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Our News Your Views

India Financial Newsletter – Republic Day Edition

Date: January 26, 2026

Theme: Economic Sovereignty, Growth, and Global Leadership

Overview

On the occasion of India's 77th Republic Day, this special edition newsletter captures the most relevant financial, economic, and corporate developments shaping India's growth trajectory. The focus remains on India-aligned policy direction, market resilience, and strategic opportunities.

Top 25 Financial & Economic Headlines (India-Focused)

1. Indian equity markets remain closed on Republic Day; investors await Budget 2026 cues.
2. IMF upgrades India's FY26 GDP growth forecast to 7.3%, citing strong domestic demand.
3. Government accelerates capital expenditure roadmap ahead of Union Budget 2026.
4. RBI likely to continue liquidity support to maintain credit growth momentum.
5. Foreign investors re-evaluate India allocations amid global volatility.
6. Reliance Industries prepares groundwork for potential Jio IPO in 2026.
7. Public sector banks report steady asset quality improvement.
8. MSME credit demand rises with manufacturing and infra push.
9. Infrastructure spending expected to cross ₹11 trillion in FY27.
10. India-EU trade negotiations advance with tariff rationalisation talks.
11. Auto sector eyes duty reforms to boost EV adoption.
12. Renewable energy investments hit new highs in solar and green hydrogen.
13. Fintech sector sees consolidation amid regulatory clarity.

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14. Corporate bond issuances rise as companies lock long-term funding.
15. Rupee trades in a stable range supported by forex reserves.
16. Gold demand remains firm as hedge against global uncertainty.
17. Real estate sector shows sustained recovery in top metros.
18. Startup funding stabilises with focus on profitability.
19. Defence manufacturing gains traction under Make in India.
20. Logistics and ports sector benefit from Gati Shakti initiatives.
21. Healthcare and pharma exports grow on global demand.
22. IT services outlook improves with selective global deal wins.
23. Agricultural reforms continue to support rural consumption.
24. Energy security remains central to India's strategic planning.
25. India strengthens its position as the fastest-growing major economy.

Sectoral Snapshot

Markets: Cautious optimism ahead of Budget 2026.
Banking & Finance: Stable balance sheets and improved credit growth.
Infrastructure: Strong government-led momentum.
Energy & Renewables: Structural growth supported by policy push.
Technology & Digital Economy: Focus on efficiency and scalable growth.

From the Desk of Dr. Aditya Vijay Kashyap

Republic Day is a reminder that India's economic strength is rooted in strong institutions, policy stability, and entrepreneurial spirit. As we approach Union Budget 2026, the focus must remain on sustainable growth, capital formation, and global competitiveness.

India stands at a pivotal juncture where disciplined fiscal management, continued infrastructure investment, and financial sector resilience can unlock the next phase of economic leadership. Long-term investors should align with themes of manufacturing, infrastructure, energy transition, and financial inclusion while remaining mindful of global risks.

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