

Our News Your Views

Scorpion Capital — Daily Business Newsletter

02 September 2025

From the Desk of Dr. Aditya Vijay Kashyap

Top 25 Business Headlines

1. India's GDP growth surprises at 7.8% in Q1 FY26 amid inflationary pressures and trade uncertainties.
2. Deutsche Bank to exit India's retail banking space, selling its 17-branch network to strategic buyers.
3. U.S. Treasury indicates optimism on resolving trade tensions with India after SCO Summit discussions.
4. 18 major Indian companies go ex-dividend today; investors advised to track payout timelines.
5. India boosts Russian oil imports despite global tariff pressures to secure energy security.
6. PNB and Bank of India cut MCLR lending rates to encourage credit growth in a tightening market.
7. Analysts pick Hero MotoCorp, Hyundai India, IGL, Maruti Suzuki, and BEL as today's top stock bets.
8. Sensex surges 555 points; Tata Motors, M&M lead gains while FMCG counters consolidate.
9. Financial Express highlights rapid fintech adoption reshaping India's payment infrastructure.
10. IMD forecasts heavy rainfall across northwest India; urban centres prepare for flood mitigation.
11. Kotak Mahindra Bank appoints Paritosh Kashyap as Executive Director to lead corporate banking.
12. IPO rush continues: Tata Capital, OYO, and LEAP India file DRHPs for aggressive expansion plans.
13. India, UAE aim to scale non-oil bilateral trade to \$100 billion by 2030 under CEPA framework.
14. Vedanta's demerger faces objections from SEBI; NCLT hearing postponed to 17 September.
15. Hindustan Zinc announces ₹3,823 crore investment in sustainable tailings reprocessing facilities.
16. SEBI revises derivatives expiry cycles effective today to curb speculative volatility.

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17. GIFT Nifty indicates positive opening; oil steadies amid global market uncertainties.
18. NHPC approves ₹10,000 crore borrowing plan to fund renewable energy infrastructure projects.
19. UPI One World expands cross-border reach; enables G20 travellers seamless airport transactions.
20. RBI projects private sector capex to rise 21.5% to ₹2.67 lakh crore in FY26, led by infrastructure growth.
21. Life sciences GCCs expand with 23 of top 50 global pharma firms building advanced R&D hubs in India.
22. ET Startup Awards 2025 recognise India's most innovative ventures driving next-gen business models.
23. GST refunds worth ₹1,600 crore to be cleared before Diwali, improving liquidity for traders.
24. Digital rupee pilot accelerates; RBI targets cross-border settlements and retail deployment by FY27.
25. US-India tariff standoff deepens; policymakers urge diversification of export markets.

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

India continues to balance resilience and reform amid evolving global headwinds. The GDP beat underscores macro stability, but external pressures — from rising tariffs to currency depreciation — require policymakers to remain agile.

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| Key | Highlights: |
| • **Sustained Growth** — With Q1 GDP growth at 7.8%, India demonstrates strong fundamentals despite | volatility. |
| • **Trade Diversification** — Strategic FTAs, especially the India-UAE CEPA and UK partnerships, support | export resilience. |
| • **Innovation Edge** — Expanding GCC hubs, startup recognitions, and digital infrastructure reflect India's | innovation-led transformation. |
| • **Investor Outlook** — Defensive sectors, renewable energy, fintech, and cross-border digital platforms remain key growth drivers. | |

India's economic narrative remains robust: a story of adaptive policymaking, technological advancement, and strategic global integration driving long-term stability.

Disclaimer

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