



Our News Your Views



Newsletter from the desk of Dr Aditya Vijay Kashyap

Date: June 28, 2025



Quote by Dr. Aditya Vijay Kashyap

“In uncertainty lies opportunity: the most vigilant investor turns volatility into vision.”



50 Business News Headlines for Today

1. Piyush Goyal to meet exporters on June 30 amid global tensions
2. India's economy to hold top growth spot, but weak jobs linger: Reuters poll
3. India-US trade deal negotiations intensify before Trump's tariff deadline
4. GTRI cautions India against one-sided US trade pact
5. India-US deal hits rough patch over agriculture and tariffs
6. Nestlé India board meets for bonus-share decision
7. Banks closed both today (4th Saturday) and Sunday
8. Kolkata office-space demand doubles in Q2, residential sales dip 10 %
9. Air India crisis: T. V. N. Chandrasekaran to take charge
10. HDB Financial Services IPO raises ₹3,369 cr from anchor investors
11. RBI's welfare expenditure rises due to data issues
12. Adani Group raises \$1 bn for Mumbai airport expansion
13. S&P raises India's FY26 GDP forecast to 6.5 %

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14. Global stocks steady; oil dips amid Iran–Israel ceasefire
15. HDFC lowers FD rates; ICICI leads vs SBI/HDFC
16. BSE Sensex swings 1,000 pts; Nifty hits 9-month highs
17. Apple supplier Foxconn to invest \$2.2 bn in India
18. Tesla EV sales skid in Europe despite recovery elsewhere
19. Motilal Oswal releases monthly stock picks
20. Sensex reclaims 84k—first time since October; hybrid funds gain traction
21. ICAI launches GCC summit targeting \$100 bn growth
22. Amazon same-day delivery jumps 23 % YoY
23. JSW Steel moves SC over ₹19,700 cr Bhushan Power resolution
24. ICRA cuts FY26 GDP growth forecast to 6.2 %
25. New AI cameras on Dwarka Expressway launched by NHAI
26. EPFO raises auto-claim settlement limit to ₹5 lakh
27. ICAO to probe Air India crash under global norms
28. JSW Paints eyes Akzo Nobel India buyout for \$1 bn
29. 39 containers of Pakistani goods seized via UAE route
30. Gold price falls ₹5,500 from recent peak
31. Global services hubs boost Indian job market
32. Trump tariffs prompt shift to gold/euro over USD: OMFIF
33. Trump criticizes Fed Chair Powell on rate stance
34. Oil slides 6 % after Middle East ceasefire; Asian markets rally
35. Strait of Hormuz tensions raise marine insurance costs
36. Qantas flight returns early due to airspace closure
37. Chenab Bridge inaugurated as world's highest railway arch
38. New list of top 10 nuclear-armed countries published
39. World's 12 busiest airports ranked
40. India projected to overtake Germany/Japan as 3rd largest economy
41. Retail inflation hits 6-year low in March CPI report
42. Pamban Bridge vertical-lift inaugurated by PM Modi
43. Foxconn details new factory investment in India
44. EPFO auto-claim process update
45. RBI likely to maintain neutral stance in upcoming policy
46. GST collections see 11% rise YoY this month
47. Realty sector sees steady Q2 pre-sales despite rate hikes
48. Mutual fund SIP inflows cross ₹18,000 cr benchmark
49. Foreign portfolio investors net buyers in June so far
50. Digital rupee pilot expands to more cities, banks onboarded

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“Scorpion Capital Insight” – Daily Investment Takeaway

Focus on India–US trade talks: with looming July tariffs and India’s defensive position on agriculture and digital sectors, expect near-term volatility in export-oriented sectors and banks. Yet, sustained government capex and macro resilience could open attractive entry points once clarity emerges.



Scorpion Capital’s Special Market View

- Macro stance: India’s FY26–27 GDP growth forecast steady at 6.4–6.7 %, driven by infra push and steady consumption.
- Investment strategy: 80 % allocation to domestic cyclicals and infra; 20 % to carefully selected export plays, hedged with Nifty puts.
- Risks: Tariff escalation, soft job market data, and possible RBI pivot post-neutral stance.



Full Disclaimer

This communication is purely informational and should not be construed as investment advice, offer, or solicitation. Past performance is no guarantee of future results. Investments are subject to risks including possible loss of principal. Opinions are those of Dr Aditya Vijay Kashyap and Scorpion Capital and may change. Investors should do their own due diligence or consult a qualified advisor before making investment decisions.

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