



Our News Your Views

Today's Financial Newsletter

December 5, 2025

Prepared by: Scorpion Capital — Research Desk
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Top 25 Financial News Headlines

1. Rupee recovers marginally to 89.96 after hitting record low of 90.43; RBI intervenes.
2. Weak rupee improves margins for IT services companies.
3. IndiGo under scrutiny after mass flight cancellations; CEO apologises.
4. Nvidia CEO warns China may dominate global AI leadership.
5. GST collections flat at ₹1.70 lakh crore; taxable activity grows 15%.
6. BAT to sell up to 15.3% in ITC Hotels through block deal.
7. S&P upgrades Reliance Industries to A-.
8. Bank deposit growth slows to 9.9% in Q2 FY26.
9. Current account deficit narrows to \$12.3 billion.
10. PSU banks lead retail credit growth.
11. SEBI warns on unregistered bond trading platforms.
12. US tightens H-1B norms impacting IT firms.
13. Bitcoin surges to \$92,000; crypto market cap hits \$3.13 trillion.

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14. Pharma stocks benefit from rupee fall.
15. Consumer durable prices to rise.
16. ASG Eye Hospital to invest ₹2,000 crore in expansion.
17. Indian refiners secure additional US LPG cargoes.
18. Mid-cap stocks offer 25% upside potential.
19. Bharat NCAP 2.0 norms tighten safety benchmarks.
20. Udaan raises \$340 million pre-IPO.
21. WGC forecasts 30% upside in gold by 2026.
22. Suzlon to launch AI-enabled blade factories.
23. Programmable CBDC goes live.
24. Indian startups create 12+ lakh jobs.
25. US trade delegation to visit India.

Final Views – From the Desk of Dr. Aditya Vijay Kashyap

The current market environment remains defined by currency pressure, operational disruptions, and selective sector gains.

The Rupee's fall is driven largely by global dollar strength rather than domestic weakness. While exports benefit, import-dependent sectors now face margin compression.

India's domestic consumption remains resilient with strong retail credit growth. However, deposit growth slowdown may tighten liquidity.

Investors should adopt a disciplined strategy focused on businesses with strong cash flow, low leverage and pricing power.

In uncertain markets, discipline is alpha.

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