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Daily Business Newsletter — August 21, 2025

From the Desk of Dr. Aditya Vijay Kashyap

“In volatile markets, clarity beats speed. Act with discipline, not impulse.” — Dr. Aditya Vijay Kashyap

Top 25 Business & Markets Headlines

1. RBI MPC minutes flag U.S. tariff risks; repo rate held at 5.50% with neutral stance. *(Reuters, Aug 20, 2025)*
2. Mint editorial: MPC's 'wait-and-watch' stance affirmed amid trade and inflation uncertainty. *(Mint, Aug 21, 2025)*
3. MPC minutes indicate inflation could re-accelerate above 4% in FY26; members cite base effects. *(Business Standard, Aug 20, 2025)*
4. Lok Sabha clears Online Gaming Bill, 2025; blanket ban on real-money games passed. *(Economic Times, Aug 20, 2025)*
5. Gaming startups prepare Supreme Court challenge to real-money gaming ban. *(Mint, Aug 20, 2025)*
6. Poll: India stocks seen posting modest gains; FPI outflows and new U.S. tariffs cloud outlook. *(Reuters, Aug 21, 2025)*
7. Indian equities notch five-day rally ahead of Jackson Hole; tech and consumer lead. *(Reuters, Aug 20, 2025)*
8. Trade setup: Listless open eyed; Jackson Hole and global cues in focus. *(Business Standard, Aug 21, 2025)*
9. Rupee edges lower as foreign banks' dollar sales offset greenback demand. *(Reuters, Aug 20, 2025)*
10. Dollar drifts as markets weigh Fed independence ahead of Powell's Jackson Hole speech. *(Reuters, Aug 21, 2025)*

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11. Oil holds gains after largest U.S. crude stockpile draw since mid-June. *(Bloomberg, Aug 21, 2025)*
12. UK CPI rises to 3.8% YoY in July; sterling firms on inflation surprise. *(Reuters, Aug 20, 2025)*
13. Tech-led selloff keeps Wall St subdued; Nvidia results next week in focus. *(Reuters, Aug 20, 2025)*
14. U.S. producer prices post biggest jump in three years, stoking inflation concerns. *(Reuters, Aug 14, 2025)*
15. BoE cuts Bank Rate to 4% amid mixed growth and sticky inflation signals. *(Reuters, Aug 7, 2025)*
16. Aurobindo Pharma said to lead \$5.5bn bid for Zentiva; company says talks non-binding. *(Reuters, Aug 21, 2025)*
17. Adani to build \$3bn, 2.4 GW coal power plant in Bihar—largest private coal project in a decade. *(Reuters, Aug 7, 2025)*
18. India curbs solar output temporarily to stabilise grid amid low demand, says ministry. *(Reuters, Aug 19, 2025)*
19. JSW Cement lists at ~\$2.38bn valuation; shares gain ~4% on debut. *(Reuters, Aug 14, 2025)*
20. SEBI proposes phased restructuring of derivative-linked indices to curb manipulation. *(Reuters, Aug 18, 2025)*
21. SEBI moots easier IPO rules for mega-firms with smaller float, extended PSM timelines. *(Reuters, Aug 18, 2025)*
22. U.S.-India trade talks slated for late August called off; tariff relief hopes fade. *(Reuters, Aug 16, 2025)*
23. Indian bonds slip as proposed GST revamp stirs fiscal worries. *(Bloomberg, Aug 18, 2025)*
24. Reliance warns tariff jitters could disrupt global energy supply-demand balance. *(Reuters, Aug 7, 2025)*
25. Aviation oversight under scrutiny as lawmakers flag staffing gaps after fatal crash. *(Reuters, Aug 20, 2025)*

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Final Views — From the Desk of Dr. Aditya Vijay Kashyap

Macro: The MPC's pause keeps liquidity and rates stable while tariff uncertainty plays out. We see near-term two-way volatility around Jackson Hole and U.S. data. UK's hotter CPI and firm U.S. PPI keep inflation risk alive globally.

Equities: Maintain a cautiously constructive stance on large-cap banks, diversified industrials, and exporters with USD revenues. Use 3–4 tranches for any fresh allocations; avoid momentum chasing in expensive pockets of tech until earnings visibility improves. Domestic gaming names face headline/regulatory risk after the Lok Sabha's real-money gaming ban—expect near-term de-rating and ad-spend cuts across the ecosystem.

Rates & FX: Bond yields may stay range-bound; any sharp dip on policy hopes is an opportunity to add duration gradually. INR likely oscillates with the DXY and crude; hedged export books and prudent import cover remain advisable.

Commodities: Brent near the mid-\$60s eases input pressure for OMCs and logistics, but supply headlines can whipsaw prices. Prefer staggered procurement and inventory discipline.

Tactical: Stick to asset allocation. Focus on quality balance sheets, cash flows, and pricing power. Keep 10–15% cash or equivalents for opportunistic adds on corrections.

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