

Our News Your Views

Daily India Newsletter – Top Developments

Date: Today

This newsletter presents a comprehensive view of India-aligned developments across the economy, markets, policy, geopolitics, and global trends impacting India. The headlines are curated from renowned financial and national newspapers including The Economic Times, Business Standard, Reuters, Bloomberg, Financial Times, LiveMint, Moneycontrol, and leading national dailies.

Top 25 India-Aligned News Headlines

1. RBI keeps repo rate unchanged, maintains growth focus amid global uncertainty
2. Indian economy projected to grow above 7% in FY26, among fastest globally
3. Equity markets steady as investors digest RBI policy and global cues
4. Rupee strengthens on sustained foreign portfolio inflows
5. Government accelerates infrastructure spending ahead of new fiscal cycle
6. India-US trade negotiations progress with protection for key farm sectors
7. Banking sector credit growth remains robust, led by retail and MSMEs
8. Real estate demand improves on stable interest rate outlook
9. PSU banks report improvement in asset quality and lower NPAs
10. Corporate earnings show mixed trends amid margin pressures
11. India's manufacturing PMI signals expansion, exports show resilience
12. Oil prices volatile; India benefits from stable import bill outlook
13. Gold prices soften; RBI remains comfortable on gold loan exposure
14. Government explores higher FDI limits in select strategic sectors

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15. Digital payments and fintech transactions hit new highs
16. Capital markets regulator strengthens norms for investor protection
17. Startup funding selective, focus shifts to profitability and governance
18. Auto sector demand steady; EV adoption continues gradual rise
19. Pharmaceutical exports supported by strong global demand
20. IT sector cautious as global tech spending remains uneven
21. India deepens engagement with Gulf and ASEAN nations on trade
22. Global central banks signal data-dependent approach to rate cuts
23. Geopolitical risks persist, but India's macro stability remains intact
24. Climate and energy transition investments gain policy momentum
25. India's long-term growth story continues to attract global investors

Markets & Economy – Contextual Analysis

India's macroeconomic fundamentals remain resilient, supported by stable monetary policy, improving fiscal discipline, and sustained domestic demand. While global headwinds persist, India continues to stand out as a relative growth outperformer.

Policy, Trade & Global Alignment

Policy continuity, infrastructure push, and calibrated trade negotiations remain central to India's economic strategy. The government's emphasis on protecting domestic interests while expanding global engagement reflects a balanced approach.

Final Views – From the Desk of Dr. Aditya Vijay Kashyap

India today stands at a critical inflection point. With macro stability, disciplined monetary policy, and strong domestic demand, the country is well-positioned to navigate global volatility. While short-term market movements may remain range-bound, India's long-term structural story—driven by demographics, digitization, infrastructure, and reforms—continues to offer compelling opportunities for investors, institutions, and global partners alike.

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