

FII/DII Activity (in ₹crores)

FII (Cash)	-1,508.53
DII (Cash)	3,661.13
FII (Index Futures)	-1,651.52
FII (Stock Futures)	-3887.55
FII (Index Options)	23,084.08
FII (Stock Options)	86.79

Global Market Snapshot

Dow Jones	46,270.46 (▲ 0.44)
S&P 500	6,654.72 (▲ 1.56)
Nasdaq	22,694.61 (▲ 2.21)
Gift Nifty	25,195.00 (▼ -0.44)
Nikkei 225	46,847.32 (▼ -2.58)
Hang Seng	25,441.35 (▼ -1.73)

Recent IPO Updates:

- Dronetech startup AVPL International has pre-filed a confidential DRHP for an IPO of INR 200 crore.

P.E. & Funding Updates:

- EIB Global committed up to \$60 million to the India Energy Transition Fund (targeting a size of \$300 million) to accelerate private capital investment in India's sustainable energy sector.
- Fery Rides, a women-led eco-mobility platform, raised ₹2.075 crore in seed funding led by IAN Angel Fund to expand its services.
- SpeakX.ai, an AI-powered English learning platform, secured \$16 million in a funding round led by WestBridge Capital to scale its AI stack and regional expansion.
- Bengaluru-based autonomous logistics firm Airbound raised \$8.65 million in seed funding and secured a pilot contract with Narayana Health for medical drone delivery.

Business & Economic Updates:

- TCS plans a major \$7 billion investment in a 1-gigawatt data center unit in India, a strategic shift that raises questions for analysts about its typical capex-light model.
- Google will invest \$15 billion over five years to build its first and largest AI hub outside the US in Visakhapatnam, India, featuring large-scale data centers.

Macro Data		
Brent Crude	\$62.39	(▼ -1.47)
Gold	₹126,980.00	(▲ 0.23)
Silver	₹160,430.00	(▼ -0.69)
Dollar Index	99.07	(▼ -0.21)
INR/USD	88.8	(▲ 0.14)
India 10Y Bond Yield	6.53	(▲ 0.00)
US 10Y Bond Yield	4.03	(▼ -0.49)

Indian Market		
BSE Sensex	82,029.98	(▼ -0.36)
NIFTY 50	25,145.50	(▼ -0.32)
BSE SENSEX 50	26,248.37	(▼ -0.36)
NIFTY NEXT 50	68,207.85	(▼ -0.53)
BSE SENSEX Next 50	84,092.31	(▼ -0.65)
NIFTY BANK	56,496.45	(▼ -0.23)
BSE BANKEX	63,718.43	(▼ -0.35)
NIFTY FINANCIAL SERVICES	26,828.30	(▼ -0.21)
BSE FINANCIAL SERVICES	12,732.39	(▼ -0.33)
NIFTY MIDCAP SELECT	13,035.10	(▼ -1.15)
BSE MIDCAP	45,934.43	(▼ -0.74)
INDIA VIX	11.16	(▲ 1.36)

- Foxconn invested \$31.8 million in equipment to locally manufacture the high-end iPhone 16 Pro series at its Tamil Nadu unit, marking a first for Apple outside China.
- The Supreme Court pursued responses from the Center and SEBI on Sahara's plea to sell its assets, including Aamby Valley City, to Adani Properties to raise money for investor refunds.
- The IMF upgraded India's 2025 GDP growth forecast to 6.6% from 6.4%, acknowledging strong first-quarter performance and structural reforms.
- India's wholesale inflation, measured by WPI, slowed to 0.13% in September from 0.52% in August, driven largely by lower food prices.
- LG Electronics' Global CEO announced India as the core of its Global South strategy, focusing on expanding manufacturing, exports, and local product portfolio.
- Driven by a growing high-net-worth population, India now ranks 6th globally in live branded residence projects, contributing 4% to the world supply.
- A global silver shortage has pushed Indian spot prices 5-10% above global rates, causing record-high margins on MCX as ETF subscriptions are suspended amid severe supply constraints.
- The bond market is receiving a boost as Indian states announced significantly lower-than-expected borrowing for the current quarter, easing supply concerns and supporting bond yields.

- India Post will resume all international postal services to the US from October 15, ending a two-month suspension caused by new US customs duty compliance requirements.
- NPCI International (NIPL) signed an MoU with NTT Data Japan to enable UPI acceptance across merchant locations in Japan, simplifying payments for Indian tourists.
- India's oil imports from Russia slipped 10% in the first eight months of 2025 due to narrowing discounts, but Russia remains the single largest supplier, accounting for 34% in September.

Geopolitical Updates:

- The US and China will impose reciprocal port fees on each other's ocean shipping firms, escalating the trade war into the global maritime industry.
- A joint statement confirms India and Mongolia's strengthened strategic partnership through cooperation in a \$1.7 billion oil refinery project, IT, and mineral resources.
- The Israeli Ambassador welcomed India's potential role in Gaza's post-conflict reconstruction and economic projects, calling India the "new builder of the world."
- US President Donald Trump praised India and its leader at the Gaza Peace Summit, again claiming his trade-based intervention helped settle India-Pakistan tensions.

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