

Our News Your Views

Newsletter from the Desk of Dr. Aditya Vijay Kashyap

07 July 2025

Quote of the Day

“True wealth is the ability to convert obstacles into opportunities before others even notice the obstacle exists.” – Dr. Aditya Vijay Kashyap

Top 50 Business Headlines

1. Sensex crosses 82,800; Realty and Auto lead gains.
2. Oil steadies at \$78.4 amid OPEC+ output discipline talk.
3. RBI permits 24x7 instant INR–AED trade settlement platform.
4. India approves ₹28,000 cr semiconductor fab incentive tranche.
5. Tesla confirms Gurugram HQ; first Indian Model Y rollout 2026.
6. Vedanta to demerge aluminium, oil, and zinc verticals by Q4 FY25.
7. ISRO to launch Gaganyaan unmanned test flight on August 15.
8. India's FY25 GDP projection revised up to 7.1% by ADB.
9. Gold prices dip to ₹65,120/10g as dollar strengthens.
10. SEBI clears new T+0 stock settlement mechanism pilot.
11. JSW Steel to invest ₹4,000 cr in EV-focused steel solutions.
12. IMF warns of global debt surge; urges fiscal discipline.
13. Apple to unveil AI-powered Siri and iPhone 16 in September.
14. Nifty FMCG index hits all-time high on rural recovery bets.
15. Bharti Airtel partners Google for AI-based network optimization.
16. IndusInd Bank reports ₹2,143 cr Q1 profit, up 21% YoY.
17. Moody's reaffirms India's Baa3 rating; outlook stable.
18. Amazon opens largest fulfilment center in Maharashtra.

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19. UK CPI falls to 2.2%, Bank of England hints rate cut.
20. Zomato expands into rural delivery via bike riders.
21. Tata Motors plans ₹8,000 cr investment in EV ecosystem.
22. Reliance Retail to list on stock exchanges by FY26.
23. NTPC commissions 660 MW power unit in Jharkhand.
24. India forex reserves hit record \$657 billion mark.
25. CPI inflation eases to 4.7% in June; food prices stabilize.
26. BSE to introduce carbon credit trading platform.
27. Mahindra Lifespace buys ₹1,000 cr land parcel in Bengaluru.
28. India-UAE trade hits \$100 bn under CEPA pact.
29. Adani Green to develop 2,000 MW solar park in Gujarat.
30. Crypto bill likely in Parliament monsoon session.
31. Air India adds 30 international flights; focuses on US, UK.
32. Cochin Shipyard secures ₹2,500 cr defence export order.
33. Infosys opens AI innovation hub in Silicon Valley.
34. PNB Housing Finance Q1 profit up 32% to ₹435 cr.
35. UN projects India's 2025 population at 1.44 billion.
36. TCS to roll out AI chatbot for banking clients.
37. IMD predicts normal monsoon; boosts agri sentiment.
38. India to host G20 Fintech Summit in Bengaluru.
39. Yatra.com plans ₹500 cr IPO in September.
40. Biocon receives USFDA approval for cancer drug.
41. Paytm shares rise 8% on buyback buzz.
42. Ola Electric files DRHP for ₹7,000 cr IPO.
43. Maruti Suzuki to open EV factory in Gujarat by 2026.
44. SBI raises MCLR by 10 bps across tenures.
45. US Fed minutes suggest rate pause amid cooling jobs.
46. Patanjali to launch FMCG IPO for food division.

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- 47. Yes Bank appoints new chief risk officer.
- 48. India-Japan to co-develop lithium-ion battery supply chain.
- 49. Bitcoin stable at \$71k amid ETF optimism.
- 50. L&T bags ₹3,200 cr order in Middle East energy sector.
- 51. GIFT City sees \$2.1 bn FPI inflows in Q2 FY25.

Scorpion Capital Insight – Daily Investment Takeaway

We see increased capital flows into India's core sector and infra, with PSU banks outperforming peers. Private credit deals are rising, especially in last-mile real estate and SME funding. Stay bullish on capital goods and industrial automation names.

Scorpion Capital – Special Market View

- ****Equities:**** Focus on large-cap infra, capital goods, and energy PSUs. US tech likely consolidates.
- ****Fixed Income:**** Stick with 3–5 yr AAA NBFCs and sovereign green bonds.
- ****Commodities:**** Bullish bias on copper and aluminium; crude stays range-bound.
- ****Currency:**** INR range-bound; USD slightly firm; keep eye on JPY–BoJ dynamics.

Disclaimer

This newsletter is for informational purposes only and does not constitute investment advice. Scorpion Capital does not guarantee accuracy of data. Investors must perform their own due diligence.

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