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13-12-2025
Saturday

DAILY REPORTER

By
India IPO

Recent IPO Updates:

- Blackstone-backed Horizon Industrial Parks plans an IPO of up to \$500 million, funding logistics asset expansion amid strong investor appetite for warehousing plays.
- Nephrocare Health Services' ₹871cr IPO was subscribed 13.96 times, driven by strong QIB and HNI demand, underscoring buoyant interest in healthcare listings.
- Park Medi World's ₹920-cr hospital IPO closed about 8.1 times subscribed, reflecting robust institutional and retail demand for North-India healthcare assets.
- IPO for ICICI Prudential Mutual Fund was subscribed 72% on its first day, indicating a moderately positive investor interest upon launch.
- Energy-transition player Eastman Auto and Power confidentially filed DRHP with SEBI for a ₹1,800–2,000 cr IPO, combining fresh issue and OFS to fund expansion.
- Premium alcoholic-beverage firm Aspri Spirits filed DRHP with SEBI on Dec 11, 2025, aiming to repay debt and fund growth plans.
- More Indian companies are adopting SEBI's confidential DRHP option, using non-public drafts to fine-tune timing, disclosures and valuation, mirroring US-style flexibility in IPO preparation.

P.E. & Funding Updates:

- Brookfield will invest about \$1 billion to develop a 2-million-sq-ft Mumbai office complex, anchored by a global bank GCC and expected to generate large-scale jobs in India.
- Shark Tank India-featured Toffee Coffee Roasters raised ₹5 cr pre-Series A led by Inflection Point Ventures to fund working capital, roastery expansion, packaging upgrades and new product development.

Business & Economic Updates:

- The government announced major reforms in the nuclear sector, though private companies may still be restricted from uranium mining to maintain strategic state control.
- The Cabinet Committee on Economic Affairs has approved 100% FDI in the insurance sector to attract global capital and deepen market penetration.

FII/DII Activity (in ₹crores)

FII (Cash)	-1,114.22
DII (Cash)	3,868.94
FII (Index Futures)	-657.86
FII (Index Options)	6,366.25
FII (Stock Futures)	738.18
FII (Stock Options)	174.7

Global Market Snapshot

Dow Jones	48,704.01	(▲ 0.00)
S&P 500	6,901.00	(▲ 0.21)
Nasdaq	23,593.86	(▼ -0.25)
Gift Nifty	26,138.50	(▲ 0.43)
Nikkei 225	50,148.82	(▲ 0.00)
Hang Seng	25,530.51	(▲ 0.00)

Macro Data

Brent Crude	61.28	(▲ 0.00)
Gold	133,800.00	(▲ 0.77)
Silver	192,440.00	(▼ -2.70)
Dollar Index	98.35	(▲ 0.02)
INR/USD	90.38	(▲ 0.00)
India 10Y Bond Yield	6.61	(▼ -0.30)
US 10Y Bond Yield	4.16	(▲ 0.00)

Indian Market

BSE Sensex	84,818.13	(▲ 0.00)
NIFTY 50	25,898.55	(▲ 0.00)
BSE SENSEX 50	27,029.63	(▲ 0.00)
NIFTY NEXT 50	67,939.50	(▲ 0.00)
BSE SENSEX Next 50	85,901.41	(▲ 0.00)
NIFTY BANK	59,209.85	(▲ 0.00)
BSE BANKEX	66,462.48	(▲ 0.00)
NIFTY FINANCIAL SERVICES	27,561.90	(▲ 0.00)
BSE Financial Services	13,086.42	(▲ 0.00)
NIFTY MIDCAP SELECT	13,728.05	(▲ 0.00)
BSE MidCap	45,951.46	(▲ 0.00)
India VIX	10.4	(▲ 0.00)

- The government is considering stricter technical and localisation norms for the 10 GWh battery-storage programme to ensure quality, grid reliability and domestic manufacturing depth.
- SEBI is exploring a more calibrated penalty framework for listed companies, including lower fines for minor breaches, to encourage better compliance without stifling business.
- Proxy advisory firm IiAS has flagged governance and oversight issues at IndiGo, bringing promoter Rahul Bhatia and the board under closer shareholder scrutiny.
- Escalating healthcare, insurance and compliance costs are prompting Indian companies to redesign employee-benefit structures, focusing on cost-sharing, flexibility and targeted wellness offerings.
- The Union Cabinet has sanctioned ₹11,718 cr to conduct the long-delayed Census exercise, ensuring updated demographic data for national planning and policy-making.
- November's retail inflation rose slightly to 0.7%, a historically low figure, driven by continuing falls in food prices, indicating a stable inflationary environment.
- Telecom companies have requested the government to rationalize spectrum valuation to ensure fair pricing, industry viability and sustainable investment in network infrastructure.
- The government has allowed coal acquired through auctions to be used for any purpose, removing end-use restrictions to improve flexibility and efficiency in utilization.
- IBBI is considering giving MSME dues higher priority under IBC waterfalls, potentially improving recoveries for small suppliers in corporate insolvency resolutions.
- The Finance Ministry will rank banks and insurers on grievance handling quality and timeliness to strengthen customer service, accountability and turnaround time in BFSI.
- IndiGo has engaged an international aviation operations expert to investigate recent large-scale flight disruptions and recommend measures to improve reliability and scheduling.
- Wipro is expanding its Google Cloud partnership to roll out AI solutions at scale for global clients, targeting productivity gains, modernization deals and new revenue streams.
- Microsoft is positioning AI Copilot as a cybersecurity assistant to help organisations detect threats faster, automate response workflows and bridge skilled-talent gaps in cyber defence.
- The rupee closed at a new low against the dollar amid persistent outflows and strong US yields, with analysts warning of further gradual depreciation risk.
- RBI Deputy Governor T Rabi Sankar warned stablecoins pose macro-financial and monetary-sovereignty risks, adding they offer no advantages over existing fiat and payment systems.
- SEBI closed its insider-trading probe against Pranav Adani in an Adani group matter, citing lack of evidence sufficient to sustain charges, easing regulatory overhang.
- India Inc's profit after tax relative to capital employed reached a 14-year high of 10.47% in September 2025, up from 8.41% YoY, per CMIE data on 3,307 non-fin firms.

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- SEBI has mandated Market Infrastructure Institutions (MIIs), like stock exchanges, to appoint two executive directors to enhance operational oversight and strengthen internal governance standards.
- Food inflation remained negative (-3.91%) for the sixth consecutive month, driven by falling prices of vegetables, pulses and spices, significantly easing the burden on household budgets.
- Since 2020, the government has invested over ₹3,100 cr in women-led startups through schemes like the Fund of Funds with Maharashtra and Karnataka emerging as top beneficiaries.
- Gold prices rallied to a seven-week high and silver touched a new peak, driven by expectations of Federal Reserve rate cuts and strong industrial demand for silver.
- Novo Nordisk launched its diabetes drug Ozempic in India. The launch price is approximately ₹2,200 per week for the starting dose.

Geopolitical Updates:

- India and France are close to finalizing a new tax treaty, which is expected to resolve fiscal disputes and strengthen bilateral economic ties.
- India continues to be the second-largest importer of Russian fossil fuels, highlighting strong energy trade ties despite ongoing global geopolitical sanctions and pressures.
- Nepal plans to lift the ban on the circulation of Indian currency notes higher than ₹100, aiming to facilitate smoother trade and tourism.
- Mexico's Jan 2026 tariff hike (up to 50%) impacts 75% of India's \$5.75B exports, making goods like autos, steel and smartphones significantly costlier.
- The European Union is moving toward freezing or ring-fencing Russian sovereign assets, aiming to use related proceeds to support Ukraine while escalating financial pressure on Moscow.
- Debate continues over future Trump-era and prospective Trump tariffs, with businesses bracing for potential higher duties, supply-chain shifts and intensified US-China trade tensions.
- The US launched "Pax Silica," a nine-nation coalition to secure semiconductor supply chains. India was excluded, reportedly due to a lack of a critical technological edge in the sector.

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