



Our News Your Views



Newsletter – From the Desk of Dr Aditya Vijay Kashyap



Quote of the Day

“The true measure of success is not just in profits, but in the trust and impact you foster.”
— Dr Aditya Vijay Kashyap



Today's Top 50 Business Headlines

1. Global markets rally on strong U.S. jobs data
2. Oil prices climb amid Middle East tensions
3. India's GDP growth forecasts upgraded
4. Apple unveils new AI features for iPhone
5. Xiaomi reports record quarterly smartphone sales
6. Tesla shares dip after weaker-than-expected delivery numbers
7. Microsoft Azure revenue growth outpaces rivals
8. Google's parent Alphabet invests in quantum computing
9. Amazon to open micro-fulfillment center in Mumbai
10. Reliance and BP expand green energy partnership
11. RBI maintains repo rate at 6.5%
12. India Inc. raises Rs. 10,000 crore via G-sec auctions
13. TCS beats earnings estimates with robust digital revenue
14. Infosys partners with AWS for cloud-led solutions

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15. Wipro acquires a European IT services firm
16. HDFC Bank reports stable NIM in Q1
17. ICICI Bank explores investment in fintech startup
18. Paytm launches new UPI-based merchant tool
19. Razorpay partners with Walmart for SME financing
20. Zomato expands dine-out services in Southeast Asia
21. Flipkart to pilot drone delivery in Karnataka
22. Ola raises \$200M for EV roll-out
23. Adani Group invests in renewable energy projects
24. NTPC commissions 500MW solar plant in Rajasthan
25. ONGC signs off-shore wind energy MoU
26. Tata Motors to export EVs to Europe
27. Mahindra & Mahindra launches next-gen tractor
28. Maruti Suzuki reports healthy domestic demand
29. Boeing secures large order from India's airline
30. Airbus begins pilot training facility in Delhi
31. SpiceJet postpones aircraft deliveries amid weak demand
32. Vistara eyes domestic expansion in Tier-2 cities
33. India's startup funding crosses \$10B YTD
34. Flipkart eyes acquisition of fintech player CreditMate
35. Paytm partners with SBI for merchant onboarding
36. Urban Company expands to Gulf Cooperation Council

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37. Locus Robotics enters Indian warehouse market
38. Swiggy pilots nano-fulfillment centres in Chennai
39. Global semiconductor shortage easing in Q3
40. TSMC to invest \$40B in next-gen chip plants
41. Nvidia unveils AI processors for cloud computing
42. AMD reports record data center revenue
43. Intel to launch 4nm chips in 2026
44. Google Data Studio adds advanced analytics
45. Zoom reports decline in subscription growth
46. Salesforce acquires AI-focussed analytics startup
47. Adobe integrates generative AI in Creative Cloud
48. Netflix to increase regional content investment
49. Disney+ India plans price hike in September
50. BYJU'S enters social learning platform space

“Scorpion Capital Insight” – Daily Investment Takeaway

Today's market environment signals a rotation from high-growth tech to value-oriented sectors, driven by investor appetite for stable earnings and rising interest rates. Takeaway: Focus on high-quality cyclicals—banks, industrials, and energy. Consider anchoring portfolios with corporate bond yields near 7%, while trimming select high-multiple tech names. Cryptocurrency exposure remains tactical, not core.

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Scorpion Capital's Special Market View

Scorpion Capital anticipates moderate global interest rate hikes continuing into Q4, with potential spillover into emerging markets including India. We see opportunities in defensive sectors—utilities and medical services—that may outperform in a higher-rate regime.

- Portfolio Positioning
- Increase allocation to energy mid-cap stocks trading at attractive cashflows.
 - Monitor consumer staples for hedging against volatility.
 - Maintain a 5–7% allocation to INR-hedged USD bonds to capture yield pick-up.

Disclaimer

This newsletter is intended for informational purposes only and does not constitute investment advice or an offer to buy or sell any securities. While we aim for accuracy, no warranty is made regarding completeness or timeliness. Investments involve risk—past performance is not indicative of future results. Please consult your financial advisor before making any investment decisions.

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