



Our News Your Views

India Financial & Economic Newsletter – Feb 2, 2026

Top 25 India-Focused Financial Headlines with Editorial Insights

1. Union Budget 2026-27 raises infrastructure capex to ₹12.2 trillion, signaling growth commitment.
2. Manufacturing thrust on semiconductors, biopharma and rare earths under Make in India.
3. Fiscal deficit targeted below 4.4%, balancing growth with discipline.
4. High-level committee proposed to reform and future-proof the banking sector.
5. Government backs Orange Economy: AVGC, media and content creation.
6. AI-driven industrial push with state-led skill missions.
7. Global uncertainties may cloud short-term growth outlook.
8. Markets remain cautious despite strong GDP growth signals.
9. OPEC projects India to sustain robust growth through 2026.
10. Indian businesses gain greater access to Middle East capital markets.
11. Equity markets volatile post-budget due to tax and STT changes.
12. Infrastructure and PSU stocks show resilience.
13. Mid and smallcaps expected to recover with earnings improvement.
14. Commodity markets react sharply to fiscal and global cues.
15. RBI policy stance keeps inflation expectations anchored.
16. Income tax regime clarified with stability in slabs.
17. TDS norms tightened for digital and online gaming segments.
18. NRI investment limits enhanced to attract foreign capital.
19. Customs duty rationalization to improve supply chains.
20. Simplified compliance to improve ease of doing business.
21. Seafood and agri exports receive duty-free import benefits.
22. Rare earth mining corridors planned in strategic states.

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23. Data centers, healthcare and electronics prioritized.
24. MSME Growth Fund of ₹10,000 crore announced.
25. Corporate bond market reforms proposed to deepen capital markets.

Editorial View:

From the Desk of Dr. Aditya Vijay Kashyap

India today stands at a critical inflection point. The Union Budget 2026-27 clearly signals a decisive shift towards infrastructure-led, technology-driven and inclusive economic growth. While markets may witness short-term volatility, the long-term structural fundamentals remain strong.

The focus on manufacturing, digital economy, MSMEs and fiscal prudence positions India as a resilient and attractive destination for global capital. Strategic patience, policy stability and disciplined execution will be key as India advances towards becoming a \$5 trillion economy.



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