 50	25,774.90	(▲ 0.55)
NIFTY NEXT 50	67,463.05	(▲ 0.66)
BSE SENSEX Next 50	83,347.41	(▲ 0.51)
NIFTY BANK	54,067.55	(▲ 0.76)
BSE BANKEX	60,450.18	(▲ 0.71)
NIFTY FINANCIAL SERVICES	25,732.55	(▲ 0.62)
BSE FINANCIAL SERVICES	12,227.25	(▲ 0.73)
NIFTY MIDCAP SELECT	12,773.60	(▲ 0.51)
BSE MIDCAP	45,780.69	(▲ 0.63)
INDIA VIX	10.93	(▼ -4.12)

- Banks have requested the Reserve Bank of India to reduce the issuance of long-term bonds, as there is weak demand from traditional buyers like insurers and pension funds.
- Prime Minister Modi has told CEOs that India is the most promising location for chip manufacturing, encouraging investment in the sector.
- India's Services Purchasing Managers' Index (PMI) has reached a 15-year high in August, driven by strong and robust customer demand, marking a continuous expansion for 49 consecutive months.
- Foreign Direct Investment (FDI) from the United States into India has seen a massive jump of 272%.
- Cabinet okays ₹1,500 crore scheme under NCMM to boost critical-mineral recycling via e-waste and LIB scrap, with capex/opex subsidies, targeting 270 KT capacity and 70,000 jobs.
- SEBI chief T K Pandey urges listed banks to tighten insider trading controls, safeguard UPSI of the bank and client companies and empower compliance officers; weak controls risk fraud.

## Geopolitical Updates:

- President Donald Trump sends a congratulatory message to Xi Jinping while also giving "warmest regards" to Putin and Kim Jong Un, suggesting a conspiracy against the United States.
- India is seeking swift progress on the Free Trade Agreement with the European Union, with German support expected to expedite the process.

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