



## Our News Your Views

### Today's Newsletter — Top 25 Financial Headlines

From the desk of Dr Aditya Vijay Kashyap

Date: 25 November 2025

Top 25 headlines from major global financial newspapers:

1. RBI warns of “heightened exuberance” in global markets amid uncertainty.
2. RBI says Indian economy entering a virtuous cycle despite global headwinds.
3. Benchmark bond yields retreat after RBI hints at potential rate cuts.
4. India’s low inflation sparks debate ahead of next RBI policy meeting.
5. Apple cuts jobs across sales operations.
6. Global markets rally as U.S. stocks jump on renewed rate-cut hopes.
7. S&P forecasts India GDP growth at 6.5% for FY26.
8. Global asset management industry projected to hit \$200T by 2030.
9. Commodity markets steady as global demand stabilizes.
10. Emerging markets see positive flows as easing signals emerge.
11. Corporate bond spreads tighten as investors hunt for yield.
12. M&A activity rises globally across financial services.
13. Tech stocks rebound on strong AI optimism.
14. Big Tech debt issuance rises to fund AI investments.
15. Global trade tensions fuel investor caution.
16. INR volatility persists; RBI intervention remains active.
17. UK fiscal metrics surprise markets; borrowing concerns remain.

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18. Europe intensifies discussions on steel import protections.
19. Bank earnings show resilience despite margin pressures.
20. Crypto markets volatile amid rate expectations.
21. Private market revenues grow despite profitability concerns.
22. Domestic consumption drives India's economic momentum.
23. India's exports and services sector see sustained strength.
24. AI-led market re-rating continues globally.
25. Global markets cautious ahead of major policy decisions.

Final views — From the desk of Dr Aditya Vijay Kashyap

Domestic macro conditions continue to strengthen with low inflation and improving consumption. RBI's tone indicates that policy easing may emerge sooner than expected, which supports sectors such as financials, IT exports, and high-quality cyclicals. Global markets remain driven by AI-led optimism, but elevated valuations require discipline. Indian investors should maintain selective exposure in export-oriented equities, strong-capital financials, and quality mid-caps.

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

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