



Our News Your Views

SCORPION CAPITAL – Daily Newsletter

Date: 18 August 2025 | Asia/Kolkata (IST)

Top 25 Business Headlines

1. Tesla slashes UK monthly lease fees amid sales slump (up to ~40% discounts reported). (Reuters)
2. Australian regulator (ACCC) sues Google over anti-competitive Android search deals; A\$55m penalty proposed. (Reuters)
3. China keeps adding crude to storage even as refinery runs rise; July surplus ~530,000 bpd. (Reuters)
4. Oil slips in early Asia as Russia supply fears ease after US–Russia summit. (Reuters/Bloomberg)
5. Global markets: Asia mixed, S&P 500 futures steady; Brent dips; dollar little changed. (Bloomberg)
6. Gold holds weekly decline on sticky US inflation; Fed cut odds trimmed. (Bloomberg)
7. FT-Nikkei index: Tampa tops US cities for foreign business expansion; Texas metros slip. (Financial Times)
8. Asian shares nudge higher on rate hopes; focus turns to Powell/Jackson Hole this week. (Reuters)
9. US–India trade talks slated for Aug 25–29 called off; tariff overhang persists. (Reuters)
10. India proposes sweeping GST overhaul by October: move to two slabs (5% & 18%). (Reuters)
11. Govt says fiscal deficit target (4.4%) still achievable despite planned GST cuts. (Reuters)
12. S&P upgrades India's sovereign rating to BBB from BBB-; cites consolidation and reforms. (Reuters)

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13. 13. India's long-bond rally fades as fiscal risks rise; yields back up after June cut. (Reuters)
14. 14. Corporate bond fundraising set to hit new highs as firms chase lower-cost capital. (Reuters)
15. 15. RBI leaves repo at 5.50% and stance neutral; cumulative 100 bps cuts this year. (Mint)
16. 16. Rupee ends slightly stronger post-policy; closes near 87.73 per USD. (Business Standard)
17. 17. Forex reserves fall \$9.3 bn to ~\$688 bn for week ended Aug 1 on RBI dollar sales. (Business Standard)
18. 18. Rupee, forward premiums firm after cooler US inflation; Fed cut bets support. (Reuters)
19. 19. India recalibrates expectations on US trade deal amid tariffs, geopolitics. (Business Standard)
20. 20. After Putin summit, Trump speaks to Zelenskyy/NATO; no Ukraine deal yet. (Business Standard)
21. 21. India & China discuss resuming border trade after five years. (Reuters)
22. 22. MakeMyTrip outlines global expansion push; focus on corporate travel. (Business Standard)
23. 23. KEC International in focus after multi-crore order book update. (Mint)
24. 24. US Markets: what to expect Monday (Aug 18) for S&P 500, Nasdaq, Dow. (Economic Times)
25. 25. Crypto watch: Bitcoin/XRP outlook for Monday, Aug 18. (Economic Times)

Final Views – From the desk of Dr. Aditya Vijay Kashyap

- Consumption tailwind: The proposed GST reset (two-rate structure) is a strong signal to boost mass-market demand. Near-term fiscal math looks tight, but the growth impulse for FMCG, durables and autos should outweigh the drag by Q4 FY26.
- Macro credibility: S&P's upgrade to BBB reinforces India's reform and consolidation narrative. Expect structurally lower risk premia over 6–12 months, supporting foreign inflows into G-Sec (index inclusion) and high-grade corporate bonds.

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- Rates & liquidity: With the RBI pausing at 5.50% after front-loaded cuts, the bar for further easing is higher. Stay duration-neutral; prefer 3–5Y corporates where supply–demand remains favorable versus long bonds facing fiscal-supply headwinds.
- FX: Rupee volatility remains a function of US tariff headlines and oil. Brent easing is a cushion; watch reserves trajectory and RBI's intervention cadence. Prefer partially hedged USD liabilities.
- Global risk matrix: Oil slippage and gold stagnation reflect a market pivot to geopolitics (US–Russia–Ukraine) and US inflation path. Maintain diversified commodity exposure; avoid over-concentration in a single macro bet.
- Equities: Domestic cyclical tied to consumption and public capex stay constructive. Exporters with US exposure face headline risk but benefit from a softer rupee. Accumulate on declines rather than chase gap-ups.
- Flows: Corporate bond primary is crowded—be selective on covenants and structures. Avoid yield-chasing in sub-AA without adequate security and cash-flow comfort.

Disclaimer

This newsletter compiles headlines from reputed financial media and adds independent market views for informational purposes only. It is not investment advice or a solicitation to buy/sell securities. Please consult your professional advisor before making investment decisions.

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