

FII/DII Activity (in ₹crores)	
FII (Cash)	-2,169.35
DII (Cash)	3,014.30
FII (Index Futures)	9.20
FII (Stock Futures)	1262.1
FII (Index Options)	9,423.99
FII (Stock Options)	438.97

Recent IPO Updates:

- LG Electronics India has reportedly re-valued its operations lower, trimming its IPO size to Rs 10,000 crore from the earlier plan of Rs 15,000 crore.
- India's IPO market gains momentum with 53 mainboard IPOs in 2025, 84 companies cleared by SEBI, including LG Electronics and WeWork, raising up to ₹15,000 crore.

P.E. & Funding Updates:

- Misfits, India's first prebiotic soda brand, secured seed funding to scale production, expand distribution and launch new flavors targeting health-conscious consumers.
- Commercial refrigeration and foodservice company Trufrost & Butler has raised \$7 million in growth funding from Carpediem Capital to enhance customer experience, expand manufacturing and explore international markets.
- Venture Catalysts raised Rs 150 crore to expand leadership, launch new funds, upgrade AI-driven tech and grow geographically, backed by prominent investors including Bollywood families.
- ILJIN Electronics raised Rs 1,200 crore in its first institutional funding led by ChrysCapital for scaling operations, capacity and acquisitions in electronics manufacturing.
- Flipspaces raised \$50 million in Series C funding to expand in India, US, UAE, strengthen AI-powered technology and pursue acquisitions, totaling \$85 million.

Global Market Snapshot	
Dow Jones	45,514.95 (▲ 0.25)
S&P 500	6,481.50 (▼ -0.32)
Nasdaq	21,700.39 (▼ -0.03)
Gift Nifty	24,900.50 (▲ 0.24)
Nikkei 225	43,643.81 (▲ 1.45)
Hang Seng	25,633.91 (▲ 0.85)

Business & Economic Updates:

- India's chip mission, backed by a \$20 billion outlay, aims to establish a robust semiconductor ecosystem and reduce import dependence, with multiple fabrication and design facilities now under construction.

Macro Data		
Brent Crude	\$66.02	(▲ 0.79)
Gold	₹109,620.00	(▲ 1.89)
Silver	₹125,850.00	(▲ 1.76)
Dollar Index	97.46	(▼ -0.32)
INR/USD	88.27	(▲ 0.12)
India 10Y Bond Yield	6.52	(▲ 0.00)
US 10Y Bond Yield	4.04	(▼ -0.98)

Indian Market		
BSE Sensex	80,787.30	(▲ 0.09)
NIFTY 50	24,773.15	(▲ 0.13)
BSE SENSEX 50	25,836.05	(▲ 0.12)
NIFTY NEXT 50	67,366.05	(▲ 0.41)
BSE SENSEX Next 50	83,024.43	(▲ 0.20)
NIFTY BANK	54,186.90	(▲ 0.13)
BSE BANKEX	60,550.05	(▲ 0.08)
NIFTY FINANCIAL SERVICES	25,942.70	(▲ 0.21)
BSE FINANCIAL SERVICES	12,293.43	(▲ 0.22)
NIFTY MIDCAP SELECT	12,841.40	(▲ 0.49)
BSE MIDCAP	45,608.90	(▲ 0.33)
INDIA VIX	10.84	(▲ 0.56)

- UPI spending on digital goods, including gaming, dropped 26% in August to Rs 7,441.1 crore due to a new government ban on real-money gaming, as per NPCI data.
- India's literacy rate has risen to 80.9% from 74% in 13 years, but significant rural-urban and gender gaps persist, with some states lagging.
- Ujjivan Small Finance Bank plans to raise Rs 2,000 crore through a qualified institutional placement (QIP) over the next 18-24 months to support its expansion.
- Demat account openings slowed in August, with 2.6 million added. Total accounts reached 205 million, but unique investors are estimated at 130 million.
- India's weight in the MSCI EM index fell to 16.21%, a two-year low, as domestic equities lag, slipping India to third behind Taiwan.
- FMCG firms may be permitted to use stickers for price changes, passing lower GST rates to consumers post-September 22, pending official notification.

Geopolitical Updates:

- India and the European Union have commenced their latest round of Free Trade Agreement negotiations in New Delhi as India accelerates trade talks with multiple nations.
- At a recent BRICS meeting, India's External Affairs Minister, S. Jaishankar, urged member states to address trade deficits, noting that some of India's largest deficits are with BRICS partners.

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