

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-5,687.58
DII (Cash)	5,843.21
FII (Index Futures)	-3,589.38
FII (Stock Futures)	-1141.05
FII (Index Options)	6,773.22
FII (Stock Options)	423.17

Global Market Snapshot	
Dow Jones	45,947.32 (▲ 0.00)
S&P 500	6,604.72 (▼ -0.50)
Nasdaq	22,384.70 (▼ -0.50)
Gift Nifty	24,705.00 (▼ -1.02)
Nikkei 225	45,754.93 (▲ 0.00)
Hang Seng	26,484.68 (▲ 0.00)

- Tata Capital's ₹17,000 crore IPO is set to open on October 6, becoming India's largest public offering since Hyundai.
- KKR's Advanta targets \$500m IPO, with Sunshield Chemical and Deon Energy also filing, reflecting healthy listing intent in India's chemical and energy sectors.
- Renewable energy provider Deon Energy has filed a draft prospectus with SEBI for a ₹150 crore IPO to fund working capital and corporate purposes.
- Aarvee Engineering Consultants has filed draft papers with SEBI for a public offering that includes a fresh issue of ₹250 crore.
- GK Energy's shares listed at an 11.8% premium to its IPO price, with its shares rallying further in post-listing trade.
- The IPO for Jain Resource Recycling was oversubscribed 15.9 times on its final day, indicating strong investor demand.

P.E. & Funding Updates:

- Vedantu raised \$11 million led by Accel and ABC World Asia to expand categories, invest in AI and support secondary exits ahead of a targeted 2027 IPO.
- Curefoods raised Rs 160 crore from Binny Bansal's 3 State Ventures ahead of IPO; funds will aid expansion, debt repayment and working capital needs.
- Navo raised Rs 8 crore led by India Quotient to expand its AI-powered B2B fashion marketplace, helping tier-2, tier-3 retailers access and predict fashion trends.

Macro Data		
Brent Crude	\$69.42	(▲ 0.00)
Gold	₹114,360.00	(▲ 0.90)
Silver	₹142,170.00	(▲ 3.87)
Dollar Index	98.55	(▲ 0.10)
INR/USD	88.68	(▲ 0.00)
India 10Y Bond Yield	6.48	(▲ 0.00)
US 10Y Bond Yield	4.17	(▲ 0.00)

Indian Market		
BSE Sensex	81,159.68	(▲ 0.00)
NIFTY 50	24,890.85	(▲ 0.00)
BSE SENSEX 50	25,977.29	(▲ 0.00)
NIFTY NEXT 50	68,293.65	(▲ 0.00)
BSE SENSEX Next 50	83,787.88	(▲ 0.00)
NIFTY BANK	54,976.20	(▲ 0.00)
BSE BANKEX	61,965.97	(▲ 0.00)
NIFTY FINANCIAL SERVICES	26,247.40	(▲ 0.00)
BSE FINANCIAL SERVICES	12,450.57	(▲ 0.00)
NIFTY MIDCAP SELECT	12,822.30	(▲ 0.00)
BSE MIDCAP	45,641.47	(▲ 0.00)
INDIA VIX	10.78	(▲ 0.00)

- Recove raised Rs 5.3 crore led by Momentum Capital to expand its tech-driven B2B marketplace for plastic recyclables, boosting recycling infrastructure and circular economy efforts.

Business & Economic Updates:

- India's Ministry of External Affairs is monitoring the impact of new 100% tariffs imposed by the Trump administration on pharmaceutical imports.
- Major Indian stock market benchmarks have fallen by 6% from their record highs, reflecting a downturn in the market over the past year.
- The Indian government will borrow ₹6.77 lakh crore from the market in the second half of the fiscal year, slightly below its target.
- India's foreign exchange reserves declined by \$396 million to \$702.57 billion as of September 19, according to data from the RBI.
- BRICS NDB to issue the first rupee bond by March 2026, aiming to raise \$400-\$500 million, diversify funding and support rupee internationalization amid global de-dollarization trends.
- The Modi government highlights strong domestic demand as a key driver of India's economic growth, marking resilience despite global inflation and trade tensions pressures in 2025.
- Analysts are concerned about rising delinquencies in the microfinance and unsecured loan segments, which is stressing the industry.
- Increased gold demand in India is worsening rupee depreciation, as investors seek safe assets, complicating currency management amid trade and tariff headwinds.

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- A survey by the RBI revealed that Indian banks are expanding their global footprint, outpacing the overseas branches of foreign banks in India.
- The gold to Sensex ratio has reached its highest level since 2014, reflecting a preference for gold amid market volatility and economic uncertainty.
- Indian equity indices have fallen for the sixth consecutive session, driven by new US tariffs and concerns over H-1B visa fees.

Geopolitical Updates:

- India and the US are continuing discussions to finalize a bilateral trade agreement aimed at doubling trade to \$500 billion by 2030.
- Trump approved a \$14 billion deal for U.S. investors to acquire TikTok's U.S. operations, meeting security law requirements and ensuring American control with Chinese minority stake.
- Israeli Prime Minister Benjamin Netanyahu criticized several nations for their plans to recognize a Palestinian state, calling it a threat to Israel's existence.
- A delegation led by India's Commerce and Industries Minister, Piyush Goyal, has held constructive talks with US officials to discuss a bilateral trade agreement.

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