



## Our News Your Views

### From the Desk of Dr. Aditya Vijay Kashyap

Newsletter: Top 25 Financial Headlines — 21 November 2025

Format: Aligned & Justified. Sources: Economic Times, Financial Times, Bloomberg, Reuters, Business Standard, Mint, LiveMint and others.

1. Nifty all-time high within striking distance — Economic Times  
[Source: Economic Times]
2. Sensex settles 446 pts higher; Nifty above 26,150 — Economic Times (market live updates)  
[Source: Economic Times]
3. Top Fed official warns on risk hedge funds pose to \$30tn Treasury market — Financial Times  
[Source: Financial Times]
4. India to stay fastest-growing major economy for decades: Piyush Goyal — Economic Times  
[Source: Economic Times]
5. Reliance stops import of Russian crude into Jamnagar's SEZ refinery — Business Standard  
[Source: Business Standard]
6. UBS CEO calls for compromise over Swiss capital rules — Reuters  
[Source: Reuters]
7. Deutsche Bank CEO pledges key profit target to rise each year — Reuters  
[Source: Reuters]
8. US tech stocks slide as a jolt of volatility hits Wall Street — Financial Times  
[Source: Financial Times]
9. Apple expands India manufacturing as part of supply-chain diversification — Financial Times  
[Source: Financial Times]

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10. Groww IPO/Listing news and market reaction — Economic Times / Mint  
[Source: Economic Times / Mint]
11. Renewable energy sector regulatory updates; GST & transfer-of-benefits scrutiny — Economic Times  
[Source: Economic Times]
12. India, Israel agree on terms for trade engagement; FTA discussions progress — Financial Express  
[Source: Financial Express]
13. Market trading ideas: analyst picks and sectoral calls (Max Financial, Eicher Motors mentioned) — Economic Times  
[Source: Economic Times]
14. Global commodities: Brent crude and base metals show mixed moves — Bloomberg / Reuters  
[Source: Bloomberg / Reuters]
15. Central bank commentary: rate-path and yield curve observations from major economies — Financial Times / Reuters  
[Source: Financial Times / Reuters]
16. IPO pipeline and investor appetite in India: updates and subscription trends — Mint / Economic Times  
[Source: Mint / Economic Times]
17. Corporate results roundup: key quarterly beats and misses across large caps — Business Standard / ET  
[Source: Business Standard / Economic Times]
18. India's mobile exports and Make-in-India manufacturing growth updates — Financial Times / ET  
[Source: Financial Times / Economic Times]
19. Banking sector capital and credit-deposit ratio movements — Business Standard / Reuters  
[Source: Business Standard / Reuters]
20. Geopolitics & trade: US tariffs, trade flows and global supply-chain shifts — Financial Times / Reuters  
[Source: Financial Times / Reuters]
21. Private equity & alternative assets: notable deals and IPO-readiness commentary — Financial Times

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Bloomberg

[Source: Financial Times / Bloomberg]

22. Inflation and fuel price movement: domestic and global drivers — Economic Times / LiveMint

[Source: Economic Times / LiveMint]

23. Crypto & digital assets: regulatory updates and market reaction — Reuters / Bloomberg

[Source: Reuters / Bloomberg]

24. M&A watch: strategic transactions announced in the region — Business Standard / ET

[Source: Business Standard / Economic Times]

25. Policy watch: upcoming government announcements and trade/industry briefings — Economic Times / LiveMint

[Source: Economic Times / LiveMint]

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

Markets remain sensitive to macro signals — particularly central bank commentary from the US and Europe, and domestic growth and policy signals from India. Equity indices in India are approaching record levels, reflecting a combination of strong corporate earnings expectations, selective foreign inflows, and sectoral momentum.

Bond markets are watching liquidity and fiscal cues closely; any signs of sustained long-end yield pressure would require recalibration by fixed income allocators.

Commodities and energy remain volatile on the back of geopolitical developments and demand-supply rebalancing; investors should treat energy exposure with tactical sizing.

For stock-picking, prefer high-conviction themes: domestic consumption recovery, manufacturing (Make in India beneficiaries), and export-oriented technology and capital goods names. Manage risk with appropriate stop-losses and portfolio diversification.

Short-term tactical view: maintain a balanced allocation with a bias towards equities for investors with a multi-month horizon, but keep cash reserves to take advantage of volatility-driven opportunities.

Disclaimer: This newsletter aggregates headlines from public news sources for informational purposes. Views expressed in the 'Final Views' section are those of Dr. Aditya Vijay Kashyap and do not constitute investment advice. Readers should consult their financial advisor before making investment decisions.

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