

**FII/DII Activity (in ₹crores)**

FII (Cash)	-1,918.99
DII (Cash)	2,221.27
FII (Index Futures)	2,564.75
FII (Index Options)	-23,472.18
FII (Stock Futures)	1,556.71
FII (Stock Options)	534.85

**Global Market Snapshot**

Dow Jones	49,149.38	(▼ -0.59)
S&P 500	7,109.14	(▼ -0.24)
Nasdaq	24,404.39	(▼ -0.26)
Gift Nifty	24,575.00	(▲ 0.96)
Nikkei 225	59,349.17	(▲ 0.89)
Hang Seng	26,487.48	(▲ 0.48)

**Macro Data**

Brent Crude	98.48	(▲ 3.14)
Gold	153,530.00	(▼ -0.42)
Silver	250,230.00	(▼ -0.73)
Dollar Index	98.39	(▲ 0.35)
INR/USD	93.5	(▲ 0.40)
India 10Y Bond Yield	6.9	(▼ -0.14)
US 10Y Bond Yield	4.3	(▲ 1.18)

**Indian Market**

BSE Sensex	79,273.33	(▲ 0.96)
NIFTY 50	24,576.60	(▲ 0.87)
BSE SENSEX 50	25,706.72	(▲ 0.88)
NIFTY NEXT 50	70,824.45	(▲ 0.69)
BSE SENSEX Next 50	85,304.01	(▲ 0.68)
NIFTY BANK	57,371.45	(▲ 1.39)
BSE BANKEX	64,662.55	(▲ 1.46)
NIFTY FINANCIAL SERVICES	26,850.75	(▲ 1.18)
BSE Financial Services	12,594.26	(▲ 1.32)
NIFTY MIDCAP SELECT	13,919.45	(▲ 0.81)
BSE MidCap Select	17,167.68	(▲ 0.73)
India VIX	17.53	(▼ -6.71)

**Recent IPO Updates:**

- Dealmakers are receiving hefty salary hikes as the Indian primary market hits a multi-year high, raising over 30% for investment bankers for share sales.
- Bengaluru-based AMBA Auto Sales and Services has filed for an IPO with a pre-issue equity value of ₹13.5 Cr to fund new showrooms and working capital.
- Inox Clean Energy has revived plans for a mega IPO to raise to ₹8,400 Cr (\$1 BN), aiming to capitalise on the surging investor demand for renewable energy stocks.

**P.E. & Funding Updates:**

- Swedish firm EQT has successfully raised ₹1.31 lakh Cr for its largest-ever Asian private equity fund, focusing heavily on expansion opportunities within India and Japan.
- Evren, a Brookfield-Axis Energy joint venture, secured ₹5,040 Cr from global lenders to develop a 1 GW hybrid renewable energy project in Andhra Pradesh and Rajasthan.
- Raise Financial Services has acquired the algorithmic investment platform Stratz to bolster its wealth-tech offerings, integrating advanced quantitative tools for retail investors to automate their trading strategies.
- Popular tea chain Chaayos is planning to raise to ₹588 Cr (\$70 MN) in a new funding round to accelerate its retail footprint and digital infrastructure across India.
- AI-agentic platform NudgeBee secured ₹25.2 Cr (\$3 MN) from Kalaari Capital and other tech investors to automate complex cloud operations using specialised, autonomous artificial intelligence agents.
- Nithin Kamath's Rainmatter invested ₹19.5 Cr in wealthtech platform PrimeInvestor, enabling the firm to expand its research-based portfolio management services for retail investors across India.
- Legal-tech startup Lawyered raised ₹21 Cr (\$2.5 MN) in a round led by Rainmatter and Turbostart to scale its legal assistance platform beyond the mobility and logistics sectors.

- Mirae Asset is set to anchor a new India-focused fund by South Korean giants Krafton and Naver, targeting high-growth startups in the gaming, content, and deep-tech ecosystems.
- Health-focused QSR startup Açai Theory raised ₹4 Cr from TDV Partners to expand its retail footprint and strengthen its supply chain for healthy, superfood-based snack options.
- Raise Financial Services has successfully acquired the algorithmic platform Stratzzy, integrating advanced quantitative investing tools into its ecosystem to help retail users automate their market strategies.

## Business & Economic Updates:

- Indian exporters in the textile and chemical sectors are eyeing refunds worth ₹1 lakh Cr (\$12 BN) following the opening of a massive US customs duty rebate window.
- The RBI has implemented a ₹15,000 cap for digital recurring payments without an OTP, balancing consumer convenience with enhanced security protocols for high-value automated transactions.
- For the first time this century, coal-based power generation in India and China fell simultaneously in 2025, as solar and wind energy production saw record-breaking growth.
- The RBI has eased restrictions on Non-Deliverable Forward (NDF) contracts, allowing banks more flexibility to rebook cancelled derivative trades for both Indian and overseas clients.
- India has emerged as Canva's second-largest market for AI usage, helping drive a 40% surge in the company's annual recurring revenue to ₹33,600 Cr (\$4 BN).
- A new report indicates India leads the world in AI healthcare adoption at 85%, significantly outpacing the US and UK due to rapid digital infrastructure expansion.
- Suzlon Energy confirms India is on track to meet its 100 GW wind capacity target by 2030, with state utility demand estimated to reach 107 GW soon.
- The government is proposing mandatory disclosure norms for AI-generated content to combat deepfakes, requiring firms to label synthetic media and ensure algorithmic accountability for safety clearly.
- The Indian Rupee slipped following a partial rollback of foreign exchange curbs by the RBI as the market adjusted to increased volatility in non-deliverable forward contracts.
- The SEBI has promoted eight senior officials to the rank of Deputy Managing Director, effective Tuesday, to strengthen regulatory oversight.
- Financial markets have officially returned to pre-pandemic growth trajectories, with industrial output and consumer spending exceeding the highs recorded during the 2020-2022 period.
- India is leading a global shift toward "Digital Sovereignty," with the government and private firms investing heavily in localised AI stacks to reduce dependence on foreign technology.
- NSE may pay ₹1,800 Cr to settle various long-standing cases with SEBI, aiming to resolve legal hurdles and pave the way for its IPO.

- India Post has successfully crossed the ₹15,000 Cr revenue mark, driven by a massive footprint expansion and a significant surge in e-commerce logistics and parcel delivery services.
- India's foodgrain stocks have swelled to record levels, prompting the government to focus on advanced storage management as wheat and paddy production reach new historical highs.
- India's seafood exports surged 11.2% to reach a record approximately ₹72,325 Cr in 2025-26, driven by robust demand from China and the European Union despite US dips.
- A FICCI report highlights that India is losing approximately ₹78,960 Cr annually due to unmanaged textile waste, emphasising the urgent need for a circular economy framework.
- The RBI is proposing stricter norms to curb digital fraud, including a "kill switch" for payments and a one-hour delay for high-value transfers above ₹10,000.
- Defence Minister Rajnath Singh warned of energy security risks following firing incidents near the Strait of Hormuz, prompting the government to coordinate with global naval forces to protect vessels.

## Geopolitical Updates:

- President Trump extended the US ceasefire with Iran to allow further negotiations, but remains "ready to bomb" if the blockade of Iranian ports continues to be challenged.
- India and Taiwan have requested a timeline extension until October 2026 to settle their Information and Communications Technology dispute at the WTO through bilateral negotiations.
- India and South Korea have signed a Memorandum of Understanding (MoU) to boost MSME ties, facilitating technology transfers and joint ventures in sectors like electronics and automotive components.
- The latest round of bilateral trade negotiations between India and the US concludes today in Washington, with both nations nearing a final agreement on long-standing tariff disputes.

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