



Our News Your Views

Scorpion Capital — Daily Business Newsletter

23 September 2025

From the Desk of Dr. Aditya Vijay Kashyap

Top 25 Business Headlines

1. India's Supreme Court seeks government response on plea for independent Air India crash probe.
2. India & ADB sign \$125 million loan pact for urban services & climate resilience in Assam.
3. Trump's \$100,000 H-1B visa fee crackdown upends Indian IT industry's playbook.
4. India pushes for critical minerals (lithium, copper) supply from Peru, Chile & Argentina, seeks FTAs to secure supply chains.
5. India's banking liquidity crunch likely temporary, say analysts.
6. India seeks WTO consultations with Indonesia over proposed duty on cotton fabric.
7. India's national cricket team gets Apollo Tyres as lead sponsor, replacing Dream11.
8. India's rice stocks reach record; wheat at four-year high amid strong procurement.
9. UP launches GST Reform Awareness Campaign to boost Swadeshi and festive economy.
10. Japan's R&I upgrades India's sovereign rating to BBB+ (stable outlook), citing growth & fiscal discipline.
11. Foreign Portfolio Investors pull ~₹7,945 crore from Indian equities in September; net outflow for year ~₹1.38 lakh crore.
12. India's borrowing plan for FY26 second half unchanged, says Chief Economic Adviser.
13. Indian IT stocks slide after US visa crackdown; firms reduce reliance on H-1B.
14. India plans minority stake sales in half a dozen state firms.
15. India's August merchandise trade deficit narrows; export drop offset by lower imports.
16. Indian shares rise for a third week as Fed rate cut and US trade talks lift sentiment.

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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17. Viksit Bharat 2047: Goldman Sachs partners with IIMs to empower women entrepreneurs under “10,000 Women”.
18. Assam gets \$125 million from ADB for urban services & climate resilience, benefiting ~3.6 lakh people.
19. India eyes critical minerals (lithium, copper) from Peru, Chile, Argentina; pushing FTAs to secure supply.
20. Radisson Hotel Group to expand with new hotels in Delhi, Mount Abu, Indore & Sasan Gir.
21. Asian stocks cautious after visa fee hikes; oil & gold edge up; dollar steady.
22. Stock market: Nifty50 ends near 25,200; Sensex down 450+ points as IT sector reacts to H-1B fee changes.
23. India’s Gokaldas Exports looks to offset U.S. tariffs via EU & African expansion.
24. India to build first private strategic petroleum reserve; Megha Engineering gets ₹5,700 crore contract.
25. Fitch revises India’s GDP forecast for FY2025-26 upward to 6.9%, expecting another RBI rate cut this year amid solid domestic demand.

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Dr. Aditya Vijay Kashyap
Founder & Principal Partner
+91-70116 39525
aditya@scorpioncapital.in
groupceo@tradeconnect.in

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

India's business landscape is simultaneously facing opportunities and risks. Domestically, GST reforms, sovereign upgrades, and steady output in agriculture provide confidence. Globally, the H-1B visa fee hike, trade tensions, and supply chain disruptions in critical minerals are major challenges.

Strategically, investors must balance optimism in domestic demand-driven sectors like FMCG, infrastructure, and banking, with caution in export-reliant IT and manufacturing segments. Policy-driven reforms will likely create structural opportunities for long-term gains, but near-term volatility will remain high.

A balanced approach — selective exposure, hedging against external risks, and readiness to capitalize on dips — is the key to navigating the current environment.

Disclaimer

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Dr. Aditya Vijay Kashyap
Founder & Principal Partner
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aditya@scorpioncapital.in
groupceo@tradeconnect.in

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