

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,472.37
DII (Cash)	4,045.54
FII (Index Futures)	635.60
FII (Stock Futures)	-2774.89
FII (Index Options)	7,294.86
FII (Stock Options)	-430.04

Recent IPO Updates:

- JD Cables Limited's IPO is scheduled to open for subscription from September 18-22, 2025 with a total issue size of ₹95.99 crore.
- VMS TMT Limited, a TMT bar manufacturer, is launching its IPO from September 17-19, 2025, aiming to raise ₹148.50 crore through a fresh issue of shares.
- Tata Capital is preparing for an IPO in early October, aiming to raise ₹17,000 crore to comply with RBI regulations and fund its future lending growth.

P.E. & Funding Updates:

- BacAlt Biosciences raised Rs 18 crore to scale R&D, build pilot facilities and expand sustainable biotech ingredient production, led by Avaana Capital and Lubrizol InnoVentures.
- SnapE Cabs raised \$2.5 million to expand its profitable EV fleets, strengthen operations and support India's clean mobility vision, with over 1,000 cars deployed.
- Ember raised \$3.2 million to expand R&D, scale manufacturing and strengthen its premium toxin-free cookware presence in India, with Chef Saransh Goila joining as a partner.
- WeHouse raised Rs 25 crore to expand tech-driven home construction, enhance operational efficiency, upgrade technology and launch in Coimbatore and Ahmedabad, strengthening nationwide presence.

Global Market Snapshot	
Dow Jones	46,108.00 (▲ 1.36)
S&P 500	6,532.04 (▲ 0.30)
Nasdaq	21,886.06 (▲ 0.03)
Gift Nifty	25,111.50 (▲ 0.15)
Nikkei 225	44,372.50 (▲ 1.22)
Hang Seng	26,086.32 (▼ -0.43)

Business & Economic Updates:

- New demat account additions in India slowed to 24.8 lakh in August, a dip from the previous month, as cautious market sentiment cooled investor participation.
- Bankers believe that a combination of strong festive demand and recent GST rate cuts will help cushion the impact of new US tariffs on Indian exporters.

Macro Data		
Brent Crude	\$66.24	(▼ -1.85)
Gold	₹109,980.00	(▲ 0.82)
Silver	₹128,310.00	(▲ 2.97)
Dollar Index	97.53	(▼ -0.34)
INR/USD	88.46	(▲ 0.40)
India 10Y Bond Yield	6.5	(▲ 0.46)
US 10Y Bond Yield	4.03	(▼ -0.49)

Indian Market		
BSE Sensex	81,548.73	(▲ 0.15)
NIFTY 50	25,005.50	(▲ 0.13)
BSE SENSEX 50	26,086.09	(▲ 0.15)
NIFTY NEXT 50	67,974.70	(▲ 0.33)
BSE SENSEX Next 50	84,144.36	(▲ 0.13)
NIFTY BANK	54,669.60	(▲ 0.24)
BSE BANKEX	61,214.95	(▲ 0.35)
NIFTY FINANCIAL SERVICES	26,178.70	(▲ 0.21)
BSE FINANCIAL SERVICES	12,411.74	(▲ 0.13)
NIFTY MIDCAP SELECT	13,037.60	(▼ -0.03)
BSE MIDCAP	46,144.79	(▲ 0.14)
INDIA VIX	10.36	(▼ -1.71)

- Infosys has approved its largest-ever share buyback of ₹18,000 crore at a premium price, signaling the company's confidence in its future performance and cash flows.
- India's crude oil imports from Russia surged to 2 million barrels per day in August, a move that brings it close to China's import levels, despite US tariffs.
- The government has selected eight Indian companies that are building foundational AI models to receive incentives and subsidized GPU computing power under the IndiaAI Mission.
- Indian businesses have appealed to the RBI to implement measures that would help cushion the impact of US tariffs, with the central bank signaling its readiness to intervene.
- The Finance Ministry and Consumer Affairs Department are reviewing a circular that allows companies to revise the Maximum Retail Price (MRP) on unsold stock after GST rate cuts.
- Automakers have assured consumers that vehicles manufactured after 2023 are safe for use with E20 ethanol-blended fuel, addressing public concerns about performance and potential damage.
- India's external debt surged 10.1% to reach \$736.3 billion in the fiscal year 2024-25, marking the fastest annual growth rate in the last seven years.
- India has pledged a special economic package of \$680 million to Mauritius, which will fund key projects in infrastructure, healthcare and maritime security.
- India's share of the global smartphone market, by value, has risen to 7.9% in the first half of 2025, driven by increasing consumer demand for premium devices.

By
India IPO

- A new report forecasts that India's semiconductor market will almost double to \$103.5 billion by 2030, driven by the government's push to build a robust electronics ecosystem.
- The SEBI board is set to meet today to discuss a range of reforms, including relaxing minimum public offer rules for large companies to facilitate mega-IPOs.
- The Indian Rupee fell to an all-time low of 88.44, losing 34 paise against the US dollar on Thursday. The development came in the wake of massive demand for the greenback from importers and sustained foreign outflows.
- The Adani Group has ceased to berth vessels that are sanctioned by the European Union, the USA and the UK. The group issued the orders to the respective port authorities and vessels operating at high seas.

Geopolitical Updates:

- Right-wing conservative pundit and Trump loyalist Charlie Kirk was fatally shot while speaking at a campus event in Utah, as confirmed by police and media reports.
- India and the US have expressed satisfaction with the progress of bilateral trade talks, with Commerce Minister Piyush Goyal stating that negotiations on the initial phase are advancing well.
- India and Mauritius have agreed to begin trading in their respective national currencies, a move that is expected to strengthen financial ties and ease bilateral commerce.
- US State Secretary Marco Rubio stated that India is one of the United States' top global relationships, underscoring the strategic importance of the Indo-Pacific partnership.

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