



## Our News Your Views

### INDIA FINANCIAL MARKETS & ECONOMY DAILY — NEWSLETTER

Date: 7 February 2026

Compiled from leading Indian & global financial newspapers

#### TOP 25 INDIA-ALIGNED FINANCIAL & ECONOMIC HEADLINES

1. India-US interim trade framework announced, aimed at tariff reduction and strategic cooperation.
2. US removes punitive tariff on India linked to Russian oil imports.
3. RBI keeps repo rate unchanged at 5.25% amid easing inflation.
4. RBI maintains neutral stance; inflation projected near 2.1%.
5. Global insurers explore entry into India's \$130 bn insurance market.
6. Farm leaders express concern over implications of India-US trade deal.
7. Indian rupee logs strongest single-day gain in over seven years.
8. Union Budget 2026-27 prioritises manufacturing, AI, and semiconductors.
9. Capital expenditure set at record ₹12.2 trillion for infrastructure push.
10. Moody's terms budget as tactical, not transformational.
11. RBI proposes compensation norms for small-value cyber fraud victims.
12. NBFC regulatory easing announced for smaller balance-sheet entities.
13. NSE advances IPO preparedness with new board committee.
14. Nifty50 shows resilience with strong technical support zones.
15. Indian startups generate over 1.14 lakh jobs.
16. AI and ecommerce startups attract fresh funding rounds.

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17. Debt-to-GDP anchor strengthens India's fiscal credibility.
18. SBI launches CHAKRA platform for green and advanced sector financing.
19. Major banks report mixed Q3 earnings performance.
20. SEBI plans overhaul of mutual fund expense and lock-in rules.
21. Digital payment fraud remains a key regulatory focus.
22. India's first AI unicorn prepares for IPO.
23. Commodity markets show volatility in gold and silver prices.
24. Conglomerate stocks witness selective institutional flows.
25. New emission norms likely to raise auto sector cost structures.

#### **FINAL VIEWS — DESK OF DR ADITYA VIJAY KASHYAP**

India continues to demonstrate structural economic strength driven by disciplined fiscal management, stable monetary policy, and expanding global engagement. The interim trade framework with the United States is a strategic inflection point, but domestic safeguards for agriculture and MSMEs must be reinforced.

Financial markets are reflecting confidence, though global volatility necessitates prudence. Sustained growth will depend on innovation-led expansion, regulatory clarity, and balanced capital deployment. India's long-term trajectory remains positive, provided reforms continue with consistency and inclusion.

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