



## Our News Your Views

### Scorpion Capital — Daily Business Newsletter

03 October 2025

*From the Desk of Dr. Aditya Vijay Kashyap*

#### Top 25 Business Headlines

1. RBI holds key rates steady, signals vigilance on inflation trajectory
2. Sensex and Nifty rebound as banking and IT stocks gain momentum
3. US Fed minutes suggest prolonged higher rates stance
4. Global crude oil prices soften on demand concerns
5. Rupee closes marginally stronger against US dollar
6. Gold continues upward trend amid geopolitical uncertainty
7. Bond market stable as traders await inflation data
8. India Inc raises record funds through Q3 IPOs
9. SEBI tightens ESG disclosure norms for listed firms
10. Services PMI indicates robust expansion in September
11. China factory activity steadies after months of contraction
12. European markets edge higher on easing recession fears
13. Wall Street posts gains led by tech and energy stocks
14. Tata Steel announces capacity expansion plans
15. Infosys unveils AI-driven solutions for global clients
16. Reliance explores new partnerships in green hydrogen
17. Adani Group set to commission new renewable projects
18. Indian startups raise fresh capital despite global slowdown
19. Nomura upgrades India's GDP forecast for FY26

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20. IMF flags risks of global slowdown amid trade wars
21. UK inflation eases, strengthening case for BoE rate cuts
22. Japan rolls out fiscal stimulus package worth \$200 bn
23. Dollar weakens as investors reassess Fed policy outlook
24. Indian banks report strong credit growth in September
25. Experts recommend cautious optimism amid volatile conditions

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

Today's market landscape continues to showcase resilience despite global turbulence. Strong domestic demand and robust credit growth remain the foundation of India's economic momentum. However, inflationary pressures and external uncertainties call for a disciplined approach.

Key	Outlook	&	Strategy:
- Favor large-cap stocks	with steady earnings	visibility	and sound governance.
- Monitor IT and financial	sectors	for	near-term leadership.
- Avoid overexposure to cyclical	sectors	until clarity on	global demand emerges.
- Keep tactical cash buffers	to	navigate	sudden volatility.

Conclusion: India's growth story remains strong, but vigilance is critical. Balancing optimism with caution is the way forward for investors.

### Disclaimer

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