



Our News Your Views

Daily Business Newsletter

Date: 01 November 2025

From the Desk of Dr. Aditya Vijay Kashyap

1. Global equities trade mixed amid inflation data focus.
2. Indian markets stable with sector rotation ongoing.
3. RBI maintains balanced liquidity outlook.
4. Crude oil prices steady on supply adjustments.
5. Gold prices firm due to geopolitical risk hedging.
6. Manufacturing activity remains expansionary.
7. IT services show rising digital transformation deals.
8. Banking sector asset quality remains strong.
9. Real estate demand improving in metro cities.
10. Renewable energy investments accelerate.
11. Auto retail demand strengthens.
12. Power consumption increases on industrial demand.
13. Metal prices fluctuate on global cues.
14. Pharma exports stable with improving approvals.
15. Startup funding selective, focusing on profitability.
16. Data center investments rising across major cities.
17. Corporate bond market activity picks up.

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18. Rupee remains range-bound.
19. Air travel passenger numbers increase.
20. Logistics demand supported by e-commerce growth.
21. Telecom sector pushes digital monetization.
22. Conglomerates allocate capital to sustainability.
23. Private equity valuations stabilize.
24. Infrastructure tenders expected to rise.
25. Markets sensitive to US Fed rate outlook.

Final View: India remains fundamentally resilient with strong domestic drivers. Focus on disciplined capital allocation and long-term positioning.

— Dr. Aditya Vijay Kashyap

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