

## Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	459.20
DII (Cash)	1,707.83
FII (Index Futures)	859.20
FII (Stock Futures)	1787.91
FII (Index Options)	9,977.05
FII (Stock Options)	292.43

- Tata Capital and LG Electronics' debuts will test the India IPO market as October could be the biggest month ever, with proceeds expected above \$5 billion.
- InCred Financial targets ₹4,000–5,000 crore IPO by October, blending a fresh issue and offer-for-sale to back expansion, with valuation pegged up to ₹22,500 crore.

## P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	45,479.60 (▼ -1.90)
S&P 500	6,735.11 (▲ 0.00)
Nasdaq	23,024.63 (▲ 0.00)
Gift Nifty	25,402.00 (▲ 0.00)
Nikkei 225	48,580.44 (▲ 0.00)
Hang Seng	26,290.32 (▼ -1.73)

- EQT dropped its plan to sell Zelestra's India renewable energy business. Instead, it will invest \$600 million, appointing Parag Sharma to head the new initiative.
- In a major boost, 26 Indian startups collectively raised \$285 million this week, with sectors ranging from fintech to SaaS and enterprise tech.
- Dezerv, a wealthtech startup, secured \$40 million in its Series B round. The funds will strengthen its technology and expand investment offerings.

## Business & Economic Updates:

- SEBI implemented stricter surveillance norms and margin rules in 2025 to curb market manipulation and protect retail investors as retail trading and derivatives bets surged.
- The government will soon unveil an interest subvention scheme, granting a 3% subsidy on export credit exclusively for MSMEs, to help offset global tariff shocks.
- Telecom companies in India called for the government to unify the regulations of satellite communications and over-the-top (OTT) services for industry clarity and fairness.

Macro Data		
Brent Crude	\$62.73	(▼ -3.79)
Gold	₹123,500.00	(▲ 1.53)
Silver	₹151,820.00	(▲ 3.36)
Dollar Index	98.98	(▼ -0.56)
INR/USD	88.7	(▼ -0.11)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.14	(▲ 0.00)

Indian Market		
BSE Sensex	82,500.82	(▲ 0.40)
NIFTY 50	25,285.35	(▲ 0.41)
BSE SENSEX 50	26,403.63	(▲ 0.42)
NIFTY NEXT 50	68,687.25	(▲ 0.24)
BSE SENSEX Next 50	84,638.21	(▲ 0.52)
NIFTY BANK	56,609.75	(▲ 0.74)
BSE BANKEX	63,872.58	(▲ 0.97)
NIFTY FINANCIAL SERVICES	26,842.25	(▲ 0.44)
BSE FINANCIAL SERVICES	12,748.70	(▲ 0.53)
NIFTY MIDCAP SELECT	13,149.55	(▲ 0.88)
BSE MIDCAP	46,362.29	(▲ 0.36)
INDIA VIX	10.1	(▼ -0.20)

- Ericsson is scaling its India operations to manufacture telecom equipment and invest in R&D, focusing on future 5G and 6G tech rollouts.
- Sify is leading India's link to Meta's global, high-speed "Waterworth" cable project, promising better data speeds and digital infrastructure.
- The government is reviewing the Black Money Act amid stakeholder concerns and may relax stringent clauses following parliamentary panel recommendations.
- France's OP Mobility will invest \$300 million, expanding into five new manufacturing plants and a technology hub to support India production.
- Balco has inaugurated India's largest aluminum smelter, boosting domestic output and supporting national self-reliance in metals.
- Global supply chains brace for US tariff actions on chips and rare earths, with ripple effects on India's electronics and auto sector competitiveness.
- Analysts project rising capex, strong earnings and foreign flows will fuel Indian stock market momentum for Samvat 2082, offsetting global headwinds.
- Ex-SEBI member Narayan cautioned against overreaction to recent market reforms, urging regulators to retain beneficial mechanisms while tightening checks.
- India's fashion tech startups, despite AI-led innovations, remain stuck at the seed stage. Investors worry about supply chain, scale and fragmented markets limiting major funding.

- SEBI chief stated simplifying KYC norms for NRIs is a crucial target to enhance investment flow to Indian markets.
- Amid global trade wars and tariff restrictions, Indian businesses are sharply increasing investment and partnerships in West Asia, exploring tech, energy and retail opportunities.

## Geopolitical Updates:

- Canadian FM Anita Anand is visiting India to boost diplomatic and economic ties, marking a reset after a period of strained relations. Meetings will focus on trade and strategic cooperation.
- India and the EU concluded their 14th round of FTA talks, targeting a final deal by December 2025 to deepen trade and investment ties across 23 policy areas.
- The Indian government is assessing the consequences of US-imposed tariffs on MSME exporters, considering support and advocacy for affected industries.
- Afghanistan's FM Muttaqi is scheduled to meet Indian industry groups to explore business cooperation despite regional instability.
- Prime Minister Narendra Modi discussed safe and ethical AI and tech innovation with Dario Amodei, CEO of leading US AI firm Anthropic.
- India is formally raising export barrier concerns with Russia to resolve trade bottlenecks in fertilizers, pharma and engineering goods, supporting bilateral commercial relations.

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