

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-3,502.34
DII (Cash)	8,442.29
FII (Index Futures)	-3,984.75
FII (Stock Futures)	-2989.04
FII (Index Options)	18,223.49
FII (Stock Options)	212.99

- Wakefit also received SEBI's clearance for its IPO, combining a fresh issue worth INR 468 cr and Offer for Sale of 5.84 cr.
- Canara HSBC Life Insurance IPO opens on October 10, with an Offer for Sale of 23.75 crore shares by PNB and other promoters.
- Pace Digitek gained 4% on debut, reflecting investor optimism post-listing.
- Zappfresh IPO closed 1.4x oversubscribed, supported mainly by NIIs and QIBs.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	46,694.97 (▼ -0.14)
S&P 500	6,715.79 (▲ 0.01)
Nasdaq	22,780.51 (▼ -0.28)
Gift Nifty	25,166.00 (▲ 0.78)
Nikkei 225	47,944.76 (▲ 4.75)
Hang Seng	27,140.92 (▲ 0.00)

- JSW One Platforms raised ₹575 crore from SBI and other investors for technology scaling and logistics network growth in manufacturing supply.
- Hero Future Energies secured ₹1,908 crore funding led by SBI/Canara Bank for a major renewable energy hybrid project in Andhra Pradesh
- Hooraa, rejected by Shark Tank India, raised ₹5 crore seed capital for expanding its "Vehicle 360" platform in the auto-tech sector.
- Morphing Machines closed ₹38.36 crore Series A funding from IAN Alpha Fund to develop energy-efficient processor chips
- Navata raised ₹13.5 crore for a B2B last-mile logistics digital platform, supporting operational expansion across the country
- KGeN raised \$13.5 million for building a verified user protocol in AI, DeFi and gaming industries

Macro Data		
Brent Crude	\$65.47	(▲ 1.46)
Gold	₹120,440.00	(▲ 0.59)
Silver	₹147,740.00	(▲ 0.05)
Dollar Index	98.11	(▲ 0.40)
INR/USD	88.79	(▲ 0.01)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.15	(▲ 0.73)

Indian Market		
BSE Sensex	81,790.12	(▲ 0.72)
NIFTY 50	25,077.65	(▲ 0.74)
BSE SENSEX 50	26,180.85	(▲ 0.68)
NIFTY NEXT 50	68,590.25	(▲ 0.34)
BSE SENSEX Next 50	84,064.36	(▲ 0.82)
NIFTY BANK	56,104.85	(▲ 0.93)
BSE BANKEX	63,431.70	(▲ 1.10)
NIFTY FINANCIAL SERVICES	26,712.05	(▲ 1.08)
BSE FINANCIAL SERVICES	12,673.43	(▲ 0.93)
NIFTY MIDCAP SELECT	12,944.95	(▲ 1.18)
BSE MIDCAP	45,988.20	(▲ 0.68)
INDIA VIX	10.19	(▲ 1.29)

- EcoEx raised \$4 million to enhance its waste management technology and digital marketplace expansion.
- Aagama Ventures launched a ₹400 crore fund targeting innovative fintech startups in payments, lending and core infrastructure

## Business & Economic Updates:

- NITI Aayog CEO advocated for India's shift to higher-value exports, refocusing on Asian trading partners for sustained growth.
- Eli Lilly to invest \$1 billion in Telangana, setting up a major contract manufacturing facility for diabetes and obesity drugs
- India's pharma market is expected to grow 7–9% in FY26, led by chronic therapies and launches.
- boAt returned to profitability with ₹60 crore net profit in FY25, ahead of IPO plans.
- RBI proposed allowing banks to finance corporate acquisitions, potentially boosting M&A activity.
- Mutual Funds are on track for a record year of equity inflows, reflecting market confidence.
- Private banks' market cap fell during July–September 2025, per S&P Global Market Intelligence.
- SEBI removed 70,000+ misleading financial posts to curb misinformation.
- India Inc's Q2 FY26 profits expected to grow 6–7% YoY, led by muted demand and weaker banking results.

- BP projects India's oil demand to lead globally by 2050, accounting for 12% of global energy demand.
- Ola Electric became the first Indian two-wheeler EV maker certified for rare-earth-free ferrite motors.
- India's services PMI eased to 60.9 in September, signaling slightly slower growth.
- NBFC-MFI lending rates surged to 18–28%, reflecting high credit and asset-quality pressure.
- Jefferies is exploring entry into India's mutual fund market.
- IPO-bound Groww completed the Fisdom acquisition post-SEBI approval, boosting its fintech offerings in wealth management and advisory

## Geopolitical Updates:

- India–Qatar FTA expected to finalize by Q3 2026, with a goal of \$30 billion bilateral trade.
- Global instability underscores India's need for deeper economic integration with Asia.
- Israel– Hamas delegations commenced indirect ceasefire talks in Egypt, backed by the US.
- Ukraine's President Zelensky reported finding over 100,000 Western components in Russian military drones from a recent attack.

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