

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	129.58
DII (Cash)	1,556.02
FII (Index Futures)	1,977.81
FII (Stock Futures)	1059.31
FII (Index Options)	8,573.63
FII (Stock Options)	-118.13

Global Market Snapshot	
Dow Jones	45,834.22 (▼ -0.59)
S&P 500	6,587.47 (▲ 0.00)
Nasdaq	22,043.07 (▲ 0.00)
Gift Nifty	25,211.50 (▲ 0.00)
Nikkei 225	44,372.50 (▲ 0.00)
Hang Seng	26,388.16 (▲ 1.16)

- Over a dozen companies are set to launch IPOs in the second half of September to raise nearly ₹10,000 crore, signaling a busy festive season for the primary market.
- The iValue InfoSolutions IPO opens on September 18 aiming to raise ₹560 crore through a complete offer for sale.
- Four major companies—Tata Capital, LG Electronics, Groww and Lenskart—are planning to launch IPOs worth up to \$5 billion between October and November.
- Two mainboards and five SME IPOs, including Infinity Infoway and JD Cables, will open for bidding this week; no listings are scheduled.
- SEBI approved Canara Robeco Asset Management Company's IPO, enabling a full offer-for-sale by Canara Bank and ORIX Corporation; no funds for AMC.
- Indian markets remain stable amid dovish US Fed signals, a booming data center sector and SEBI initiatives supporting market and IPO growth.
- Duroflex converted to a public company, preparing an IPO by 2026 with fresh equity and OFS; it competes with Wakefit and The Sleep Company.

## P.E. & Funding Updates:

- Indian startups raised over \$401 million from September 8-13, 2025, led by edtech Eruditus and several tech, biotech and mobility firms across diverse sectors.
- VC firm GVFL invested Rs 2 crore in Biokraft Foods, an Indian foodtech startup developing sustainable, cultivated meat using biotech and 3D bioprinting technology.
- Rooftop solar startup Zunroof raised Rs 25 crore led by Godrej Family Office, expanding AI-enabled solar and smart home solutions; losses narrowed despite revenue dip.

## Business & Economic Updates:

- New US tariffs have led to significant market volatility and FPI outflows, making it difficult for Indian exporters to regain lost market share and impacting the rupee's value.

Macro Data		
Brent Crude	\$66.91	(▲ 1.01)
Gold	₹109,800.00	(▲ 0.00)
Silver	₹128,710.00	(▲ 0.00)
Dollar Index	97.55	(▲ 0.02)
INR/USD	88.28	(▼ -0.20)
India 10Y Bond Yield	6.49	(▼ -0.15)
US 10Y Bond Yield	4.03	(▲ 0.00)

Indian Market		
BSE Sensex	81,904.70	(▲ 0.00)
NIFTY 50	25,114.00	(▲ 0.00)
BSE SENSEX 50	26,204.00	(▲ 0.00)
NIFTY NEXT 50	68,194.10	(▲ 0.00)
BSE SENSEX Next 50	84,299.58	(▲ 0.00)
NIFTY BANK	54,809.30	(▲ 0.00)
BSE BANKEX	61,445.90	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,363.25	(▲ 0.00)
BSE FINANCIAL SERVICES	12,476.08	(▲ 0.00)
NIFTY MIDCAP SELECT	13,083.05	(▲ 0.00)
BSE MIDCAP	46,184.30	(▲ 0.00)
INDIA VIX	10.12	(▲ 0.00)

- The threat of US tariffs on IT services is causing hiring freezes and slowing promotions in India's IT sector, as companies brace for a potential slowdown in outsourcing.
- The Centre may cap satcom subscribers per system and revise norms on spectrum allocation, pricing and capacity to protect telecom revenue and ensure fair competition.
- A new SEBI move to allow graduates from any stream to register as investment advisers is expected to boost the number of accredited investors and professional advisers.
- India's smartphone exports have crossed ₹1 trillion in the first five months of FY26, showcasing the success of the Production Linked Incentive (PLI) scheme.
- The Indian government is proposing a 20-year tax holiday for data center developers to boost investment and catalyze large-scale infrastructure development.
- The Ministry of Corporate Affairs (MCA) has made 'reverse flipping' easier by expanding fast-track merger rules, allowing more companies to re-domicile their foreign entities in India.
- India is exploring various financial models, including green bonds and blended finance, to attract the \$1.5 trillion needed to meet its climate and energy transition goals by 2030.

## Geopolitical Updates:

- Donald Trump has proposed that a NATO ban on Russian oil and new tariffs on China could end the Ukraine war by cutting off funding and pressuring Moscow's biggest ally.

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