



Our News Your Views

Newsletter from the Desk of Dr. Aditya Vijay Kashyap

Quote of the Day:

“The future doesn’t belong to the fearful. It belongs to those who can plan, prepare, and persist.” – Dr. Aditya Vijay Kashyap

Top 50 Business News Headlines – 12 July 2025

1. Silver hits record ₹113,000/kg on MCX amid global supply concerns
2. Tesla to open first showroom in India next week amid slowing global sales
3. JPMorgan may trim India and China weightings in its GBI-EM bond index
4. India leads global IPO boom, largest outside US with \$6.7B raised
5. Chandigarh residents spend crores on premium vehicle registration plates
6. Global markets navigate US inflation, Chinese GDP, and trade tensions
7. MP CM to tour UAE & Spain for industrial investment roadshows
8. Wall Street retreat on renewed tariff concerns
9. US tariffs on Canada reach 35%, triggering broader trade implications
10. SEBI bans Jane Street over market manipulation probe
11. RBI to hold ₹25,000 cr G-Sec buyback auction this week
12. India poised to overtake Germany/Japan as 3rd largest economy by 2026
13. FT flags Big Pharma’s patent cliff; India IPOs grab spotlight
14. UPITS roadshow in Hyderabad draws ₹500–600 cr interest

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15. Markets desensitized to Trump's tariff policy says CGS
16. Infosys quarterly profit up 11% beating analyst estimates
17. HDFC Bank launches new SME trade finance platform
18. Gold prices stabilize as dollar index weakens slightly
19. Vedanta to demerge aluminum and copper units into separate entities
20. NCLT clears merger of IDFC and IDFC First Bank
21. Oil hovers near \$70 amid OPEC+ output policy uncertainty
22. World Bank revises India GDP forecast to 7.2% for FY25
23. Paytm receives RBI nod for payment aggregator license
24. Adani Green signs \$1.2B funding agreement with global investors
25. India's EV market to grow 49% CAGR till 2030, says Deloitte
26. Zomato rolls out drone delivery pilot in NCR region
27. Moody's upgrades Tata Power outlook to Positive from Stable
28. Amazon announces \$2B investment in India fulfillment infra
29. India, UK resume FTA talks after elections in both countries
30. TCS to set up AI CoE with IIT Bombay collaboration
31. JSW Steel to acquire renewable assets worth ₹2,000 cr
32. Retail inflation eases to 4.8% in June 2025
33. SpiceJet plans fresh ₹1,000 cr equity raise for expansion
34. RIL launches AI-based predictive consumer behavior tool
35. Foreign exchange reserves rise \$4.3B to \$654B
36. Nifty hits 24,000 for first time led by energy and IT

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37. Axis Bank opens 100 new rural branches under Jan Samriddhi scheme
38. Maruti Suzuki unveils new electric SUV for Indian market
39. RBI proposes framework for tokenized wholesale CBDC pilot
40. Google to open second data center in Hyderabad
41. IMF team visits India for pre-budget fiscal assessment
42. Bharti Airtel tops 5G subscriber growth in Q2 2025
43. IRDAI mandates mental health coverage in all health policies
44. Vistara-Air India merger to complete by September 2025
45. Nykaa expands offline store presence across 8 tier-2 cities
46. WTO warns of growing protectionism among G20 countries
47. Nvidia partners with Indian startups for chip design program
48. India's net direct tax collections up 14.3% in Q1 FY25
49. Coal India to invest ₹30,000 cr in renewable energy by 2030
50. EaseMyTrip to enter hospitality business with hotel chain launch
51. HAL signs export MoU with Egypt's defense ministry
52. PM Modi to address Global Investment Summit in August

Scorpion Capital Insight – Daily Investment Takeaway

Despite tariff-driven volatility and commodity swings, India's infrastructure, renewable energy, and tech exporters maintain solid structural growth. Silver remains tactically attractive amid supply-demand imbalances.

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Scorpion Capital's Special Market View

- Equities: Stay overweight in infrastructure, defence, digital-tech; hedge tariff-sensitive cyclicals.
- Fixed Income: Build around 3–5-year AAA corporate bonds amid steady RBI stance.
- Commodities: Silver & copper remain strong; crude expected to hover at \$68–70/bbl.
- Forex: INR projected in 82.8–83.5 range; monitor US tariff shifts and rate dynamics closely.

Disclaimer

This newsletter is sourced and compiled by Scorpion Capital, New Delhi for informational purposes. It does not constitute investment advice. While based on reputable sources, data accuracy is not guaranteed. Please consult your financial advisor before making decisions.

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