

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,165.94
DII (Cash)	3,893.73
FII (Index Futures)	4,652.22
FII (Stock Futures)	8,139.62
FII (Index Options)	8,450.97
FII (Stock Options)	1,640.87

- Orkla India's ₹1,600 crore IPO launch will be at the end of October to fund expansion in India's food sector, capitalising on strong investor sentiment and premium consumer trends.
- Rayzon Solar received SEBI approval for its ₹1,500 crore IPO, with plans to finance new solar projects and expand into diverse renewable energy markets across India.
- Avaada Electro confidentially filed IPO papers with SEBI, potentially targeting a ₹9,000-10,000 crore raise for smart grid and clean energy expansion, boosting green sector listing interest.
- Jio's strong broadband growth momentum, despite fewer mobile additions, bolsters confidence for its upcoming IPO, supported by the telecom sector's bullish view on digital infrastructure.

P.E. & Funding Updates:

Global Market Snapshot	
Dow Jones	46,734.61 (▲ 0.31)
S&P 500	6,699.40 (▼ -0.53)
Nasdaq	22,740.40 (▼ -0.93)
Gift Nifty	26,012.00 (▼ -1.05)
Nikkei 225	48,641.61 (▼ -1.35)
Hang Seng	25,967.98 (▲ 0.72)

- India's private equity achieved a record \$2.9 billion from 42 deals, focusing on technology, fintech and renewable sectors, defying global market volatility.
- Delhi NCR healthy food brand Wonderland Foods secured ₹140 crore from Asha Ventures to expand its product line, indicating strong growth in India's healthy food sector.
- A major investor divested ₹7.4 crore worth of ArisInfra shares, potentially signalling sectoral churn as market sentiment adjusts for infrastructure and real estate.
- Venture investments decreased in the September quarter, yet India's exit activity hit a seven-year high, signifying mature fund cycles and numerous successful liquidity events.

Business & Economic Updates:

- Delhi's artificial rain is set for Oct 29 to fight air pollution, a scientific approach using cloud seeding to improve air quality in the city.
- The Sensex crossed 85,000 but declined due to fears of US sanctions potentially impacting major Indian PSU stocks.
- India's potato export revenue grew 450% in four years, fueled by improved logistics and high global demand for processed products in Asia.

Macro Data		
Brent Crude	\$65.99	(▲ 5.43)
Gold	₹123,790.00	(▲ 0.67)
Silver	₹147,400.00	(▲ 0.67)
Dollar Index	98.93	(▲ 0.03)
INR/USD	87.85	(▼ -0.10)
India 10Y Bond Yield	6.51	(▼ -0.15)
US 10Y Bond Yield	4.01	(▲ 1.52)

Indian Market		
BSE Sensex	84,556.40	(▲ 0.15)
NIFTY 50	25,891.40	(▲ 0.09)
BSE SENSEX 50	27,027.52	(▼ -0.04)
NIFTY NEXT 50	69,434.35	(▼ -0.12)
BSE SENSEX Next 50	85,976.32	(▼ -0.03)
NIFTY BANK	58,078.05	(▲ 0.12)
BSE BANKEX	65,597.93	(▲ 0.36)
NIFTY FINANCIAL SERVICES	27,556.65	(▲ 0.07)
BSE FINANCIAL SERVICES	13,083.14	(▲ 0.10)
NIFTY MIDCAP SELECT	13,204.55	(▼ -0.21)
BSE MIDCAP	46,716.22	(▼ -0.15)
INDIA VIX	11.73	(▲ 3.81)

- Silver ETF prices fell over 20% in one week from their peak, signalling a shift in investor sentiment and market correction for for the metal.
- State Bank of India (SBI) won two global financial awards, enhancing its international profile in modern digital banking services.
- SEBI plans to relax the geo-tagging rule for NRI clients during Re-KYC, easing foreign investor participation in India's capital markets.
- Amazon India cut its FY25 losses significantly by reducing costs, showing improved operational efficiency and moderate revenue growth in the e-commerce giant's Indian business.
- BSE maintains a dominant market share in options volumes despite regulatory changes to contract expiry, indicating continued trader preference for its products.
- A compact MSME credit insurance scheme, with a 100% guarantee, is likely by Q4 to enhance financing and support the growth of Indian enterprises.
- RBI is increasing its gold reserves to \$102.3 billion over dollar assets for strategic diversification, providing security and a hedge against global financial uncertainty for India.
- Indian IT and textile stocks surged following reports of potential Indo-US trade deals involving significant tariff cuts for Indian exports.

Geopolitical Updates:

- US sanctions forced Reliance and India's PSUs to suspend Russian oil imports, risking a \$2.7 billion loss of India from costlier energy supply changes.
- PM Modi will attend Malaysia's ASEAN summit virtually, continuing India's regional diplomacy due to Deepavali.
- Canadian PM Carney may visit India for an AI summit, potentially boosting bilateral technology and trade relations.
- India and Bhutan officials discussed enhanced border management, including security and cross-border movement, in a recent meeting.

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