



Our News Your Views

Scorpion Capital – Daily Global & India-Focused Finance Newsletter

Saturday, 19 July 2025

Quote of the Day

“Success usually comes to those who are too busy to be looking for it.”
— Henry David Thoreau

Top Global & India-Focused Finance Headlines

1. RBI to issue climate risk disclosure rules for banks by FY 2027–28.
2. NITI Aayog proposes easing limits on Chinese investments in Indian firms.
3. India's economy 'in good shape', but needs infra and trade deals.
4. ICICI & HDFC face earnings margin challenges amid RBI policy shifts.
5. SBI stock underperforms broader market by 0.64%.
6. UP Govt promotes ₹40 tn investor roadmap with policy push.
7. INR forward premium dips due to inflation divergence.
8. India-US trade deal talks stall, delaying clarity.
9. Top 5 richest Indians worth \$279.5 bn; far below Elon Musk.
10. India's retail inflation at 6-year low, RBI rate cuts expected.
11. RBI projects FY26 inflation below 3.7%.
12. June inflation lowest since Jan 2019.
13. RBI reverse repo ops mop up ₹1 tn liquidity.

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14. Indian markets rise as inflation softens.
15. YES Bank Q1 results expected today.
16. RBI keeps overnight rates stable via liquidity ops.
17. JP Morgan: liquidity surplus won't boost credit growth.
18. SBI hints at 25 bps repo cut potential in FY26.
19. Bharat Bandh may affect banks, stock trading.
20. FM backs GCC-India corridor, sees \$200 bn by 2030.
21. Income tax refunds up 5x, turnaround time just 17 days.
22. Pension funds seek looser bond exposure norms.
23. Digital Rupee pilot expands across banks.
24. UPI One World launched for G20 nations.
25. BRICS Summit sees India push 'Global South' reforms.
26. Union Budget 2025 raises tax-free slab to ₹12 lakh.
27. India-EU resolve digital trade policy gridlock.
28. Reliance Q1 profit up 78% on stake divestment.
29. Digital Rupee integrated with UPI – 15 banks live.
30. RBI announces ₹1 lakh crore VRRR auction.
31. RBI liquidity framework report expected July-end.
32. RBI MPC minutes show support for growth via rate cuts.
33. Global fixed income sees new inflows amid stability.
34. SBI MD predicts scope for rate easing.

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Scorpion Capital Insight

India is entering a high-opportunity phase of digital and fiscal transformation. With inflation cooling, RBI may pivot toward easing, while tech and FDI reforms make India a global capital magnet.

Market View

- Rates: RBI policy suggests softening stance.
- Equities: Buoyed by cooling inflation and strong earnings.
- Liquidity: VRRR & reverse repo operations ongoing.
- Fintech: Digital rupee pilots and UPI 2.0 enhance cross-border reach.
- FDI: Reforms and trade talks signal stronger capital flows ahead.

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