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DAILY REPORTER

By
India IPO

Recent IPO Updates:

- Citus Transnet is ready to launch its Infrastructure Investment Trust (InvIT) IPO of ₹1,340 Cr to mobilise capital for high-yield power assets. The issue aims to acquire securities (partially or fully) and to run day-to-day operations.
- The NSE has initiated formal preparations for its long-awaited IPO and recently held discussions with 20 investment bankers to outline the roadmap for this landmark listing, which might be filed in July.

P.E. & Funding Updates:

- Global PE firm Permira is investing approximately ₹830 Cr in SILA to fuel its expansion. The funding will bolster the real estate services firm's growth across Indian markets.
- Max Healthcare has successfully acquired around 59% stake in Kalinga Hospital for ₹300 Cr. This strategic acquisition expands Max's medical footprint into the Odisha region, enhancing its healthcare delivery network.
- Cyient Semiconductor has acquired a 74% stake in US-based Kinetic Tech for approximately ₹705 Cr. Cyient Semiconductor plans to enhance its global semiconductor design and manufacturing capabilities through this acquisition.
- Kluisz, now rebranded as Nava, raised approximately ₹180 Cr to accelerate its cloud-based services. The funding will support the company's aggressive expansion into new digital infrastructure markets.
- D2C farm produce brand Pluckk raised ₹100 Cr in an all-equity round from Euro Gulf Investment. The capital is earmarked for R&D, tech enhancement and expanding its geographic footprint.
- Skincare startup ClayCo secured approx ₹35 Cr to expand its product range and strengthen working capital. The brand, inspired by global beauty standards, has seen 14-fold revenue growth over two years.

FII/DII Activity (in ₹crores)

FII (Cash)	-2,811.97
DII (Cash)	4,168.17
FII (Index Futures)	5,072.95
FII (Index Options)	-3,163.33
FII (Stock Futures)	2,521.79
FII (Stock Options)	19.78

Global Market Snapshot

Dow Jones	47,909.92	(▲ 2.85)
S&P 500	6,616.85	(▲ 0.08)
Nasdaq	22,017.85	(▲ 0.10)
Gift Nifty	24,099.00	(▲ 4.16)
Nikkei 225	56,308.42	(▲ 5.39)
Hang Seng	25,893.02	(▲ 3.09)

Macro Data

Brent Crude	94.75	(▼ -13.29)
Gold	151,280.00	(▼ -1.63)
Silver	237,780.00	(▼ -2.57)
Dollar Index	99.02	(▼ -0.66)
INR/USD	92.59	(▼ -0.43)
India 10Y Bond Yield	7.03	(▼ -0.28)
US 10Y Bond Yield	4.3	(▲ 0.00)

Indian Market

BSE Sensex	77,562.90	(▲ 3.95)
NIFTY 50	23,997.35	(▲ 3.78)
BSE SENSEX 50	25,085.33	(▲ 3.76)
NIFTY NEXT 50	66,145.30	(▲ 4.74)
BSE SENSEX Next 50	80,807.64	(▲ 4.09)
NIFTY BANK	55,703.90	(▲ 5.67)
BSE BANKEX	62,701.68	(▲ 5.72)
NIFTY FINANCIAL SERVICES	26,053.05	(▲ 5.54)
BSE Financial Services	12,174.48	(▲ 5.48)
NIFTY MIDCAP SELECT	13,219.90	(▲ 4.75)
BSE MidCap Select	16,152.02	(▲ 4.93)
India VIX	19.7	(▼ -20.24)

- AI-driven accounting platform Atlas raised approx ₹55 Cr in seed funding led by Accel. The startup plans to scale its AI tools and expand its presence in North America.
- Deep-tech startup RoshAi secured ₹22 Cr to develop driverless solutions for industrial vehicles. The funding will help scale its retrofit-based autonomous systems for mining, ports and logistics hubs.
- AI interaction platform Angoor AI raised ₹2 Cr in a pre-seed round. The Bengaluru-based startup will use the funds to expand its engineering team and scale its enterprise sales function.

Business & Economic Updates:

- SEBI has mandated that pledged shares of promoters be tagged as "non-transferable" during the mandatory IPO lock-in period. This move aims to prevent promoters from bypassing holding rules.
- Insurance providers indicate that marine premiums will stay high due to regional instabilities. Sustained risk levels are deterring private capital from lowering rates in the shipping insurance sector.
- The RBI maintained the repo rate at 5.25% to combat inflation. Governor Malhotra emphasized that stability is crucial as the ₹800 Cr West Asia crisis impacts global supply chains.
- The World Bank upgraded India's FY27 growth projection to 6.6%. This reflects robust domestic demand despite global headwinds, positioning the economy for a multi-Cr expansion in the coming years.
- The FMCG sector faced a sharp contraction in March due to the Iran crisis. Rising input costs and logistic hurdles have wiped out nearly ₹1,500 Cr in projected quarterly growth.
- Crude prices dropped below \$100 per barrel following a brief spike. Market analysts suggest this volatility could save Indian refiners over ₹500 Cr in daily import costs if sustained.
- Energy supplies are expected to stabilize, though costs remain high. The government may provide a ₹2,000 Cr subsidy cushion to protect consumers from the immediate impact of high import prices.
- The Adani Group is to invest ₹33,000 Cr into three major projects in Odisha. These initiatives span logistics and energy sectors, promising significant infrastructure development and local employment opportunities.
- The Indian government increased the non-urea fertilizer subsidy by 10-12% to offset rising global prices. This fiscal support ensures farmers have access to affordable nutrients despite international market fluctuations.

- Startup funding in India declined by 18% to approximately ₹97,110 Cr in FY26. Despite the dip, investors remain focused on sustainable business models and long-term profitability.
- The government has increased the allocation of LPG and natural gas for key industrial sectors. This move aims to lower production costs and ensure a steady energy supply for manufacturing.
- Daikin Industries has announced a significant investment of approximately ₹1,000 Cr to expand its manufacturing footprint in India. The capital will boost production capacity to meet rising domestic and export demand.
- The Union Cabinet approved a ₹41,543 Cr fertiliser subsidy for the upcoming Kharif season. This significant financial support ensures that essential nutrients remain affordable for farmers to maintain crop yields.
- Finance Minister Nirmala Sitharaman highlighted that the MUDRA scheme continues to empower grassroots entrepreneurs. By providing credit access, the scheme fosters self-employment and drives economic growth at the local level.

Geopolitical Updates:

- After 7 years, India will receive Iranian crude via the vessel Jaya. This ₹600 Cr transaction marks a significant shift in energy diplomacy amid easing U.S. sanctions.
- India officially welcomed the recent truce in regional conflicts, advocating for a shift toward dialogue and diplomacy. The government emphasised that peaceful negotiations are the only sustainable path forward.
- Bangladesh has formally requested increased supplies of oil and fertilisers from India. This cooperation highlights the deepening bilateral trade ties and India's role as a critical regional energy and agri-hub.

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