



## Our News Your Views

### SCORPION CAPITAL – DAILY BUSINESS NEWSLETTER

Date: 29 October 2025

#### Top 25 Business & Financial Updates (Summarised)

1. Global markets trade steady as investors monitor inflation data and central bank commentary.
2. India's equity indices show resilience backed by strong domestic inflows and selective sector rotation.
3. US tech sector gains momentum driven by continued demand for AI and cloud computing services.
4. Gold prices remain range-bound with safe-haven buying countered by firm bond yields.
5. Oil prices stabilize amid mixed demand signals and production adjustments.
6. RBI maintains calibrated liquidity stance to support growth while ensuring inflation control.
7. Corporate earnings highlight strength in banking, industrials, and auto sectors.
8. Renewable energy investments accelerate with supportive policy frameworks.
9. Private equity interest increases in healthcare and infrastructure platforms.
10. Manufacturing firms expand capacity driven by export diversification strategies.
11. Consumer sentiment improves with festive season demand trends holding firm.
12. IT services firms secure new contracts in cybersecurity and data modernization.
13. Logistics and warehousing sectors report strong leasing momentum.
14. EV industry continues expansion with new charging infrastructure rollouts.
15. Pharma exporters see higher demand from regulated markets.
16. Commodity markets show mixed trends with metal demand tied to capex cycles.
17. INR remains stable supported by central bank operations and steady foreign flows.

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18. Data center and cloud infrastructure investments surge with digital transformation demand.
19. Corporate governance and risk management remain key investor evaluation criteria.
20. Real estate commercial segment shows improved leasing activity.
21. Debt market participants monitor global rate cycle shifts.
22. Public and private sector banks report improved credit quality and recovery performance.
23. Consumer credit growth remains healthy across retail lending segments.
24. Global capital flows remain supportive for emerging markets with strong macros.
25. Structural reforms across taxation, logistics, and finance continue to enhance India's growth outlook.

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

India's economic and market outlook remains constructive with strong domestic drivers, healthy capital flows, and continued policy support. However, disciplined portfolio allocation remains essential as global uncertainties, commodity volatility, and inflation expectations continue to influence sentiment.

At Scorpion Capital, we recommend a focus on high-governance, cash-flow strong companies with strategic positioning in technology, financial services, industrials, and renewable sectors. Maintaining balance across risk and return factors while prioritizing long-term value creation remains key.

— Dr. Aditya Vijay Kashyap  
Founder & Principal Partner, Scorpion Capital

*Prepared by: Scorpion Capital – Global Research Desk*

*Disclaimer: This document is for informational purposes only and not investment advice.*

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