

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	390.74
DII (Cash)	2,105.22
FII (Index Futures)	-604.20
FII (Stock Futures)	-659.86
FII (Index Options)	2,652.82
FII (Stock Options)	-448.11

- Chatterbox Technologies IPO, India's first pure influencer marketing firm listing, offers 37.27 lakh shares, with robust revenue and profit growth, targeting the SME platform.
- Zelio E-Mobility's ₹78 crore SME IPO aims to expand production, enhance R&D, repay debt and boost capacity to meet growing electric vehicle market demand.
- Infopark Kerala plans IPO after Phases III and IV, shifting to a corporate structure for growth, with metro extension and road connectivity proposals underway.
- Ecoline Exim Limited launches ₹76.42 crore IPO on NSE Emerge, raising funds for new manufacturing unit and growth, specialising in eco-friendly packaging and cotton bags.

Global Market Snapshot	
Dow Jones	46,142.42 (▲ 0.00)
S&P 500	6,631.96 (▲ 0.48)
Nasdaq	22,470.73 (▲ 0.94)
Gift Nifty	25,435.00 (▼ -0.31)
Nikkei 225	45,303.43 (▲ 0.00)
Hang Seng	26,544.85 (▲ 0.00)

## P.E. & Funding Updates:

- Equilibrium raised \$3 million in seed funding to expand nature-based carbon removal projects across India, engaging 150,000+ farmers for scalable, verifiable climate solutions.
- Bengaluru-based deeptech startup SpaceFields raised \$5 million pre-Series A to scale rocket propulsion manufacturing, secure certifications and support defence, aerospace sectors.
- EVamp Technologies raised Rs 7 crore to expand pan-India EV charger manufacturing and grow the Mobilane charging network, focusing on sustainable, innovative EV infrastructure solutions.

## Business & Economic Updates:

- India faces \$70 billion equity supply in 12 months, testing retail investor strength as frothy valuations, large IPOs and stake sales threaten market stability.

Macro Data	
Brent Crude	\$67.44 (▲ 0.00)
Gold	₹110,410.00 (▲ 0.26)
Silver	₹130,040.00 (▲ 0.95)
Dollar Index	97.35 (▼ -0.04)
INR/USD	88.14 (▲ 0.00)
India 10Y Bond Yield	6.49 (▲ 0.00)
US 10Y Bond Yield	4.11 (▲ 0.00)

Indian Market	
BSE Sensex	83,013.96 (▲ 0.00)
NIFTY 50	25,423.60 (▲ 0.00)
BSE SENSEX 50	26,530.77 (▲ 0.00)
NIFTY NEXT 50	69,334.30 (▲ 0.00)
BSE SENSEX Next 50	85,504.26 (▲ 0.00)
NIFTY BANK	55,727.45 (▲ 0.00)
BSE BANKEX	62,653.64 (▲ 0.00)
NIFTY FINANCIAL SERVICES	26,698.65 (▲ 0.00)
BSE FINANCIAL SERVICES	12,654.37 (▲ 0.00)
NIFTY MIDCAP SELECT	13,234.25 (▲ 0.00)
BSE MIDCAP	54,532.75 (▲ 0.00)
INDIA VIX	9.97 (▲ 0.81)

- The government will channel all funds for Centrally Sponsored Schemes through the RBI's e-kuber platform from November to ensure better tracking and "just-in-time" releases.
- Japan's R&I upgraded India's sovereign rating to BBB+ from BBB, citing strong economic growth, fiscal discipline and a resilient economy despite global headwinds.
- Amazon plans to triple its micro fulfilment centres in India to 300 by December as part of a ₹2,000 crore investment to boost its quick commerce and logistics network.
- The RBI governor is continuing to promote the internationalisation of the rupee. He urged the Clearing Corporation of India (CCIL) to focus on currency pairs beyond the dollar.
- Adani Group stocks surged, adding ₹66,000 crore in market cap, after SEBI dismissed key Hindenburg allegations, boosting investor confidence despite a choppy market.
- Evera Cabs proposes leasing 1,000 BluSmart electric cars, financed by PFC and IREDA, aiming for expansion and aiding lenders' recovery through the resolution process.
- The RBI has urged banks and financial institutions to review and reduce retail charges like minimum balance fees and late payment penalties to protect low-income customers.
- SEBI is expected to issue more orders on the Adani case, with allegations related to minimum public shareholding and insider trading still under review.
- India has received its third sovereign credit rating upgrade in FY26. The latest one is from Japan's R&I, reflecting the economy's resilience and fiscal strength.
- Trump's 50% tariffs on Indian goods led exporters to accelerate shipments; container freight rates halved, challenging smaller exporters and slowing North America shipments through FY25.

- India seeks major investments from the UAE in infrastructure, technology, green energy and startups, aiming to double non-oil trade to \$100 billion and expand bilateral partnerships.

## Geopolitical Updates:

- The government is satisfied with the progress of trade talks with the US. External Affairs Minister S. Jaishankar and US Secretary of State Marco Rubio have committed to intensifying efforts for a deal.
- Donald Trump and Xi Jinping have agreed to a summit in South Korea to advance talks on TikTok and manage escalating trade and technology tensions between the two nations.
- India is shifting its focus to striking individual FTAs with Gulf nations, like Oman and Qatar, instead of a bloc-wide agreement with the GCC.
- Chinese President Xi urged the US to lift trade barriers, praised the US WWII support and expressed optimism for resolving trade issues during a call with President Trump.
- India has raised concerns about threats from a Khalistani group against its consulate in Canada, with the MEA stating that the Canadian government must provide security.
- India and New Zealand are scheduled for their fourth round of FTA talks in October. Both countries are working to finalise a comprehensive trade and services agreement.
- The EU is considering an earlier ban on Russian LNG, pushing the effective date to 2027. This move is part of a broader sanctions package against Moscow's energy revenues.

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