

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	1,308.16
DII (Cash)	864.36
FII (Index Futures)	544.56
FII (Stock Futures)	1452.5
FII (Index Options)	-258.08
FII (Stock Options)	570.87

- Zappfresh (DSM Fresh Foods) IPO raised approximately ₹59 crore. Zappfresh's IPO was oversubscribed 1.36 times.
- India ranked fourth globally, raising approximately \$14.2 billion (₹1.18 lakh crore) via IPOs in 2025.
- Midwest Ltd's IPO opens on October 15, 2025, raising ₹451 crore for quartz plant expansion and renewable projects, listing October 24.
- LG India's IPO attracted a record ₹4.4 trillion in bids, highlighting high demand and market confidence in the brand.

Global Market Snapshot	
Dow Jones	46,358.42 (▼ -0.52)
S&P 500	6,753.72 (▲ 0.58)
Nasdaq	23,043.38 (▲ 1.12)
Gift Nifty	25,260.00 (▲ 0.67)
Nikkei 225	48,580.44 (▲ 1.77)
Hang Seng	26,752.59 (▼ -0.29)

P.E. & Funding Updates:

- Electric mobility company Hala Mobility received Rs 30 crore via its Hala+ FOCO initiative, targeting fleet growth and technology advancement for urban transportation.
- AI startup Contrails AI closed a \$1 million funding round led by Huddle Ventures and IAN Group, planning for scaling artificial intelligence solutions.
- Food services firm Hunger Inc. raised Rs 215 crore in fresh funds, led by Lighthouse and DSG Consumer Partners, boosting growth initiatives.
- Global investor Prosus will acquire a 10.1% stake in travel tech firm ixigo for Rs 1,296 crore, deepening its digital footprint.
- Bira 91 is preparing to raise \$100 million to support its business revival plan, focusing on expansion and operational recovery.

Macro Data		
Brent Crude	\$65.22	(▼ -1.55)
Gold	₹120,550.00	(▼ -2.20)
Silver	₹145,760.00	(▼ -2.11)
Dollar Index	99.39	(▲ 0.56)
INR/USD	88.795	(▼ -0.01)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.14	(▲ 0.49)

Indian Market		
BSE Sensex	82,172.10	(▲ 0.49)
NIFTY 50	25,181.80	(▲ 0.54)
BSE SENSEX 50	26,292.14	(▲ 0.55)
NIFTY NEXT 50	68,520.25	(▲ 0.56)
BSE SENSEX Next 50	84,197.54	(▲ 0.61)
NIFTY BANK	56,192.05	(▲ 0.31)
BSE BANKEX	63,260.34	(▲ 0.33)
NIFTY FINANCIAL SERVICES	26,724.30	(▲ 0.25)
BSE FINANCIAL SERVICES	12,681.08	(▲ 0.33)
NIFTY MIDCAP SELECT	13,034.55	(▲ 0.96)
BSE MIDCAP	46,198.26	(▲ 0.75)
INDIA VIX	10.12	(▼ -1.84)

- Akasa Air's co-founder Aditya Khatri steps down just after the company secures ₹1,200 crore funding, amid management restructuring.

Business & Economic Updates:

- The Reserve Bank of India launched offline functionality for its Central Bank Digital Currency, allowing users to transact even without internet access.
- Flipkart divests a ₹2,400 crore investment, sharpening focus on its main operations and upcoming IPO plans for sustained market leadership.
- International neobank Revolut announced plans to invest INR 5,900 crore in India over five years, boosting fintech innovation and market expansion.
- Pharmaceutical stocks in India surged due to US plans to exempt generic drugs from tariffs, boosting export prospects.
- NPCI initiated a pilot project to enable UPI payments via ChatGPT, advancing India's digital payments landscape.
- The Indian government is not expected to increase its stake in Vodafone Idea beyond the current 49% holding.
- An integrated reporting system for brokers and exchanges will be introduced soon, improving regulatory efficiency.
- Nine new UK university campuses will soon be established in India, expanding higher education opportunities nationwide.

- Silver prices reached \$50/oz for the first time since 1980, sparking an investment frenzy and heightened market activity in India.
- Foreign Portfolio Investors (FPIs) have reduced holdings in the Indian health care by Rs 4,036 crore and the IT sector by Rs 4,521 crore due to policy changes in the United States.
- September recorded the largest fall in FPIs' equity assets in three years, reflecting cautious investor sentiment.

Geopolitical Updates:

- Prime Minister Modi and President Trump noted significant advances in ongoing trade negotiations between India and the US.
- India and the UK target doubling bilateral trade by 2030, with leaders expressing optimism about economic partnerships.
- An Afghan minister visited India, marking the first official visit in four years, signifying renewed diplomatic engagement.
- India and Australia sealed three defense agreements, deepening strategic cooperation and military collaboration.
- Israel and Hamas entered into a truce agreement over Gaza, aiming to ease regional tensions and humanitarian concerns.

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