US Data Center Daily Briefing

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KEY THEMES

- Bharat Future City verified 30,000-acre core near Hyderabad
- Bharat Future City 313-acre data centre hub still unnotified
- HMDA metropolitan expansion under G.O. Ms. No. 68, March 2025
- Enchanted Rock S-1/A: 27.9M shares at $20-$23, ~$600M IPO

Why Bharat Future City isn't underwritable yet

In Indian data centre markets the gating items are never the acreage on a brochure — they are notified land-use maps, earmarked megawatts, a substation voltage level, and a water entitlement. Telangana's Bharat Future City has cleared the first hurdle and none of the others: HMDA-hosted Telangana Rising 2047 material identifies it as a 30,000-acre next-generation urban development, the clearest official anchor for project scale. But the figures developers actually care about — a 313-acre data centre hub, a 403-acre AI city, and a 765 sq km planning extent — have not been confirmed in any gazetted notification, statutory land-use map, or allotment schedule surfaced from open-source material. No MW or IT-load allocation has been found for the proposed data centre zone, which is the single largest missing datapoint for anyone trying to treat the site as committed pipeline.

- Bharat Future City: 30,000-acre core verified, data centre zoning still unconfirmed – HMDA Telangana Rising 2047 docs anchor the 30,000-acre scale; 313-acre DC hub and MW allocation remain pre-notification.
- Enchanted Rock S-1/A supports ~$600M IPO; data centre revenue mix undisclosed – ERock's SEC S-1/A covers 27,906,977 shares at $20-$23, ~$558.1M-$641.9M gross; no segment breakout isolating data centres (TRADE corroboration only on proceeds).

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