

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,304.91
DII (Cash)	1,821.23
FII (Index Futures)	-520.20
FII (Stock Futures)	-96.65
FII (Index Options)	5,895.48
FII (Stock Options)	-625.02

Recent IPO Updates:

- Avaada Group, a Brookfield-backed company, is reportedly considering an initial public offering (IPO) for its solar cell unit that could raise up to \$1 billion.
- Chartered Speed files DRHP for an ₹855 crore IPO: ₹655 crore fresh issue, ₹200 crore OFS; proceeds for electric buses, debt repayment and general purposes; possibly ₹131 crore pre-IPO.

P.E. & Funding Updates:

- Healthtech startup Dectrocel raised ₹4 crore led by BioAngels, with PadUp Ventures and Vinnars; funds to scale DecXpert, enhance multimodal AI, expand globally; CDSCO-approved tool claims 98% accuracy.
- AutoDukan raised \$1 million pre-Series A led by Choice Group and HNIs; existing backers joined. Funds to scale AI-driven procurement, claims workflows and partnerships across key auto regions.
- FirstClub raised \$23 million Series A led by Accel and RTP Global at ₹1,050 crore valuation; funds to add 35 clubhouses, expand categories and scale quality-first operations.

Global Market Snapshot	
Dow Jones	45,621.29 (▲ 0.00)
S&P 500	6,502.08 (▲ 0.83)
Nasdaq	21,707.69 (▲ 0.98)
Gift Nifty	24,847.50 (▲ 0.08)
Nikkei 225	42,580.27 (▲ 0.00)
Hang Seng	25,058.51 (▲ 0.00)

Business & Economic Updates:

- The recent GST rate cuts on essential goods, reducing taxes from 12-18% to 5%, are expected to help lower inflation by 50-90 basis points over the next 12 months.
- The government has introduced a simplified GST registration scheme for small and low-risk businesses, allowing them to complete the process within three working days.
- SEBI has initiated an investigation into financial firm Jane Street following a series of complaints and allegations of market manipulation, a move that is currently being challenged in court.

Macro Data		
Brent Crude	\$66.99	(▲ 0.00)
Gold	₹108,120.00	(▲ 0.66)
Silver	₹124,520.00	(▼ -0.06)
Dollar Index	98.35	(▲ 0.08)
INR/USD	88.16	(▲ 0.00)
India 10Y Bond Yield	6.58	(▲ 0.00)
US 10Y Bond Yield	4.16	(▲ 0.00)

Indian Market		
BSE Sensex	80,718.01	(▲ 0.00)
NIFTY 50	24,734.30	(▲ 0.00)
BSE SENSEX 50	25,802.84	(▲ 0.00)
NIFTY NEXT 50	67,151.55	(▲ 0.00)
BSE SENSEX Next 50	82,945.18	(▲ 0.00)
NIFTY BANK	54,075.45	(▲ 0.00)
BSE BANKEX	60,480.39	(▲ 0.00)
NIFTY FINANCIAL SERVICES	25,853.40	(▲ 0.00)
BSE FINANCIAL SERVICES	12,245.22	(▲ 0.00)
NIFTY MIDCAP SELECT	12,738.80	(▲ 0.00)
BSE MIDCAP	45,504.35	(▲ 0.00)
INDIA VIX	10.78	(▼ -0.65)

- The recent GST rate overhaul, which simplifies tax slabs and reduces rates, is expected to encourage foreign portfolio investors (FPIs) to return to the Indian stock market.
- The opening of new demat accounts in India saw a slowdown in August, indicating a potential cooling off in retail investor interest in the stock market.
- Commerce and Industry Minister Piyush Goyal confirmed that India is in ongoing trade negotiations with the United States to finalize a bilateral trade agreement by November.
- Commerce and Industry Minister Piyush Goyal has stated that he will personally ensure that firms pass on the benefits of the recent GST rate cuts to consumers starting September 22.

Geopolitical Updates:

- US President Donald Trump stated that America had "lost India and Russia to deepest, darkest China" following their leaders' participation in the recent SCO summit.
- Brazilian President Luiz Inácio Lula da Silva has convened a virtual BRICS leaders' meeting to discuss a coordinated response to the recent tariffs imposed by the US.
- European leaders, including the German foreign minister, are urging India to use its relationship with Russia to help achieve peace in Ukraine.

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