



#indiaipo

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Tuesday

DAILY REPORTER

By
India IPO

FII/DII Activity (in ₹crores)

FII (Cash)	-1,468.32
DII (Cash)	1,792.25
FII (Index Futures)	474.61
FII (Index Options)	-6,755.97
FII (Stock Futures)	-2296.85
FII (Stock Options)	-538.06

Global Market Snapshot

Dow Jones	48,416.56	(▼ -0.09)
S&P 500	6,827.41	(▼ -1.07)
Nasdaq	23,593.86	(▼ -1.69)
Gift Nifty	26,090.50	(▼ -0.17)
Nikkei 225	50,168.11	(▼ -1.31)
Hang Seng	25,628.88	(▼ -1.34)

Macro Data

Brent Crude	60.56	(▼ -0.92)
Gold	133,960.00	(▼ -0.67)
Silver	195,590.00	(▲ 0.28)
Dollar Index	98.25	(▼ -0.15)
INR/USD	90.74	(▲ 0.34)
India 10Y Bond Yield	6.62	(▲ 0.15)
US 10Y Bond Yield	4.18	(▲ 0.00)

Indian Market

BSE Sensex	85,213.36	(▼ -0.06)
NIFTY 50	26,027.30	(▼ -0.08)
BSE SENSEX 50	27,165.46	(▼ -0.06)
NIFTY NEXT 50	68,622.45	(▲ 0.16)
BSE SENSEX Next 50	86,705.57	(▲ 0.13)
NIFTY BANK	59,461.80	(▲ 0.12)
BSE BANKEX	66,710.44	(▲ 0.07)
NIFTY FINANCIAL SERVICES	27,603.15	(▼ -0.25)
BSE Financial Services	13,131.46	(▼ -0.11)
NIFTY MIDCAP SELECT	13,862.60	(▼ -0.33)
BSE MidCap	46,552.50	(▲ 0.16)
India VIX	10.25	(▲ 1.38)

Recent IPO Updates:

- The NCLT has approved Flipkart's request to move its domicile to India, a crucial regulatory step ahead of its anticipated IPO.
- Renny Strips has submitted a DRHP with SEBI for an IPO, which consists of ₹300 cr fresh issue shares and OFS of up to 1.20 cr, seeking to raise funds for expansion and technology upgrades.
- Logistics platform Shiprocket Ltd. refiles a UDRHP with SEBI for an IPO worth ₹2,342 cr, which is a book-built issue that will list on NSE and BSE.
- In India, 2025 has been a landmark year, as 18 Indian startups collectively raised ₹41,000 cr through IPOs, signaling robust market confidence.
- ICICI Pru AMC's IPO hit 2.11x subscription (7.38 cr bids) on Day 2. NIIs subscribed 3.79x, QIBs 2.91x and retail 83% against 3.5 cr shares.
- Mebigo Labs (Kuku FM) appointed Kotak Mahindra, Axis Bank, and Morgan Stanley to manage its planned \$200 million IPO to fund content expansion.

P.E. & Funding Updates:

- IPF secured ₹3.2 cr to scale its peer-to-peer marketplace for children's products, enhancing focus on re-commerce.
- Wingify, owner of A/B testing platform VWO, has acquired AI startup Blitzllama to integrate advanced analytics, surveys and user insights for boosting product optimization capabilities.
- Fintech startup Scapia, backed by Peak XV, spent over ₹4 to earn ₹1 in FY25, reflecting early-stage scaling challenges despite strong growth backing.

Business & Economic Updates:

- SEBI board plans to review mutual fund norms, broker rules, IPO lock-in periods, and CRA mandates for greater efficiency and transparency in capital markets.

- Indian regulators are proposing tighter investment norms and safeguards for life insurance funds to ensure better security and stability for policyholders' assets.
- The RBI has increased the Variable Rate Repo auction size to INR 1.5T to manage liquidity tightening caused by advance tax payments
- A draft bill proposes renaming MGNREGS to GRAMG and increasing the financial burden on states, potentially requiring them to fund 40% of the scheme.
- Driven by increased rural activity and hiring, India's unemployment rate fell to 4.7% in November, marking an eight-month low.
- The Indian Rupee depreciated to a fresh all-time low of 90.83 against the US dollar (intraday) before settling at 90.73, pressured by persistent foreign fund outflows totaling ₹17,955 cr so far in December 2025.
- SBI's Chairman emphasized that digital payments will be the core feature driving user engagement on the upcoming revamped YONO 2.0 banking app.
- Rabi crop sowing is progressing well, covering 88% of the typical acreage, which bodes well for the upcoming agricultural output in India.
- The government tabled a bill to establish a single Higher Education Commission, sending it to a joint panel for further review and consensus.
- A new bill aims to cap nuclear plant operators' liability at ₹3,000 cr to encourage foreign investment and technology transfer in the nuclear sector.
- The World Economic Forum warned that Indian cement exporters face significant risks from the EU's Carbon Border Adjustment Mechanism (CBAM) tax.
- PSBs shrink sizes and merge low-traffic branches via AI, capitalizing on ₹93,675 cr H1 FY26 profit and 2.30% Gross NPAs to cut costs.
- The Fintech sector is transitioning from "growth-at-all-costs" to a "2.0" model, prioritizing vertical depth, asset quality and profitability over mere customer acquisition numbers.
- The government's new AI skill-mapping system promises smarter workforce placement and improved access to specialized talent pools across sectors.
- Agricultural progress remains strong, with winter sowing surpassing 84%, reflecting timely planting and favorable weather conditions.
- India's marine exports surged 16% Apr-Nov on strong US, Middle East demand, boosting the seafood sector amid global trade recovery.
- FMCG firms anticipate steady growth as GST supply disruptions fade and rural demand rebounds with festive season momentum.

- Consumers increasingly prefer gold-backed lending amid high interest rates, making gold loans a favored short-term credit option.
- Rising raw material costs and delayed receivables threaten the survival of over 60% Indian SME pharma firms.
- SITA to deploy AI-powered baggage tracking across Indian airports, improving accuracy and reducing delays.
- Noida International Airport nears operational readiness with advanced digital and sustainable infrastructure.
- Delhi's air quality plummeted to severe levels, with AQI nearing 500, reducing visibility and public mobility.
- India's merchandise exports to the US surged 22.6% to USD 6.98 billion in November, rebounding after two months of decline despite 50% tariffs. April-November exports rose 11.38%.
- The government is on track to reduce the central debt-to-GDP ratio to 56.1% in FY26, consistent with its fiscal consolidation glide path toward 50% by FY31.
- India's WPI inflation contracted 0.32% YoY in November 2025 (from -1.21% in Oct), driven by falls in food, mineral oils and crude petroleum. Food inflation eased to -2.60%.

Geopolitical Updates:

- Commerce Secretary Rajesh Agrawal confirmed India and the US are "very close" to signing an initial framework deal to resolve reciprocal tariff issues and lower duties.
- India and Mexico initiate PTA talks to counter Mexico's 5-50% tariffs on \$2 billion in Indian exports (auto, textiles, steel). Technical discussions began on December 12 after the virtual meeting; India exported \$5.75 billion to Mexico in FY25.
- India and US, both nations, are finalizing a deal to remove additional flight restrictions, enhancing bilateral aviation access.
- Summit discussions between PM Modi and Jordan's King focused on deepening cooperation against terrorism and strengthening regional peace to intensify collaborative efforts.
- Indian and Canadian officials are assessing the scope of an Early Progress Trade Agreement (EPTA), aiming to conclude negotiations within a year to deepen bilateral economic ties.

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