

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	96.72
DII (Cash)	-607.01
FII (Index Futures)	57.52
FII (Stock Futures)	427.29
FII (Index Options)	-4,076.14
FII (Stock Options)	-123.56

- SEBI approved Shadowfax's Rs 2,500 crore IPO; the company targets a post-issue valuation of around Rs 8,500 crore to expand its e-commerce delivery network across 500+ cities.
- Meesho filed updated draft papers with SEBI for a Rs 4,250 crore IPO, valuing the company near Rs 52,000 crore (approx. \$6.3 billion).
- NSE IPO expected in Samvat 2082, valuation estimated above Rs 2 lakh crore; SEBI approval pending as Ashishkumar Chauhan confirms regulatory progress.

P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	46,590.41 (▼ -0.71)
S&P 500	6,735.35 (▲ 0.00)
Nasdaq	22,953.67 (▼ -0.16)
Gift Nifty	26,288.00 (▲ 1.41)
Nikkei 225	49,307.79 (▼ -0.02)
Hang Seng	25,781.77 (▼ -0.94)

- Uniphore secured \$260 million in Series F led by NVIDIA, AMD, Snowflake and Databricks, valuing the company at \$2.5 billion to scale AI enterprise automation.
- Wonderland Foods raised Rs 140 crore in its maiden round to boost product development and market expansion in the food processing sector.
- Indian startups raised over \$704 million in investments, with quick commerce unicorn Zepto leading the surge in early and growth-stage financing.
- UnifyApps raised \$50 million in Series B led by WestBridge Capital, appointing Ragy Thomas co-CEO; valued at \$200 million post-money for AI platform scaling.
- India Quotient closed Fund V at \$129 million, focusing on early-stage investments in SaaS, fintech and consumer internet startups in India.

Business & Economic Updates:

- India looks to deepen trade and economic partnership with Germany during Piyush Goyal's official visit, marking 25 years of strategic partnership.
- India's processed potato exports surged 450% in three years, driven by demand from the West and Southeast Asia.
- Smartphone sales in India grew 3% to 48.4 million units in July-August 2025, with Vivo leading market share and Apple re-entering the top five.
- Eternal received an INR 128 Cr GST demand and penalty notice, indicating regulatory scrutiny.

Macro Data		
Brent Crude	\$62.59	(▲ 2.07)
Gold	₹122,970.00	(▼ -4.13)
Silver	₹146,420.00	(▼ -2.59)
Dollar Index	98.9	(▼ -0.06)
INR/USD	87.94	(▲ 0.13)
India 10Y Bond Yield	6.52	(▲ 0.31)
US 10Y Bond Yield	3.95	(▼ -0.50)

Indian Market		
BSE Sensex	84,426.34	(▲ 0.07)
NIFTY 50	25,868.60	(▲ 0.10)
BSE SENSEX 50	24,292.01	(▼ -9.97)
NIFTY NEXT 50	69,519.65	(▲ 0.10)
BSE SENSEX Next 50	86,003.90	(▲ 0.05)
NIFTY BANK	58,007.20	(▼ -0.04)
BSE BANKEX	65,365.57	(▼ -0.02)
NIFTY FINANCIAL SERVICES	27,536.85	(▲ 0.11)
BSE FINANCIAL SERVICES	13,070.59	(▲ 0.15)
NIFTY MIDCAP SELECT	13,231.75	(▼ -0.01)
BSE MIDCAP	46,787.20	(▲ 0.23)
INDIA VIX	11.3	(▼ -0.53)

- Increased investor interest amid volatile gold prices; RBI gold reserves crossed 880 tonnes by September 2025.
- Small finance banks seek a loan size cap doubling to ₹50 lakh, to expand MSME credit and co-lending.
- Revised guidelines to develop India's indigenous "Big Four" audit firms, aiming to reduce foreign dominance.
- WACR is better aligned with RBI's repo rate, showing improved monetary transmission.
- Private banks reduced lending rates faster than PSBs, supporting loan demand.
- UPI volumes hit record highs in October 2025, boosted by GST rate cuts and festive digital spending.
- Participatory notes (P-notes) market set for gradual decline due to stricter compliance.
- New regulatory measures for AI deepfakes are imminent, mandating labels and metadata tracking.
- Government to strengthen MSME support schemes and credit guarantees to boost productivity in manufacturing hubs.

Geopolitical Updates:

- Trump and Modi held trade talks amid efforts to repair ties and finalise bilateral trade deals, with a focus on lowering US tariffs on Indian exports.
- Modi and Trump discussed trade and oil issues; the India-US deal nears the final stage, but political challenges may delay the announcement.
- Trade differences persist between India and the EU after the 14th round of negotiations, especially on market access and sustainability terms.
- Russia held large-scale nuclear drills with intercontinental missile launches after the US postponed the Putin-Trump summit on Ukraine.
- Sweden confirmed it would supply Gripen fighter jets to Ukraine, adding tension around Russia's Baltic operations.

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