

Our News Your Views

Daily Business Newsletter

Date: Thursday, 16 October 2025

Top 25 Business Headlines

1. Google to invest \$15 billion in AI hub in India (Visakhapatnam)
2. Oil prices rise ~1% after Trump says India pledged to stop buying Russian oil
3. India set for blockbuster IPO month with \$5 billion listings
4. Tata Group faces cyberattacks, boardroom conflicts, value erosion
5. Hyundai to invest ₹45,000 crore over 5 years, launch 'Genesis' initiative
6. Leadership change at Hyundai India; \$5 billion investment plan unveiled
7. India's exports to the US drop nearly 12% in September
8. Stocks in focus: Axis Bank, Infosys, Wipro, Hyundai, RBL Bank, Angel One, Jio Financial
9. RBI governor underscores India's growth prospects despite tariff worries
10. RBI: India an 'anchor of stability,' warns global trade policies could harm economies
11. India poised to contribute ~20% of global GDP growth; resilient to external shocks
12. \$300 million deal: CMA CGM orders six LNG-powered container ships from India
13. United Kingdom positions itself as India's premier partner for finance & fintech
14. India sees \$8 billion IPO rush expected in year-end quarter
15. Trade setup and technicals: key support/resistance levels for Nifty & Bank Nifty
16. Breakout stocks to watch: Manorama Ind, Aditya Infotech, Allied Blenders, KIMS, TD Power
17. Stocks to watch today: Infosys, Wipro, Axis Bank, Jio Fin, Nestle among others

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18. Market outlook: Sensex, Nifty open positive amid global cues; IPO and earnings in focus
19. Trade setup: bulls staging comeback; resistance near 25,670, support zone 25,050–25,150
20. Indian trade deficit widens as imports surge; exports show pockets of strength
21. Global Fintech Fest 2025 spotlights AI, innovation, inclusion in financial tech
22. 6G push: India signs Delhi Declaration, aligning with global bodies for future telecom framework
23. U.S.–India trade tensions deepen; 2025 diplomatic & tariff crisis continues
24. Market analysts name top stock picks for today (Raja Venkatraman)
25. Tata & other conglomerates under scrutiny amid governance, cyber, and strategic stress

From the Desk of Dr. Aditya Vijay Kashyap

Today's global and domestic developments reaffirm that we are navigating a phase where agility, structural clarity, and strategic positioning matter more than ever.

Geopolitical & Energy Realignment:

The announcement about India halting Russian oil purchases — if confirmed in execution — is a tectonic shift. This will upend trade flows, challenge energy security assumptions, and accelerate recalibration across supply chains.

Equity & Capital Markets Pulse:

The IPO surge continues to signal investor confidence — especially domestically driven. Yet valuations will be tested, especially with looming rate and inflation risks. Selectivity is essential: look for listings with strong moats, balance sheets, and defensive underpinnings.

Macro & Policy Backdrop:

The RBI's emphasis on stability, growth, and calibrating trade headwinds is timely. India's macro foundations—domestic demand, fiscal prudence, financial inclusion—are sources of resilience. But global fragmentation and protectionism are nontrivial dangers.

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Technology & Infrastructure:

The Google AI investment and 6G momentum signal India is increasingly at the crossroads of the next industrial wave. Capital allocation toward data, energy, telecom, semiconductor, and AI infrastructure is now strategic, not speculative.

Risk & Opportunity Framework:

Volatility is the new normal. As markets swing, opportunities arise in quality cyclical names, “future infrastructure” plays, and dislocations in undervalued segments. Maintain discipline on leverage, exposure, and hedges.

Closing Reflection:

In these uncertain times, the advantage lies with investors who see beyond near-term noise and align with structural themes. The next wave will reward those who anticipate direction, not those who merely ride momentum.

Warm regards,

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