



Our News Your Views

SCORPION CAPITAL | DAILY BUSINESS NEWSLETTER

From the Desk of Dr. Aditya Vijay Kashyap

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“Clarity beats noise. Stay liquid, stay curious, and keep risk asymmetry in your favor.” — Dr. Aditya Vijay Kashyap

TOP 25 HEADLINES — with quick views

1. Asian stocks edge higher after 90-day U.S.–China tariff truce extension; Nikkei at record highs; traders eye U.S. CPI.
 - View: Risk-on tone likely lifts cyclicals in Asia; keep hedges as CPI could whipsaw rates expectations.
2. Oil ticks up as tariff pause underpins trade hopes; Brent near \$66.9; WTI around \$64.2.
 - View: Positive for OMCs’ inventory gains; watch USD strength and Russia risk for near-term volatility.
3. Debt market jitters resurface as credit spreads widen, prompting caution on richly valued tech.
 - View: Rebalance toward cash-generative defensives; barbell with select quality growth.
4. India pre-market: GIFT Nifty signals positive open; sentiment tracks Asia’s gains.
 - View: Gap-up open probable; fade euphoria into CPI—use strength to rotate into laggards with earnings visibility.
5. Stocks in focus: Medi Assist, SJVN, Ashoka Buildcon, Bata India, Adani Enterprises on company-specific newsflow.
 - View: Trade setup favors stock-specific action; keep stops tight in F&O-heavy counters.

Dr. Aditya Vijay Kashyap

Founder & Principal Partner

+91-70116 39525

aditya@scorpioncapital.in

groupceo@tradeconnect.in

Corporate Office:- New Delhi

Bengaluru | Guwahati | Hyderabad | Kolkata | Lucknow | Mumbai | Australia | Dubai | Indonesia | KSA | Mauritius | Singapore | UK | USA

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6. Indian indices rallied ~1% on Monday; Nifty closed ~24,585, Sensex ~80,604 on bank/auto strength.
 - View: Follow-through today hinges on global risk tone; watch PSU banks for leadership.
7. Hindalco in focus as Novelis Q1 net income drops 36% YoY to \$96m while sales rise 13%.
 - View: Mixed read; margins key—monitor guidance on can sheet demand and auto ramp.
8. Report suggests Indian equities returned ~124% (2019–2025), outpacing gold.
 - View: SIP discipline remains alpha; however, diversify across debt/intl to manage cycle turns.
9. RBI's latest VRRR saw softer bids amid easing overnight rates.
 - View: Liquidity comfortable; near-term money market rates may stay benign.
10. Bessemer India may offload entire 15.67% Medi Assist stake (~₹560 cr).
 - View: Supply overhang near-term; long-onlys can watch post-block price stabilization.
11. India 10-yr yield climbs toward ~6.44%, steepest since April.
 - View: Prefer shorter duration; add duration only after CPI clarity.
12. Jewellery firms' IPO pipeline heats up on robust margins and organized shift.
 - View: Selective participation only—watch working-capital intensity and gold price sensitivity.
13. PG Electroplast slides ~35% in 5 days on weak guidance.
 - View: Avoid fresh longs until earnings reset is fully priced.
14. UNO Minda on radar for fresh 52-week highs; technicals constructive.
 - View: Auto ancillaries with EV exposure remain tactical buys on dips.
15. FT round-up: AXA IM said to eye stake in Telefónica's Spanish fibre venture.
 - View: Private capital still hungry for infra-like cash flows; positive for European telco deleveraging.
16. FT: Trump says U.S. will not impose tariffs on gold imports.
 - View: Could soften bullion's risk premia at the margin; INR-gold tracks USDINR more than policy headlines.
17. FT: Brussels clears €4.1bn Prosus acquisition of Just Eat Takeaway.
 - View: Consolidation in food delivery remains complex; synergy realization will be watched.
18. Oxford Nanopore CEO to step down after two decades, per FT.
 - View: Leadership transitions often create entry windows if science and pipeline are intact.
19. Reuters 'Trading Day': Tariffs/CPI nerves still in focus for global assets.
 - View: Expect choppy FX; DXY path will steer EM flows.

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20. Bloomberg wrap: Asian shares extend gains on tariff truce extension; RBA in focus.
 - View: AUD and ASX reactions will hint at policy path sensitivity across APAC.
21. ET live: GIFT Nifty up ~26 pts; positive start likely.
 - View: Don't chase gap-ups; staggered entries preferred.
22. ET: Asian stocks advance ahead of U.S. CPI; Nikkei climbs.
 - View: Japan tech strength tied to AI capex—watch semiconductor supply chain prints.
23. ET: Indian equities gained 1% amid SBI profit beat and geopolitics optimism.
 - View: Bank earnings still key driver; monitor credit costs guidance.
24. ET: Fusion Finance to step up MSME lending; expects stronger Q3.
 - View: MSME credit demand supportive for NBFCs; funding costs are the swing factor.
25. ET: Adani Enterprises, Bata, SJVN among stocks to watch today.
 - View: Event-driven trades—use risk-defined strategies.

SCORPION CAPITAL INSIGHT — Today's Takeaway:

Use the tariff-truce-led risk-on bounce to rebalance. Keep a barbell: high-quality defensives for cash flow and selective AI/auto-linked cyclicals for upside. Stay nimble into U.S. CPI; prefer staggered buys and risk-defined options strategies over outright leverage.

SCORPION CAPITAL — Special Market View (Short Term | 1–2 weeks):

Nifty 50 support ~24,250–24,300; resistance ~24,800–24,900. USDINR likely 83.0–83.7 range with DXY sensitivity. Crude stable-to-firm; add OMCs on dips; avoid duration extension in bonds until inflation print.

DISCLAIMER:

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