



Our News Your Views



Scorpion Capital Daily Business Newsletter

Date: Saturday, 02 August 2025

"Leadership is not about being in charge. It is about taking care of those in your charge." — Dr. Aditya Vijay Kashyap

Top 50 Business News Headlines

- 1. RBI holds repo rate steady at 6.50% citing inflation concerns.
- 2. India's exports rise 8.4% in July, driven by engineering and pharma sectors.
- 3. Nifty hits record high, closes at 24,500 amid strong earnings season.
- 4. SEBI to roll out T+0 settlement cycle for select stocks from September.
- 5. Reliance Jio plans \$3B green bond issue for 5G and AI expansion.
- 6. Adani Green secures \$1.5B funding from IFC-led consortium.
- 7. India, US in talks to co-develop critical semiconductor tech.
- 8. Rupee stable at 83.02/USD; FII inflows offset crude oil impact.
- 9. Apple to manufacture iPhone 17 entirely in India by 2026.
- 10. LIC Q1 profit jumps 22% YoY on robust premium collections.
- 11. Vedanta spins off renewable arm to tap into ESG-focused capital.
- 12. Morgan Stanley upgrades India to 'overweight' on macro resilience.
- 13. India's EV sales cross 1 million units in H1 2025: FADA report.
- 14. GST collections at ₹1.71 lakh crore in July, up 11% YoY.
- 15. Tata Steel posts ₹6,800 crore profit; announces \$1.2B capex plan.

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- 16. Flipkart eyes IPO in US by early 2026, target valuation \$60B.
- 17. Infosys announces \$1B AI fund for startups and innovation.
- 18. Crude oil trades at \$88/barrel on tight supply outlook.
- 19. Asian Development Bank approves \$2B line for Indian infra projects.
- 20. Airtel launches satellite broadband services in remote areas.
- 21. Uday Kotak: 'India can become world's financial back-office by 2030'.
- 22. BYJU'S sells US coding arm to reduce debt; raises \$250M bridge loan.
- 23. Maruti Suzuki plans EV rollout by Q3 2025.
- 24. NHAI to monetize ₹1.2 lakh crore worth of highways via InvITs.
- 25. IRCTC profit rises 36% as tourism and catering rebound.
- 26. Paytm sees record UPI volumes despite regulatory scrutiny.
- 27. RBI introduces digital rupee interoperability with UPI platforms.
- 28. India's forex reserves touch \$660 billion a new record.
- 29. HDFC Bank to expand Nepal, Sri Lanka operations via local JVs.
- 30. Ola Electric files DRHP for ₹9,000 crore IPO.
- 31. Wipro acquires London-based AI security firm for \$420M.
- 32. Tesla scouts for component vendors in India for Model 2.
- 33. BSE market cap crosses \$5 trillion for first time.
- 34. India inks FTA with EFTA bloc to boost pharma, gems exports.
- 35. NITI Aayog to launch 100 Smart Tech Manufacturing Zones.
- 36. Global gold prices rise to \$2,050/oz amid geopolitical tensions.
- 37. Indian startups raise \$1.3B in July, led by fintech and healthtech.

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- 38. SBI to launch green deposits product for ESG-conscious investors.
- 39. Amazon expands warehousing footprint in eastern India.
- 40. Government unveils new incentive scheme for data centers.
- 41. Nepal, India to jointly develop 1,200 MW hydropower plant.
- 42. IMD: Normal monsoon to support rural demand and agri output.
- 43. RBI flags risks in NBFC sector; urges tighter underwriting norms.
- 44. SoftBank trims stake in Zomato; still bullish on India long-term.
- 45. L&T bags ₹8,500 crore bullet train contract from NHSRCL.
- 46. India launches Sovereign Green Bond 2.0 for global investors.
- 47. Global pension funds eye Indian infra assets for long-term yield.
- 48. NCLT clears Reliance Capital resolution plan led by Hinduja Group.
- 49. Budget 2026 planning begins; focus on green infra and job creation.
- 50. India to surpass Germany as 3rd largest economy by 2027: IMF.

Scorpion Capital Insight

With global interest rate cycles peaking, it's an opportune time to lock in long-term funding and recalibrate asset allocations towards high-growth sectors like energy, infrastructure, and strategic tech alliances. Scorpion Capital recommends a sector-rotation approach over the next two quarters to maximize alpha.

Scorpion Capital Market View

India and South Asia continue to be strong outperformers, buoyed by structural reforms, geopolitical tailwinds, and investment momentum. We foresee continued strength in FMCG, banking, and infra stocks while maintaining caution on over-leveraged midcaps. In global markets, US tech continues its rebound, while EU remains range-bound amid political uncertainties.

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