



Our News Your Views

Daily Financial Newsletter — India Focus

Date: 2 January 2026

Top 25 Financial & Economic Headlines (India Focused)

1. India's GDP growth for FY26 projected at 6.5–6.8%, driven by domestic demand and public capex.
2. Union Budget 2026 expected to prioritise infrastructure, MSMEs and employment generation.
3. RBI maintains cautious stance on interest rates amid inflation and global volatility.
4. India's forex reserves remain above USD 620 billion, strengthening external stability.
5. Manufacturing PMI remains in expansion zone indicating industrial recovery.
6. PLI schemes boost electronics, semiconductors and manufacturing investments.
7. UPI and digital payments hit record transaction volumes.
8. Bank credit growth stays strong at around 15% YoY.
9. Public sector banks report multi-year low NPAs and improved profitability.
10. NBFC sector shows recovery supported by liquidity and risk recalibration.
11. Infrastructure spending accelerates across roads, railways and renewables.
12. India attracts sustained FDI inflows in defence, manufacturing and green energy.
13. Corporate earnings outlook remains resilient despite margin pressures.
14. Indian rupee trades in a stable range supported by strong fundamentals.
15. Employment indicators improve in services and construction sectors.
16. Indian equity markets open 2026 with cautious optimism.
17. PSU banks continue gaining investor confidence.

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18. Green energy companies raise record financing.
19. Startup funding revives selectively with focus on profitability.
20. Real estate demand remains robust across residential and office segments.
21. Corporate bond issuances rise reflecting credit market confidence.
22. Weak US dollar improves emerging market capital flows.
23. AI adoption creates long-term opportunities for Indian IT and services.
24. Crude oil volatility remains a key risk for India's trade balance.
25. India positioned as a preferred investment destination amid global uncertainty.

Final Views from the Desk of Dr. Aditya Vijay Kashyap

India enters 2026 with strong macroeconomic fundamentals, a resilient banking system, and sustained reform momentum. Domestic demand, infrastructure creation, and digital transformation continue to anchor growth. While global risks persist, India's policy continuity, demographic dividend, and improving asset quality across banks position the economy as a long-term growth leader.

For investors and institutions, India offers relative stability, scalable opportunities, and sustainable returns across financial services, infrastructure, manufacturing, renewables and technology-led sectors.

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