

**FII/DII Activity (in ₹crores)**

FII (Cash)	-1,805.37
DII (Cash)	5,429.78
FII (Index Futures)	1,601.50
FII (Index Options)	2,945.83
FII (Stock Futures)	-23.96
FII (Stock Options)	1,141.53

Global Market Snapshot

Dow Jones	46,429.49	(▲ 0.66)
S&P 500	6,556.37	(▼ -0.37)
Nasdaq	21,761.89	(▼ -0.84)
Gift Nifty	23,278.00	(▲ 1.44)
Nikkei 225	53,749.62	(▲ 2.87)
Hang Seng	25,335.95	(▲ 1.09)

Macro Data

Brent Crude	102.22	(▼ -2.17)
Gold	144,840.00	(▲ 0.08)
Silver	235,280.00	(▼ -0.61)
Dollar Index	99.66	(▲ 0.40)
INR/USD	93.88	(▲ 0.00)
India 10Y Bond Yield	6.83	(▼ -0.29)
US 10Y Bond Yield	4.34	(▼ -0.69)

Indian Market

BSE Sensex	74,068.45	(▲ 0.00)
NIFTY 50	22,912.40	(▲ 0.00)
BSE SENSEX 50	23,942.04	(▲ 0.00)
NIFTY NEXT 50	62,360.70	(▲ 0.00)
BSE SENSEX Next 50	76,752.77	(▲ 0.00)
NIFTY BANK	52,605.65	(▲ 0.00)
BSE BANKEX	59,218.21	(▲ 0.00)
NIFTY FINANCIAL SERVICES	24,482.20	(▲ 0.00)
BSE Financial Services	11,475.74	(▲ 0.00)
NIFTY MIDCAP SELECT	12,532.40	(▲ 0.00)
BSE MidCap Select	15,194.45	(▲ 0.00)
India VIX	24.74	(▲ 0.00)

Recent IPO Updates:

- Reliance Jio is discussing with 13 global investors, including Meta and Google, to sell 8% of their individual holdings, totaling a ₹33,000 Cr to ₹40,000 Cr offer-for-sale.
- SpaceX plans to file its IPO prospectus this week, targeting a \$75 billion-plus raise potentially one of history's largest IPOs with individual investor allocation possibly exceeding 20%.
- SEBI has proposed a standardized "IT Resilience Index" (ITRI) to evaluate the technological durability and disaster recovery protocols of market infrastructure, ensuring operational stability during high-volume IPO listings.
- Gadget reseller Cashify has appointed ICICI Securities and Nomura for its ₹1,800 Cr IPO. The company eyes an early 2027 listing to expand its refurbished electronics retail footprint.

P.E. & Funding Updates:

- Fullife Healthcare, the parent of wellness brand Fast & Up, secured ₹300 Cr in Series D funding led by Elev8 Venture Partners to expand its global nutrition portfolio and manufacturing.
- Indian tech startups raised approximately ₹81,900 Cr in 2025. While a 17% decline from 2024, the ecosystem saw 42 tech IPOs and steady unicorn creation despite a "funding winter."
- Insurtech startup Plum secured ₹193 Cr in a Series B round led by Peak XV Partners to expand its AI-driven employee healthcare and wellness benefit platform.
- B2B SaaS platform Rocketlane raised ₹564 Cr in Series C funding led by Insight Partners to strengthen its "Nitro" agentic AI platform for professional services.
- A91 Partners led a ₹235 Cr round for Deccan AI. The startup focuses on high-accuracy AI systems for Fortune 500 enterprises, automating back-office and middle-office workflows.
- Burmese restaurant chain Burma Burma secured ₹38 Cr from Negen Capital. The funds will fuel expansion into new cities, valuing the vegetarian dining brand at ₹500 Cr.
- Veteran investor Ashish Kacholia led a ₹7.1 Cr funding round for pediatric wellness startup RN Kids to enhance its specialized healthcare offerings for children across India.

- Shark Tank India featured startup Canvaloop secured ₹14 Cr to scale its proprietary technology that converts agricultural waste into high-quality sustainable textile fibers for global fashion brands.

Business & Economic Updates:

- S&P Global Ratings increased India's FY27 GDP growth forecast to 7.1%, citing resilient private consumption and investment, though it warned of risks from high oil prices and geopolitical tensions.
- The Indian government has officially retained the retail inflation target at 4% (with a 2% band) for the next five years ending March 2031, following a periodic review.
- The Indian Rupee touched a lifetime low of ₹93.96 against the US dollar due to surging crude oil prices and capital outflows triggered by escalating Middle East conflicts.
- Finance Minister Nirmala Sitharaman defended the 2025 GST rate cuts, noting they spurred record demand in automobiles and tractors, significantly increasing revenues for states like Tamil Nadu by 18%.
- Global Capability Centres (GCCs) are moving away from self-built models. Roughly 90% now use external partners, with setup phases generating ₹160 Cr ₹420 Cr in advisory and infrastructure deals.
- The Union Cabinet approved the "Modified UDAN" scheme for 10 years (FY27–FY36) with a ₹28,840 Cr budget to develop 100 new airports and 200 helipads for regional connectivity.
- Adani is in preliminary talks with Meta and Google about partnerships for his ₹8.40 lakh Cr data centre and digital infrastructure push, with a focus on renewable energy supply.
- Bengaluru and Hyderabad now account for 53% of Grade A office space. These hubs are attracting massive private investment, with one in four new Indian companies now registered in these two cities.
- The Indian government appointed retired IDAS officer K.V. Ramana Murty as a whole-time member of SEBI for three years, completing the regulator's full four-member board for market oversight.
- India is accelerating its transition to piped natural gas (PNG) and expanding strategic petroleum reserves to enhance energy security and reduce the logistical costs of traditional cylinder-based LPG distribution.
- Despite the rapid growth in solar generation, the government has postponed the coal flexibility plan to ensure grid stability and meet the rising peak power demand during the summer.
- Indian markets surged for a second day, recovering a third of recent war-driven losses. The rally restored approximately ₹16.15 lakh Cr in market capitalisation as crude oil prices cooled globally.
- Italian retailer OVS is expanding its footprint with a new 11,000 sq. ft. store in Mumbai. The brand aims to tap into India's growing ₹1.42 lakh Cr organised apparel market.
- To curb "influencer" fraud, SEBI is partnering with Google to verify 600+ trading apps. Chairman Tuhin Kanta Pandey flagged 66 fake apps, warning of digital fraud risks to India's ₹423 lakh Cr market.

- External Affairs Minister S. Jaishankar told an all-party meeting that India will not act as a "broker" (dalal) in the US-Iran conflict, asserting India's independent and strategic diplomatic stance.
- The Union Cabinet approved a new climate target to reduce emission intensity by 47% by 2035. The plan includes achieving 60% non-fossil fuel electricity capacity to meet global commitments.
- The Commerce Ministry is compiling granular industry data to challenge US allegations of "excess capacity" in India's steel and solar sectors, aimed at avoiding potential retaliatory trade tariffs.
- At the WTO's 14th Ministerial Conference, India supported global investment flows but opposed the "Investment Facilitation for Development" (IFD) pact's inclusion in the WTO, citing it as a non-trade issue.
- India's microdrama market reached ₹2,600 Cr in its first year and is projected to hit ₹40,000 Cr by 2030, driven by mobile-first vertical content and 10 crore active users.

Geopolitical Updates:

- Indian refiners secured 6 Cr barrels of Russian oil for April delivery, utilizing a temporary US waiver to stabilize domestic energy supplies amid disruptions in the Strait of Hormuz.
- Following a temporary easing of US sanctions, India purchased its first Iranian LPG cargo in years to address a domestic cooking gas crisis caused by regional shipping disruptions.
- While Iran declared the Strait open to "non-hostile" vessels, premiums for war risk insurance have surged to 10% of vessel value. Some ships are reportedly paying ₹18 Cr for "safe passage."

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