

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,188.57
DII (Cash)	3,405.90
FII (Index Futures)	-2,481.29
FII (Stock Futures)	-2622.3
FII (Index Options)	14,402.06
FII (Stock Options)	-60.77

- The Indian IPO market is targeting ₹30,000 crore in upcoming listings, signaling robust interest after a long period of listing volatility.
- Ameenji Rubber Limited announces INR 30 crore IPO plans to capture capital market opportunities, highlighting sectoral growth and manufacturing optimism.
- SK Minerals & Additive Limited launches an IPO of INR 41.15 crore, aiming to tap into investor appetite in the chemicals and minerals sector.
- Canara Robeco launches its IPO with strong investor demand of INR1,326.13 crore, aiming to expand its asset management offerings and bolster its presence in India's financial services industry.

Global Market Snapshot	
Dow Jones	46,519.72 (▲ 0.51)
S&P 500	6,715.35 (▲ 0.00)
Nasdaq	22,844.05 (▲ 0.00)
Gift Nifty	24,970.00 (▲ 0.00)
Nikkei 225	45,769.50 (▲ 1.85)
Hang Seng	27,140.92 (▼ -0.54)

P.E. & Funding Updates:

- Warburg Pincus will invest Rs 500 crore in Truhome Finance by October end, supporting growth, expansion and IPO preparations amid aggressive asset and branch expansion plans.
- Indian startups raised \$296 million across 18 deals, led by Hiranandani Financial Services, Kapiva, Recur Club and active funding in wellness, fintech, luxury and deeptech sectors.
- GryLabs AI secures \$10 million funding from Elevation Capital, strengthening India's AI startup ecosystem and boosting deeptech investments.
- Dhan achieves unicorn status with \$120 million raised, reflecting continued momentum in fintech funding despite broader capital market caution.
- Indian startups secure \$296 million in weekly funding; Housing Finance Corporation leads, signifying sustained investor confidence in India's innovative business ecosystem.
- Luxury watch brand Art of Time receives Rs 175 crore in fresh capital, highlighting transformation and expansion trends in India's high-end retail sector.

Macro Data		
Brent Crude	\$64.53	(▲ 0.66)
Gold	₹119,730.00	(▲ 1.31)
Silver	₹147,670.00	(▲ 1.35)
Dollar Index	97.72	(▼ -0.13)
INR/USD	88.78	(▲ 0.09)
India 10Y Bond Yield	6.53	(▲ 0.62)
US 10Y Bond Yield	4.12	(▲ 0.73)

Indian Market		
BSE Sensex	81,207.17	(▲ 0.28)
NIFTY 50	24,894.25	(▲ 0.23)
BSE SENSEX 50	26,005.10	(▲ 0.27)
NIFTY NEXT 50	68,355.90	(▲ 0.39)
BSE SENSEX Next 50	83,381.98	(▲ 0.34)
NIFTY BANK	55,589.25	(▲ 0.44)
BSE BANKEX	62,741.11	(▲ 0.54)
NIFTY FINANCIAL SERVICES	26,426.75	(▲ 0.17)
BSE FINANCIAL SERVICES	12,556.39	(▲ 0.29)
NIFTY MIDCAP SELECT	12,793.60	(▲ 0.75)
BSE MIDCAP	45,678.11	(▲ 0.78)
INDIA VIX	10.06	(▼ -2.24)

- Total funds launched for Indian startups reach \$9 billion in 2025, emphasizing a booming investment climate for innovation and entrepreneurship.
- Indian startups, including Kapiva and Petpooja, raised \$160 million in the past week, underscoring vibrant growth and sectoral diversification.

Business & Economic Updates:

- Private equity shifts focus from large buyouts to hospital IPOs, driven by increased healthcare investments over \$80 billion and renewed capital market interest in the sector.
- The Indian government is likely to restart the bank consolidation process by fiscal year-end, aiming to fortify banking sector stability and efficiency.
- A recent survey reveals that 40% buyers received full Goods and Services Tax benefits in week two, indicating improved compliance measures.
- Indian banks and regulators hold ₹1.84 lakh crore in unclaimed financial assets, highlighting the need for outreach and regulatory reforms.
- Equity investors increasingly rotate funds away from export-driven sectors, citing global uncertainty and domestic consumption-led opportunities.
- The Indian housing market displays renewed growth prospects, following three quarters of subdued activity as buyers reenter post-uncertainty.
- NSE amends lot sizes for benchmark indices Nifty, BankNifty, aiming to encourage retail participation and adjust risk appetite.
- Foreign portfolio investors believe Indian stocks will further decline before showing signs of recovery, citing international risk factors.
- Indian bank deposits haven't kept pace with advances after a brief respite, raising sector concerns over balance sheet
- Investors evaluate the merits of adding REITs as small-ticket options for asset diversification amid growing commercial real estate market opportunities.

growth and financial stability.

- Bitcoin price soars to an unprecedented \$125,000, fueled by institutional buying, robust demand and emerging macroeconomic uncertainty.
- Indian IT companies report ambiguous Q2 earnings, citing global demand volatility, currency headwinds and uncertain client spending trends.
- India intensifies efforts to ensure medical devices meet global safety, regulatory and acceptance standards for enhanced health sector exports.
- Russia continues as India's largest oil supplier, supported by favorable pricing, reliability and strategic partnership amid global energy market shifts.

Geopolitical Updates:

- India and the EU resume negotiations for a comprehensive trade agreement, eager to strengthen bilateral economic and regulatory cooperation.
- India and Qatar advance talks to finalize free trade agreement terms, boosting strategic and energy sector ties.
- Foreign Minister Jaishankar highlights India's intention to pursue FTAs with the EU and US promising expanded market access and trade diversification.
- India advocates a trilateral partnership with Japan and Australia to balance economic power against China and US dominance.
- President Trump's \$100,000 H-1B visa fee faces legal challenges, causing market debate on fairness and US employment policy implications.
- India and Australia signed three major defense agreements during Rajnath's visit, deepening strategic collaboration and regional security priorities.
- India resumes trade agreement negotiations with Chile and Peru, aiming to enhance bilateral economic ties and tap into the Latin American growth market.

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