



Our News Your Views

India Daily Financial Newsletter

Date: 4 February 2026

1. Markets rally on India–US trade agreement boosting exports and sentiment.
2. Rupee records strongest single-day gain in seven years.
3. Union Budget 2026–27 emphasizes infrastructure and fiscal prudence.
4. Government announces record borrowing to fuel growth.
5. Banking sector review committee proposed under Viksit Bharat.
6. Mixed reactions emerge on manufacturing and employment outlook.
7. Capital expenditure raised to ₹12.2 lakh crore.
8. Infrastructure, logistics, and MSMEs receive focused support.
9. Fiscal deficit targeted at sustainable levels.
10. Foreign institutional investors return strongly.
11. RBI expected to pause rate hikes, focus on liquidity.
12. Gold prices rise amid global uncertainty.
13. IT sector faces pressure from global tech sell-off.
14. Export-oriented sectors gain traction.
15. Fintech and AI innovation expand in India.
16. Smartphone premiumization continues.
17. Tax reforms spark industry debate.
18. Energy imports and oil sourcing remain under watch.
19. Telecom and auto exports show promise.

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20. Wealth creation trends strengthen.
21. Corporate ownership patterns evolve.
22. Geopolitical risks monitored closely.
23. Liquidity remains key policy theme.
24. Global growth outlook supportive for India.
25. Long-term reforms remain crucial.

From the Desk of Dr. Aditya Vijay Kashyap

India stands at a critical inflection point where policy reforms, global partnerships, and fiscal discipline converge. The Union Budget and the India–US trade agreement reinforce confidence in India’s long-term growth story. Execution, governance, and inclusive growth will be decisive factors in sustaining momentum.



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