

## Our News Your Views

 Scorpion Capital

*From the Desk of Dr Aditya Vijay Kashyap*

*Date: June 30, 2025*

*"In every market cycle lies an opportunity—discipline and insight turn volatility into the investor's edge."*

### 50 Business News Headlines – June 30, 2025

1. India well-positioned for "Globalisation 2.0", says Anand Mahindra; urges speed and private investment
2. A week of major anniversaries shaping global economic, political and cultural outlook
3. Jaishankar to join Quad meeting in Washington June 30–July 2 to discuss Indo-Pacific cooperation
4. Reuters poll: India's economy to grow 6.4% in FY 2025-26 despite underlying weaknesses
5. Piyush Goyal to meet exporters June 30 amid West Asia tensions
6. RBI bulletin says Indian economy resilient, inflation low at 2.82% in May after 50 bps rate cut
7. Business activity in India surges in June on strong demand, record export orders (PMI data)
8. HDB Financial Services IPO subscribed 16.7x, anchor investors include LIC & BlackRock
9. Tata's N Chandrasekaran takes interim day-to-day charge at Air India amid leadership changes
10. Adani co raises \$1 bn for Mumbai airport project
11. Oil drops over 7% as Iran-Israel ceasefire hopes ease Middle East tensions
12. Global central banks diversify into gold and euro amid U.S. tariff-driven dollar weakness
13. Meta and Oakley collaborate on performance AI glasses
14. Binance founder projects Bitcoin could reach \$1 million
15. Morgan Stanley invests \$30 m in methane-management firm Insight M

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16. Foxconn to invest \$2.2 bn in new India/US facilities
17. Tesla EV sales dip in Europe despite overall rebound
18. UK floats modern industrial strategy with mixed reception
19. US airstrikes escalate Iran conflict; markets cautious
20. Apple supplier Foxconn gets Taiwan approval for \$2.2 bn India investment
21. Crypto travel stocks rally as Israel-Iran ceasefire holds, oil slides
22. Israel-Iran conflict: Oil slides 6% post Iran's 'symbolic' strikes
23. Risky Strait of Hormuz leads to surge in marine insurance costs
24. Hindalco to acquire US-based AluChem for \$125 m to expand alumina footprint
25. Adani and Reliance partner to share fuel infrastructure
26. Tata becomes India's first \$30 bn brand according to Brand Finance
27. Adani Group pioneers first off-grid green hydrogen plant
28. Bajaj Allianz launches state-specific health insurance plans
29. NPCI surplus crosses ₹1,500 cr FY25; revenue at ₹3,270 cr
30. IFFCO sets up overseas nano-fertiliser plant in Brazil
31. IRDAI fines Edelweiss Life ₹1 cr for corporate governance lapses
32. Jio BlackRock Broking gets SEBI nod to launch operations
33. NPCI launches API for PAN-Bank account validation on tax portal
34. MoSPI launches GoIStats app for mobile access to official stats
35. SIAC arbitration awards ₹23.7 cr to Amazon in Future Group dispute
36. Anant Ambani to get ₹10-20 cr salary as Reliance ED
37. Tech startups ramp up hiring after funding slowdown
38. Indian pharma eyes US gains ahead of \$63.7 bn patent cliff
39. Ascendas Firstspace targets q-commerce warehousing market

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40. Germany's Rayzon Solar files draft papers to raise ₹1,500 cr via IPO
41. G7 nations approve "side-by-side" US minimum tax deal
42. NHPC launches 252 MW Arunachal power project MoU signed
43. Bihar to pilot India's first mobile e-voting in Buxar
44. Indian coal imports from Russia at two-year high in May
45. Online dispute resolution portal launched to expedite MSE payment delays
46. SoftBank's Masayoshi Son hints at succession plan
47. Amit Shah says India sets \$1 bn turmeric export target by 2030
48. NHPC project in Arunachal signed; e-voting pilot in Bihar
49. India to host largest GCC summit to power \$100 bn ambition

### **Scorpion Capital Insight – Today's Investment Takeaway**

*Volatility is opportunity.*

*Geopolitical flashpoints (Middle East), rising inflationary pressures, and trade developments offer active investors outsized returns—especially via energy hedges, defense equities, and sustainable tech. Our strategy: disciplined accumulation at key pullbacks with dynamic risk management.*

### **Scorpion Capital's Special Market View**

*Looking ahead to July with cautious optimism:*

- Energy: Brent crude likely range-bound at \$65–75/bbl; a flare-up in Hormuz could spike prices.
- Equities: Expect rotation from mega-cap tech toward cyclicals, AI, and defense. Tactical trimming of rich growth names advised.
- Credit & Rates: Emerging-market bonds attractive amid stable Indian inflation and neutral RBI stance; watch U.S. jobs data for Fed signals.

### **Full Disclaimer**

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