

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	308.98
DII (Cash)	1,526.61
FII (Index Futures)	5,066.71
FII (Stock Futures)	463.02
FII (Index Options)	23,618.68
FII (Stock Options)	239.03

- Coca-Cola is exploring an IPO for its Indian bottler, Hindustan Coca-Cola Beverages (HCCB), to raise an estimated \$1 billion, assigning the unit a potential \$10 billion valuation.
- Data centre firm Sify Infinit Spaces filed a DRHP to raise ₹3,700 crore for expansion and debt, aiming to become the first listed data centre company in India.
- RK Damani and SBI MF acquired ₹200 crore in shares of Lenskart pre-IPO via secondary sale, diversifying their consumer tech portfolios.
- Om Power Transmission filed DRHP with SEBI for IPO worth 1 Cr to fund machinery, repay debt and meet working capital needs.

Global Market Snapshot	
Dow Jones	45,952.24 (▲ 0.00)
S&P 500	6,629.07 (▼ -0.63)
Nasdaq	22,562.54 (▼ -0.47)
Gift Nifty	25,756.00 (▲ 0.44)
Nikkei 225	48,277.74 (▲ 0.00)
Hang Seng	25,888.51 (▲ 0.00)

P.E. & Funding Updates:

- Audio-content platform Kuku FM secured \$85 million in Series D funding led by Granite Asia to expand regional languages and original content catalog .
- Sustainable brand Two Brothers Organic Farms raised ₹110 crore to expand global operations, boost manufacturing, and train farmers for export market growth .
- Thrasio-style aggregator GlobalBees is increasing its ownership in Dynamic IT Solutions by 15% to strengthen its tech- enablement portfolio and integration capacity .
- EaseMyTrip plans share-swap acquisitions in four travel-tech and hospitality firms valued at ₹169 crore to diversify beyond flight bookings and enter B2B segments .

Business & Economic Updates:

- Silver prices hit a record high of over ₹1.70 lakh/kg (₹170,415/kg and ₹179,000/kg were cited) on the MCX and in Delhi, straining supply contracts due to high industrial demand.
- The Central Board of Direct Taxes (CBDT) signed a record 174 Advance Pricing Agreements (APAs) in FY 2025, the highest ever, to boost tax certainty for multinational companies.

Macro Data		
Brent Crude	\$60.95	(▼ -0.18)
Gold	₹127,550.00	(▼ -3.42)
Silver	₹157,590.00	(▼ -7.22)
Dollar Index	98.34	(▼ -0.02)
INR/USD	87.83	(▲ 0.00)
India 10Y Bond Yield	6.51	(▲ 0.00)
US 10Y Bond Yield	3.97	(▲ 0.00)

Indian Market		
BSE Sensex	83,467.66	(▲ 0.00)
NIFTY 50	25,585.30	(▲ 0.00)
BSE SENSEX 50	26,714.67	(▲ 0.00)
NIFTY NEXT 50	69,453.20	(▲ 0.00)
BSE SENSEX Next 50	85,716.89	(▲ 0.00)
NIFTY BANK	57,422.55	(▲ 0.00)
BSE BANKEX	64,748.01	(▲ 0.00)
NIFTY FINANCIAL SERVICES	27,381.20	(▲ 0.00)
BSE FINANCIAL SERVICES	12,958.92	(▲ 0.00)
NIFTY MIDCAP SELECT	13,260.85	(▲ 0.00)
BSE MIDCAP	46,559.02	(▲ 0.00)
INDIA VIX	10.87	(▲ 0.00)

- Minister Piyush Goyal noted that trade pacts with Japan and Korea failed to significantly boost exports, with imports surging, prompting India to initiate a review of these agreements.
- Minister Nitin Gadkari announced that India's logistics costs are expected to fall to a single digit, around 9% of GDP, by December 2025 through infrastructure upgrades.
- AI is aiding healthcare via documentation and diagnostics, easing doctors' burden, but bias/accuracy concerns prevent immediate replacement.
- Sensex reached a 52-week high (above 84k) on a festive rally, driven by foreign fund inflows; FPIs bought ₹6,480 crore.

Geopolitical Updates:

- President Trump acknowledged his 100% tariffs on China might be unsustainable but are necessary due to China's control over rare earth minerals, hinting at potential trade negotiations.
- The US is reluctant to lower its 25% reciprocal tariff on India below the rates offered to competitors like Bangladesh without greater market liberalisation from India.
- India supports Afghanistan through humanitarian aid, medical projects and disaster relief, while reviving trade via the Chabahar corridor to promote regional stability and economic cooperation.
- The US Chamber sued the Trump administration over the new \$100,000 H-1B visa fee, calling the massive charge unlawful and anti-business.
- Indian and Central Asia NSAs met to discuss a plan to stabilise Afghanistan's Taliban regime and boost regional counter-terrorism and connectivity.

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