



Our News Your Views

The Global Financial Pulse: Daily Newsletter (November 7, 2025)

From the Desk of Dr. Aditya Vijay Kashyap

Today's markets reflect a complex interplay of **geopolitical friction, domestic earnings resilience, and monetary policy speculation**. The weakness in Asian markets, following Wall Street's AI-led decline, underscores global risk-off sentiment, yet key Q2 results from Indian majors and a proactive stance on energy security suggest underlying domestic strength. Investors should focus on **quality-at-a-discount** and structural plays, avoiding the temptation to chase momentum in overvalued segments.

Warm regards,
Dr. Aditya Vijay Kashyap
Financial Strategist & Principal Partner

Today's Top 25 Financial Headlines

Based on news from The Financial Times, The Washington Post, Mint, The Economic Times, and Business Standard.

Global Macro & Geopolitics

- 1. US-China Trade Tensions:** US Supreme Court expresses skepticism on existing tariffs, signaling potential legal battles ahead, even as the Trump administration continues to revoke non-immigrant visas.

Dr. Aditya Vijay Kashyap
Founder & Principal Partner
+91-70116 39525
aditya@scorpioncapital.in
groupceo@tradeconnect.in

Corporate Office:- New Delhi

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2. **US Government Shutdown Impact:** FAA orders a **10% cut in flights** at 40 high-traffic US airports as the government shutdown drags on, creating travel and logistical uncertainty.
 - Dr. Kashyap's Comment: This directly impacts travel, logistics, and supply chain firms. The market is underestimating the **economic multiplier effect** of a prolonged shutdown on consumption and business confidence.
3. **Global Oil Market:** India moves proactively to refill its **strategic oil reserves** in anticipation of rising global crude prices. Oil prices remain mixed, with Brent hovering near \$63 per barrel.
4. **Recession Indicators:** New reports indicate **layoffs are rising to recession-like levels** through October in certain sectors of the US economy.
5. **US Fed vs. Banks:** A persistent divergence is noted between the Federal Reserve's signals of potential tightening and US banks' appearing awash in liquidity, pointing to latent market dislocation risks.

IN India Inc. & Domestic Markets

1. **Q2 Earnings Barrage:** An earnings-packed day with **Tata Elxsi, Bajaj Finance, Nykaa, Trent, Hindalco, and Bajaj Auto** among around 180 companies declaring Q2 results today, guiding sectoral outlook.
2. **Insurance Giant's Performance:** LIC's **Q2 profit rises 31%** to ₹10,098 crore, supported by a growth in premium income, demonstrating stability in the life insurance sector.
3. **Telecom Stake Sale:** Singtel's Pastel is set to lower its **Bharti Airtel holding** with a significant block sale of ₹10,300 crore. Stocks to Watch.

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4. **Promoter Action:** From Tata Motors to Raymond, a growing trend of **top Indian firms taking the demerger route** is noted to unlock shareholder value and achieve operational focus.
5. **Banking Sector Structure:** Finance Minister Nirmala Sitharaman reiterates that India needs a lot of **big, world-class banks**, with talks ongoing with the RBI and lenders.
6. **IPO Activity:** The **Pine Labs IPO** opens for subscription today, while the **Groww IPO** enters its final day. PhysicsWallah sets its ₹3,480 crore IPO price band.
7. **MSCI Index Rejig:** **Paytm and Fortis Healthcare** are among four Indian stocks added to the MSCI flagship index, potentially driving increased FPI inflows.
8. **Sectoral Growth:** **Apollo Hospitals' PAT is up 26%** in Q2, with the company eyeing a breakeven for its HealthCo division within two quarters.
9. **Pharma Results:** **Lupin's Q2 PAT rises 73%** on strong growth across key global markets. Stocks to Watch.
10. **Corporate Legal Action:** The Enforcement Directorate (ED) summons Reliance Group chairman **Anil Ambani** again in a money laundering case.

☒ **Market Movements & Trading**

1. **Weak Global Cues:** Indian equity markets are expected to open on a lower note, with **GIFT Nifty down**, tracking weak Asian markets and overnight declines on Wall Street.
 - Dr. Kashyap's Comment: The opening weakness offers a **buying opportunity** in fundamentally strong stocks that are disproportionately punished by global sentiment.

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2. **AI Stock Correction:** Wall Street's major indices, especially **Nasdaq**, settled in the red overnight due to persistent concerns over high valuations in the Artificial Intelligence (AI) sector.
3. **Commodity View:** **Gold prices** surge to record highs amid global risk aversion, while oil prices remain mixed.
4. **FPI/DII Activity:** Domestic flows continue to stabilize markets, nearing parity with Foreign Portfolio Investors (FIIs) in terms of ownership gap.
5. **Trading Ideas:** Morgan Stanley is reportedly **bullish on Adani Power**, with charts hinting at up to 30% upside potential.

Corporate & Sectoral News

1. **CEO Pay Package:** **Elon Musk** reportedly secures a record-breaking **\$1 trillion Tesla pay package**, the largest ever for a CEO, facing resistance from some shareholders.
2. **Defense Sector:** India is reportedly seeing **no space for China-linked satellites** amid a major security push, benefiting domestic defense and space tech firms.
3. **Automotive:** **Ola Electric's Q2 loss narrows to ₹418 crore**, but sales are down 43%, indicating an uneven path for the EV transition.
4. **Aviation Expansion:** Air India is expected to **resume direct Delhi-Tel Aviv flights** from January 2026.
5. **Technology Strategy:** **Microsoft lays out an ambitious AI vision**, suggesting a strategy that is less dependent on its partnership with OpenAI.

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Would you like me to elaborate on the investment implications of any specific headline, such as the MSCI rejig or the US Government Shutdown's impact?

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