

**FII/DII Activity (in ₹crores)**

FII (Cash)	-6,769.34
DII (Cash)	7,068.44
FII (Index Futures)	-1,611.57
FII (Index Options)	10,111.91
FII (Stock Futures)	-941.35
FII (Stock Options)	617.97

Global Market Snapshot

Dow Jones	47,522.12	(▲ 0.00)
S&P 500	6,822.34	(▲ 0.00)
Nasdaq	23,581.14	(▲ 0.00)
Gift Nifty	25,900.00	(▲ 0.01)
Nikkei 225	51,325.61	(▲ 0.00)
Hang Seng	25,906.65	(▼ -1.43)

Macro Data

Brent Crude	64.77	(▲ 0.62)
Gold	122,000.00	(▲ 0.30)
Silver	149,630.00	(▲ 0.53)
Dollar Index	99.8	(▲ 0.27)
INR/USD	88.78	(▲ 0.08)
India 10Y Bond Yield	6.57	(▲ 0.61)
US 10Y Bond Yield	4.1	(▲ 0.00)

Indian Market

BSE Sensex	83,938.71	(▼ -0.55)
NIFTY 50	25,722.10	(▼ -0.60)
BSE SENSEX 50	26,866.61	(▼ -0.56)
NIFTY NEXT 50	69,824.75	(▼ -0.37)
BSE SENSEX Next 50	86,577.98	(▼ -0.53)
NIFTY BANK	57,776.35	(▼ -0.44)
BSE BANKEX	64,936.05	(▼ -0.55)
NIFTY FINANCIAL SERVICES	27,138.85	(▼ -0.87)
BSE Financial Services	12,960.15	(▼ -0.69)
NIFTY MIDCAP SELECT	13,467.85	(▲ 0.00)
BSE MidCap	47,044.59	(▼ -0.55)
India VIX	12.15	(▲ 0.66)

Recent IPO Updates:

- Shadowfax Technologies filed a confidential draft IPO to raise ₹2,000 crore, aiming to expand logistics capacity and growth.
- Textile manufacturer Shreeji Global plans to raise ₹85 crore through an IPO opening on November 4. The funds will be used for expansion and working capital.
- Avaada Electro files ₹10,000 crore DRHP backed by Brookfield for solar manufacturing, renewable energy expansion.
- OYO's parent PRISM increased authorized share capital from ₹2,431 crore to ₹2,433 crore ahead of IPO, targeting a valuation of \$7-8 billion in 2025.
- Pine Labs filed its DRHP to raise ₹2,080 crore via a fresh issue, targeting expansion of payment infrastructure and global digital commerce.
- Epsilon Carbon, India-based, signed a \$20 million pact with Bahrain's Alba, aiming for an IPO by late 2027 to expand international scope in carbon products.
- SBI Mutual Fund invested ₹100 crore pre-IPO in Lenskart, signaling confidence in expanding into Tier-II markets and introducing new products.

P.E. & Funding Updates:

- VC funding down 30% YoY in Q3 2025 as investors focus on selective exits and sharper strategies.
- Goyaz raised ₹130 crore from Norwest Venture Partners to expand gold-plated silver jewelry retail presence, enhance design, manufacturing and omnichannel operations across India.
- PointAI secured ₹47 crore funding to scale AI-powered virtual product try-ons, expanding collaborations with fashion and beauty brands.
- Jupiter raised ₹115 crore from existing investors to enhance its digital banking suite, launch credit products and deepen its financial inclusion efforts.

- SaveSage raised \$1 million in pre-seed funding to develop AI-driven personal finance tools focused on budgeting, savings automation and millennial customer acquisition.

Business & Economic Updates:

- Startups are targeting Southeast Asia, including tech hubs like Ho Chi Minh City, as the next growth markets due to an innovation and funding surge.
- India plans to triple the rare earth magnets incentive to ₹70 billion to build domestic supply chains and reduce China's dependence. Several global suppliers showed interest.
- FPO Platform for India launched a digital network for farmers' producer organizations, connecting them with buyers, logistics and investors to boost rural supply chains.
- SEBI launched a rural financial literacy program across six states to educate panchayats on investments and financial planning for equity markets.
- A new AI law in India is being developed, modeled on the IT Act, focusing on AI regulation, labeling and accountability measures.
- SEBI caps HDFC, ICICI participation at 20% in public issues, boosting smaller banks' market access and competition.
- October GST collections rose 4.6% YoY to ₹1.96 lakh crore; F&O turnover hits one-year high with festive momentum.
- India emerges as a global skills hub, projected to be the third-largest economy by 2027, driven by resilience and growth fundamentals.
- India's UPI transactions surged to an all-time high of 20.7 billion in October, reflecting robust festive spending, digital adoption and strong fintech ecosystem momentum nationwide.
- HDFC Bank's shares rise on RBI nod to divest Credila stake, unlocking post-merger value.
- Indian IT firms cut H-1B reliance, boosting local hiring in the US amid rising visa costs; TCS leads with 50% US local hires.
- India's exports to the US dip 37.5% May-Sep 2025, affected sectors include pharma, metals and gems, as tariffs impact competitiveness.
- The Reserve Bank of India said ₹2,000 notes worth ₹5,817 crore are still in circulation after withdrawal, with over 97 percent already returned to banks.
- Foreign portfolio investors pumped the highest funds in seven months into Indian government bonds, reflecting confidence in fiscal stability and global index inclusion prospects.

- The Indian government plans talks with automakers and researchers to explore rare-earth-free electric motor technologies, aiming to reduce import dependence and boost domestic green tech innovation.
- Non-trade challenges such as data localization, compliance standards and digital tax frameworks are taking center stage as key negotiation deadlines approach in multiple bilateral agreements.
- ISRO achieved a milestone with the successful launch of its heaviest communication satellite, enhancing India's broadband and telecom capabilities and supporting future space-based services.
- Indian Finance Minister Nirmala Sitharaman said the Indian economy remains resilient and capable of absorbing global shocks, emphasizing robust macroeconomic stability and continued confidence in India's long-term growth.

Geopolitical Updates:

- The US government shutdown has entered its second month with an estimated economic loss between \$7 billion and \$14 billion.
- EAM Jaishankar stresses strengthening India's ties with Cyprus and the EU, emphasizing trade, maritime and tech partnerships.
- Jaishankar urges India-Germany collaboration to stabilize global order, focusing on trade, tech and democratic alliances.
- Rajnath Singh advocates collective Indo-Pacific security cooperation amid growing regional challenges.
- Israeli Foreign Minister Gideon Sa'ar visits India to discuss technology, defence and regional cooperation ahead of PM Netanyahu's proposed visit.
- US government shutdown extends second month, disrupting operations and increasing economic uncertainty amid political gridlock.

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