



## Our News Your Views

### Newsletter from the Desk of Dr. Aditya Vijay Kashyap

#### ✓ Quote by Dr. Aditya Vijay Kashyap

“In markets, resilience isn’t just enduring volatility—it’s converting instability into strategic opportunity.”

#### ✓ 50 Business News Headlines for June 25, 2025

1. S&P BSE Sensex falls ~0.76%, Nifty drops 196 pts to 24,915
2. Rupee rallies 75 paise to ₹86/USD—biggest monthly gain
3. Vodafone Idea set to receive relief as Scindia flags telecom duopoly
4. FM Sitharaman defends India’s tariff position amid global scrutiny
5. Govt launches new scheme promoting imported EV adoption
6. Walmart shifts India strategy—no more chasing brick-and-mortar
7. Train fares to rise after 5 years from July 1
8. EPFO auto-settlement limit raised to ₹5 lakh
9. Bribery case: Adani Group unscathed in U.S. probe
10. Hindalco to acquire AluChem (U.S.) for \$125 million
11. Govt mulls rare-earth magnet sops to lessen China dependence
12. Tata Motors says JLR resilient amid supply issues; Avinya delayed
13. Shipping insurance costs rise amid West Asia tensions
14. Expert panel to conduct nationwide income distribution survey by 2026
15. EPFO increases auto-settlement for advance claims to ₹5 lakh
16. DGCA tightens weather safety guidelines for pilots

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17. Air India cuts domestic and international flights amid conflict
18. Ex-OpenAI CTO's startup Thinking Machines raises \$2 bn at \$10 bn valuation
19. Amazon launches at-home diagnostics service in India
20. Zen Technologies acquires majority stake in TISA Aerospace
21. India's core sector grows 0.7% in May—cement, steel lead
22. Crisil expects limited impact from Middle East tensions on India Inc
23. MediaTek Dimensity 8450 challenges Qualcomm in premium smartphone market
24. Canva adds AI video-generation with audio via partnership
25. Sebi relaxes ESOP rules, PSU delisting enabled
26. Etihad reports 19% rise in May passenger figures, 100-aircraft fleet achieved
27. Airbnb partners with FIFA for multi-tournament tie-up
28. Maharashtra govt digitises HR for 700k employees
29. HDFC Bank HR head Vinay Razdan steps down
30. Accenture slows hiring, redeploys staff
31. Chennai-born Anantha Chandrakasan named MIT provost
32. IIT Delhi tops Indian QS world university 2026 rankings
33. U.S.–India interim trade deal possible by June 25
34. Trump-led U.S. delays new tariffs on India over trade talks
35. Micron commits \$200 billion to U.S. semiconductor R&D
36. Nippon Steel completes \$14.9 bn acquisition of U.S. Steel
37. At Home retailer files Chapter 11 amid tariff pressure
38. Burlington Co. crowd crush aftermath under inquiry
39. Bangalore RCB marketing head arrested post-stampede

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40. Qatar Airways orders \$96 bn Boeing jets
41. Global Airlines starts Glasgow–NYC A380 service
42. Chengdu J-7 jet crashes in Myanmar
43. UK energy price cap to fall per Ofgem review
44. ONS reports UK net migration halved in 2024
45. Thomson Reuters sale of Daily Telegraph pending
46. North Face and Cartier hit by cyber-attacks
47. India bans vehicles >10 years in Delhi fueling zones
48. Gujarat, Punjab, Kerala, West Bengal by-election results under review
49. Iran–Israel ceasefire holds; global markets rally
50. U.S. Fed Chair Powell resists Trump pressure, maintains wait-and-watch stance

### ✓ **“Scorpion Insight” – Daily Investment Takeaway**

Global markets remain jittery amid geo-political flashpoints and volatile commodity prices—but India stands firm. With core sector growth easing and corporate earnings showing resilience, attractive entry opportunities are emerging in select mid-cap and defence-heavyweight stocks. Tactical play: tilt allocations toward high-quality names in Cement, Steel, and select IT firms with strong order visibility.

### ✓ **Scorpion Capital’s Special Market View**

- U.S.–India trade deal near completion—could boost bilateral flows; early positioning in export-driven mid-caps may pay off.
- Rupee strength (~₹86/USD)—reduces import costs, aids margin pressure in oil-linked sectors.
- Core growth data + Crisil caution—suggests an economy still on track, but global headwinds linger.
- Defence and infrastructure bets—amid continued govt capex and rising global tensions, these remain central to our thematic overweight stance.

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