

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	997.29
DII (Cash)	4,076.20
FII (Index Futures)	5,066.71
FII (Stock Futures)	463.02
FII (Index Options)	23,618.68
FII (Stock Options)	239.03

- India's food and beverage sector is preparing for Rs 9,000 crore worth of IPOs amid surging demand and investor confidence, driven by consumption growth and regional brands.
- Duroflex, an Indian mattress maker, filed draft IPO papers to raise ₹184 crore for expansion and debt repayment, aiming to increase manufacturing capacity.
- Groww, an Indian financial services platform, launched commodities trading ahead of its IPO, expanding services to retail investors with broader asset exposure.
- India's ₹600 crore IPO fees surged in October, benefiting bankers handling LG India and Tata Capital's listings during a busy festive season.
- Sihora Industries filed an IPO worth ₹10.56, listing on the BSE SME to expand textile manufacturing in Surat.

Global Market Snapshot	
Dow Jones	45,952.24 (▼ -0.65)
S&P 500	6,671.06 (▲ 0.40)
Nasdaq	22,670.08 (▲ 0.66)
Gift Nifty	25,643.00 (▲ 0.95)
Nikkei 225	48,277.74 (▲ 1.27)
Hang Seng	25,888.51 (▼ -0.09)

P.E. & Funding Updates:

- Indian quick commerce startup Zepto raised \$450 million, boosting its valuation to \$7 billion and securing \$900 million in cash reserves to expand dark stores.
- India-based AI startup FireAI raised ₹4 crore from Inflection Point Ventures to enhance enterprise AI analytics and customer automation.
- Bengaluru-based agriculture tech startup Fragaria Fruits secured \$4 million to scale vertical farming and R&D infrastructure.
- India-based AI gaming startup Airoclip raised \$2.75 million from TAC, Bitkraft and Centre Court Capital to advance AI personalisation in gaming.
- Consuma AI raised ₹12 crore in seed funding led by Equirus InnovateX for enterprise AI-powered customer analytics in India.
- Audio platform Kuku FM raised \$85 million to expand premium, celebrity-driven audio shows globally.

Macro Data		
Brent Crude	\$61.06	(▼ -1.37)
Gold	₹132,070.00	(▲ 3.03)
Silver	₹169,850.00	(▲ 3.36)
Dollar Index	98.36	(▼ -0.34)
INR/USD	87.83	(▼ -0.28)
India 10Y Bond Yield	6.51	(▲ 0.00)
US 10Y Bond Yield	3.97	(▼ -1.49)

Indian Market		
BSE Sensex	83,467.66	(▲ 1.04)
NIFTY 50	25,585.30	(▲ 1.03)
BSE SENSEX 50	26,714.67	(▲ 1.03)
NIFTY NEXT 50	69,453.20	(▲ 0.49)
BSE SENSEX Next 50	85,716.89	(▲ 0.53)
NIFTY BANK	57,422.55	(▲ 1.10)
BSE BANKEX	64,748.01	(▲ 1.27)
NIFTY FINANCIAL SERVICES	27,381.20	(▲ 1.14)
BSE FINANCIAL SERVICES	12,958.92	(▲ 0.74)
NIFTY MIDCAP SELECT	13,260.85	(▲ 0.75)
BSE MIDCAP	46,559.02	(▲ 0.29)
INDIA VIX	10.87	(▲ 3.23)

- Sensex and Nifty recorded the largest jump in four months after gains across sectors and positive market sentiment.

Business & Economic Updates:

- SEBI, India's capital markets regulator, is adopting quantum-safe computation systems to prevent cyberattacks and protect market integrity.
- RBI proposed direct supervision over EPFO and post office banks to strengthen oversight and align public fund management with monetary policies.
- Indian rupee surged 26 paise to 87.82 against the US dollar following RBI's \$5 billion market intervention, its highest level in a month.
- FMCG sector poised for growth as India's GST 2.0 reforms may significantly boost consumer spending.
- India's digital payments made up 8% of total payments via UPI, showcasing rapid fintech adoption.

Geopolitical Updates:

- India's Ministry of External Affairs rejected US President Trump's claim that PM Modi agreed to halt Russian oil imports, affirming India's energy priorities.
- India's Commerce Minister Piyush Goyal confirmed ongoing trade talks with the US, EU and Oman, aiming for tariff cuts and deeper supply-chain integration.
- India and Brazil aim to raise bilateral trade to \$20 billion by 2030, expanding preferential trade agreements under Mercosur.
- India calls for peace and diplomacy in the Middle East, condemning terror attacks, urging a ceasefire, humanitarian aid and a sustainable two-state Israel-Palestine solution.
- India seeks to expand trade pact with Mercosur and improve MSME export credit protections under central government initiatives.

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