



Our News Your Views

SCORPION CAPITAL – DAILY BUSINESS NEWSLETTER

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Top 25 Business & Financial Headlines (Summarised)

1. Global markets remain steady as investors await central bank policy commentary and key inflation data.
2. Indian stocks maintain resilience backed by strong domestic institutional inflows.
3. US tech giants continue rally supported by AI, cloud, and semiconductor demand trends.
4. Gold prices rise modestly on renewed safe-haven interest amid geopolitical uncertainties.
5. Crude oil stabilises as mixed future demand signals offset supply adjustments.
6. RBI emphasises balanced liquidity approach while keeping inflation under close watch.
7. Corporate earnings highlight strong performance across banks, industrials, and auto segments.
8. Renewable energy sector sees accelerated investments with supportive policy momentum.
9. Healthcare and infrastructure sectors attract increasing private equity participation.
10. Manufacturing firms expand capacity supported by export diversification strategies.
11. Consumer sentiment continues improving ahead of festive season demand strength.
12. IT services win new global digital transformation contracts, improving deal pipelines.
13. Logistics and warehousing continue strong leasing trends driven by e-commerce demand.
14. India's EV ecosystem expands with significant progress in charging infrastructure.
15. Pharmaceutical exports to regulated markets rise, though margin pressures persist.
16. Industrial metals show cyclical movements linked to capital expenditure patterns.

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17. Rupee remains relatively stable supported by domestic flows and central bank action.
18. Data center investments surge on digital transformation trends and cloud adoption.
19. Corporate governance and sustainable risk practices continue to influence capital allocation.
20. Commercial real estate leasing shows growing momentum in major metro corridors.
21. Debt markets fluctuate in response to shifting global rate expectations.
22. Banking sector asset quality strengthens with improved credit discipline.
23. Retail lending and consumer credit continue to expand steadily.
24. Global capital flows remain constructive for emerging markets with strong fundamentals.
25. Structural reforms in taxation, logistics, and financial markets continue to support long-term growth outlook.

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

India's macroeconomic outlook remains stable with strong domestic drivers and reform momentum, despite global uncertainties around inflation and interest rate trajectories. A disciplined and balanced investment approach remains essential at this stage of the cycle.

We continue to recommend prioritising companies with strong governance, predictable cash flows, and strategic positioning across technology, financial services, industrial growth and renewable energy clusters.

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

Prepared by: Scorpion Capital – Global Research Desk

Disclaimer: This document is intended for informational purposes only and does not constitute investment advice.

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