



Our News Your Views

Scorpion Capital — Daily Business Newsletter

26 September 2025

From the Desk of Dr. Aditya Vijay Kashyap

Top 25 Business Headlines

1. RBI maintains repo rate at 6.5% citing inflation risks; growth outlook steady.
2. Sensex rises 420 points; IT and banking lead the rally.
3. Brent crude dips below \$86 per barrel as OPEC output talks progress.
4. India's fiscal deficit narrows further to 5.5% of GDP in FY25.
5. Government sets ambitious ₹1.5 lakh crore divestment target for FY26.
6. SEBI introduces stricter ESG disclosure norms for listed firms.
7. Mutual fund inflows top ₹1.6 lakh crore in September 2025.
8. Rupee trades at 88.60/USD; stabilises after recent record low.
9. Gold prices ease as dollar gains strength globally.
10. Tata Steel unveils ₹25,000 crore green hydrogen steel project.
11. Adani Green secures \$1.5 billion loan for renewable projects.
12. India's services exports cross \$345 billion in FY25.
13. HUL posts 15% growth in Q2 net profit on rural demand boost.
14. Maruti Suzuki unveils compact EV priced under ₹10 lakh.
15. NBFC loan growth accelerates to 20% YoY amid festive demand.
16. India, UK to resume stalled trade talks next month.
17. Reliance Jio Financial eyes \$5 billion IPO in FY26.
18. Infosys inks \$2.5 billion contract with U.S. healthcare giant.
19. IndiGo places order for 150 new aircraft to expand global network.

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20. IMF projects India's GDP growth at 6.6% for 2026.
21. Gross NPAs of Indian banks fall to 2.8%, lowest in 12 years.
22. US Fed signals prolonged high interest rate policy stance.
23. LIC collects record ₹2.3 lakh crore in premiums in H1 FY25.
24. Indian startups raise \$2.8 billion in September 2025 funding.
25. Government unveils ₹45,000 crore semiconductor incentive scheme.

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

The Indian economy continues to showcase resilience with steady fiscal consolidation, robust domestic demand, and strong capital inflows. However, external risks—particularly high U.S. interest rates, volatility in crude prices, and currency fluctuations—remain challenges for policymakers and investors.

Domestic reforms, such as GST 2.0, renewable energy expansion, and semiconductor policy, signal long-term structural strength. At the same time, external trade negotiations and global capital flow dynamics will dictate short-term volatility.

For investors, a diversified strategy is prudent: overweight sectors linked to domestic consumption, infrastructure, and green energy, while hedging export-oriented and IT positions against global uncertainty. Resilience and agility are the cornerstones of navigating this phase.

Disclaimer

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