



Our News Your Views

Scorpion Capital Daily Business Newsletter

Date: Saturday, 9 August 2025 (IST)
From the desk of: Dr. Aditya Vijay Kashyap

Quote by Dr. Aditya Vijay Kashyap

“In uncertain markets, discipline is alpha — process over prediction, risk before return.”

Top 50 Business & Markets Headlines

- 1) Wall St Week Ahead: Investors eye next week's US inflation print; some brace for a pause in the equity rally.
- 2) Global markets: Nasdaq touches new high; futures buoyed by tech as easing hopes offset tariff worries.
- 3) Gold shocker: US imposes tariffs on imported gold bars; futures jump and market structure jolts.
- 4) Emerging markets: EM stocks and FX slip as trade tensions resurface.
- 5) Oil: Prices steady after a choppy week; traders weigh reports of a prospective US-Russia deal path on Ukraine.
- 6) Global wrap: Equities firm into weekend; gold futures hit records on policy risk.
- 7) US yields: Treasury 10-year edges up ahead of data; on track for first weekly gain in three weeks.
- 8) US fund flows: Investors pull money from US equity funds; rotate to money markets amid tariff risk.
- 9) Semis: US said to license Nvidia to export some chips to China (policy nuance remains key for AI supply chains).
- 10) IFC – Oman: World Bank's IFC reportedly okays up to ~\$250m loan for an Oman polysilicon project despite US objections.

Dr. Aditya Vijay Kashyap

Founder & Principal Partner

+91-70116 39525

aditya@scorpioncapital.in

groupceo@tradeconnect.in

Corporate Office: - New Delhi

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- 11) D-Street yesterday: Sensex -765 pts; Nifty closed below recent highs as tariff jitters hit risk appetite.
- 12) Market commentary: India growth forecasts see near-term trims from tariff overhang; strategists flag uncertainty.
- 13) Opening cues: GIFT Nifty indicated a soft start into the weekend on Friday's close.
- 14) Sector watch: Experts say Nifty needs to hold key moving averages to reattempt 24,900.
- 15) Tariffs & macro: Base case drag seen manageable; 25% tariff could shave 0.3–0.4% off GDP, 50% ~0.7% (one house view).
- 16) Earnings diary (today): HBL Engineering, Olectra Greentech, Happy Forgings, Precision Wires, among others, to report Q1.
- 17) Fuel prices: Daily pump prices updated 6am; city-wise revisions tracked.
- 18) Banks & holidays: Raksha Bandhan today; bank operations vary by state — check RBI holiday calendar.
- 19) Travel: Railways runs special trains Aug 8–17 for festival rush.
- 20) States' sops: Multiple states offer free bus travel for women on Aug 9 for Raksha Bandhan.
- 21) Midcaps & flows: Five midcaps saw sharp Q1 drops in FII ownership; ownership churn in focus.
- 22) Autos & capex: Street watchers track commentary from Tata Motors/ancillaries post-results cycle for FY26 capex cadence.
- 23) Financials: PSU/large-bank earnings assessed for margin resilience into H2 FY26 amid rate expectations.
- 24) IT & AI: Vendor updates emphasize AI deal pipelines vs pricing pressure; watch large-cap guidance.
- 25) Metals: Global tariff narrative keeps steel & aluminum sentiment choppy; exports lens critical.
- 26) Chemicals: Input cost relief intermittent; specialty names guide cautiously on global demand.
- 27) Pharma: US generics pricing mixed; select firms see approvals tailwind.
- 28) Capital goods: Order books healthy; execution and working-capital discipline key as rates, FX swing.

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- 29) Renewables: Solar/wind tendering stays active; polysilicon supply headlines watched after IFC Oman news.
- 30) Logistics: Freight rate normalization continues; monsoon disruptions localized.
- 31) Trade tensions: Markets recalibrate after fresh US tariff actions and warnings of further sanctions risk.
- 32) Commodities: Gold futures/spot dislocation widens post-tariff, impacting refiners/traders.
- 33) Energy: Oil ends the week ~5% lower amid geopolitical headlines and demand concerns.
- 34) Equities: S&P 500 set for best week since June as tech strength offsets macro nerves.
- 35) Rates: Debate builds on where the US 10-year “new normal” settles; some analysts cite ~4.5%.
- 36) Funds: Rotation to cash-like assets persists as households and institutions seek carry with safety.
- 37) FX: EM FX under pressure; USD bid on safe-haven flows and rate differentials.
- 38) Tech trade: US chip export licensing to China remains a key watch-item for supply chains.
- 39) Europe: Risk assets track Wall St tone; rates repricing keeps financials in focus.
- 40) Mideast energy: Financing signals for upstream/solar manufacturing eyed after IFC Oman move.
- 41) Education ties: US govt-supported EducationUSA fairs run Aug 9–17 across India.
- 42) Festive demand: Retail footfalls, travel and gifting categories see seasonal bump; logistics bandwidth stretched.
- 43) Exporters: Companies assess hedging and market diversification amid tariff headlines.
- 44) Real estate: Residential launches steady; affordability shaped by rates, income growth.
- 45) Banks/NBFCs: Credit growth broad-based; deposit repricing pace a key margin variable.
- 46) Infra: Tendering momentum steady; EPCs monitor input costs and working-capital cycles.
- 47) Insurance: Persistency and product-mix trends tracked as yields move.
- 48) Airlines: Capacity additions continue; ATF price and INR trajectory in focus.

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49) Cement: Price discipline vs input cost curves under watch post-monsoon.

50) IT services: Hiring remains selective; AI projects in pilot-to-production transition at large clients.

Scorpion Capital Insight — Daily Investment Takeaway

Positioning for policy-driven dispersion:
- Near-term volatility is being driven by tariff policy and rate path uncertainty. We continue to favor quality compounders with domestic earnings drivers in India (banks with granular deposits, capital goods, select autos/ancillaries) and cash-rich global tech where earnings momentum persists.
- Gold: The US import tariff has created a futures/spot dislocation and potential basis risk. Physical-linked plays (refining/trading) may see margin volatility; portfolio gold exposure remains a risk hedge, not a return engine.
- Duration: With the US 10-year gravitating higher short-term, we prefer staggered duration adds over a single large bet; Indian duration remains a carry story for patient investors.
- Tactical: Into earnings, focus on clean balance sheets, pricing power, and export optionality but stress-test for tariff sensitivity.

Scorpion Capital — Special Market View

Base case (30–45 days): Choppy, range-bound indices with elevated cross-asset correlation; buy the dips in leaders, avoid crowded small-cap momentum until breadth improves.
India: Watch FII flow trends and Q1 commentary for FY26 capex visibility; domestic SIPs continue to cushion drawdowns.
Global: Policy headlines > macro this fortnight; if US CPI cools, risk assets likely stabilize even with tariff noise.

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