



Our News Your Views

From the desk of Dr. Aditya Vijay Kashyap

Top 25 Financial Headlines – Today

- Big relief expected as India-US trade deal nears completion; markets eye ~34% upside opportunities.
- Industry pushes for deeper bond markets, lower transaction taxes & startup support ahead of Budget 2026.
- Institutional block deals: Major selling in RIL, HDFC Bank & Apollo Hospitals (~₹119 crore).
- Four AMCs receive over ₹15,000 crore inflows from top 30 cities in October.
- Mutual funds fully exit seven mid-cap stocks signalling caution.
- BFSI sector seeks refinance windows & SARFAESI tweaks for Budget 2026-27.
- Top long-term picks for 2025 highlighted across energy & financial sectors.
- Infosys buyback boosts long-term shareholder confidence.
- Five Nifty500 stocks close above VWAP, indicating potential bullish momentum.
- Global funds warn of AI investment 'indigestion'.
- Sensex falls 278 pts; Nifty drops below 25,950 amid mixed global signals.
- Wealth trends: Indian destination wedding contraction reflects consumption sensitivity.
- Experts warn AI overvaluation could trigger global market correction.
- More institutional block deals continue across major blue-chip counters.
- Top city MF inflows continue to remain strong in equity-oriented schemes.
- Investors seek tax rationalisation & capital market incentives pre-budget.
- Mid-cap space sees selective selling pressure by large mutual funds.

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- Buyback action & PSU bank strength highlight sector rotation.
- Technical breakout spotted in various quality mid-cap names.
- Long-term 2025 portfolio accumulation trends rising.
- Global AI investment bubble concerns escalate further.
- India-US trade optimism strengthens market sentiment.
- BFSI expectations from Budget 2026 gain momentum.
- Volatility increases as traders eye global cues.
- Lifestyle & wealth shifts continue to influence India's consumption cycles.

Market View

The day's outlook remains cautiously optimistic. Trade-deal optimism, strong mutual fund flows and select technical breakouts signal near-term opportunities. However, global volatility, AI overvaluation risks, and institutional block trades call for disciplined risk management.

Disclaimer

This document is for informational purposes only and does not constitute investment advice. The views presented are based on publicly available information and market sources. Readers should seek independent financial advice tailored to their personal financial situation.

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