

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-240.10
DII (Cash)	2,333.42
FII (Index Futures)	-835.93
FII (Stock Futures)	-2501.69
FII (Index Options)	-1,538.83
FII (Stock Options)	181.84

- Lenskart's ₹8,000 crore IPO includes a ₹2,150 crore fresh issue and OFS, valuing it near ₹70,000 crore; FY25 profit ₹297 crore on ₹6,652 crore revenue.
- Tata Capital's ₹15,511.87 crore IPO valuing it at ₹1.4 trillion with robust institutional and retail participation.

P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	46,067.58 (▲ 1.29)
S&P 500	6,552.51 (▼ -2.71)
Nasdaq	22,204.43 (▼ -3.56)
Gift Nifty	25,306.50 (▼ -0.38)
Nikkei 225	48,088.80 (▼ -1.01)
Hang Seng	25,889.48 (▼ -1.52)

- Wealth-tech firm Dezerv secures \$40 Mn in a Series C round led by Premji Invest and Accel to expand its portfolio tech and hire 200 wealth managers.
- Artha India Ventures achieved the first close of Fund II at ₹250 crore to back early-stage climate tech and digital-first ventures pan-India.
- Emirates NBD is in advanced talks to acquire a controlling stake in RBL Bank for \$1.7 billion, signaling revived Gulf investment in Indian banking.
- Chara Technologies secured ₹52 crore to expand rare-earth-free motor production and scale up Bengaluru manufacturing facilities fivefold.
- Fintech startup GoodScore raised \$13 million in funding led by Peak XV Partners to fuel growth, hire talent and scale up its credit and analytics product suite.
- Agri-innovation firm Two Brothers Organic Farms raised INR 58.25 crore in Series B funding to boost production, brand reach and invest in farm community partnerships.
- Bengaluru-based AI startup smallest.ai secured \$8 million to develop advanced voice AI solutions for enterprises, focusing on reliability and privacy-first deployments globally.

Business & Economic Updates:

Macro Data		
Brent Crude	\$63.32	(▲ 0.94)
Gold	₹126,690.00	(▲ 2.58)
Silver	₹161,540.00	(▲ 6.40)
Dollar Index	99.28	(▲ 0.30)
INR/USD	88.68	(▼ -0.02)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.05	(▼ -2.17)

Indian Market		
BSE Sensex	82,327.05	(▼ -0.21)
NIFTY 50	25,227.35	(▼ -0.23)
BSE SENSEX 50	26,344.36	(▼ -0.22)
NIFTY NEXT 50	68,569.65	(▼ -0.17)
BSE SENSEX Next 50	84,646.05	(▲ 0.01)
NIFTY BANK	56,625.00	(▲ 0.03)
BSE BANKEX	63,944.34	(▲ 0.11)
NIFTY FINANCIAL SERVICES	26,885.25	(▲ 0.16)
BSE FINANCIAL SERVICES	12,774.48	(▲ 0.20)
NIFTY MIDCAP SELECT	13,186.95	(▲ 0.28)
BSE MIDCAP	46,277.19	(▼ -0.18)
INDIA VIX	11.01	(▲ 9.01)

- India's retail inflation cooled to 1.54% in September, driven by steep food price declines, marking the lowest rate in over eight years.
- MSMEs urged the extension of government-backed credit guarantee schemes as loan demand rises under collateral-free initiatives providing loans up to ₹100 crore.
- Flexicap mutual funds crossed ₹5 trillion in assets after ₹54,000 crore inflows this year, driven by investors' tilt toward diversified equity exposure.
- India's Big Four audit firms seek legal practice parity by regulatory reforms allowing multidisciplinary structures and easing foreign advisory restrictions.
- The RBI opened rupee-denominated lending channels to neighboring economies, aiming to promote regional financial integration and reduce dollar dependency.
- Credit growth continues to outpace deposit mobilization, raising liquidity concerns as loans expand rapidly amid sustained corporate and retail financing demand.
- ONDC introduced its "Financial Assistance 10.0" initiative to expand logistics provider participation and encourage digital supply chain strengthening under MSME inclusion.
- Google will invest ₹10 billion to build a 1GW AI and data center campus in Visakhapatnam, combining advanced computing and energy operations.
- Foxconn plans ₹15,000 crore investment in India for EV battery manufacturing, enhancing regional supply chain diversification.

- ONGC plans a global trading arm targeting \$1 billion profits by FY27 through managing crude, gas and petrochemical sales.

Geopolitical Updates:

- Indian officials visit the US this week to push bilateral talks aiming for a \$500 billion trade goal and tariff dispute resolution.
- Trade talks hit hurdles on steel and automobile tariffs, but progress on agriculture and services continues in Brussels negotiations.
- India urges the US to remove secondary tariffs linked to Indian exports tied to Russian oil amid ongoing negotiations.
- Following months of diplomatic strain, India and Canada outlined a roadmap for renewed engagement focusing on trade, skilled migration and supply chain collaboration.
- Indian policymakers emphasize independent strategic alignment, resisting binary influence from either the US or China in global trade and technology dialogues.

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