



Our News Your Views

INDIA FINANCIAL & ECONOMIC NEWSLETTER

Date: 04 March 2026

Prepared for: Strategic & Institutional Readers

Top 25 Financial & Economic Headlines (India Focused)

1. India's GDP growth around 7.6% signals continued economic resilience and manufacturing-led expansion.
2. Union Budget 2026-27 sets record government expenditure of ₹53.47 lakh crore with strong infra push.
3. Capital expenditure allocation of ₹12.2 lakh crore expected to accelerate infrastructure development.
4. RBI maintains steady policy stance as inflation remains within tolerance band.
5. India continues to attract global capital amid strong domestic demand outlook.
6. Foreign investors increasing exposure to Indian banking and PSU financial stocks.
7. Indian equity markets expected to remain volatile due to global geopolitical tensions.
8. Oil price fluctuations due to Middle East tensions raise concerns for import-dependent economies.
9. Government focuses on digital infrastructure and fintech expansion.
10. India AI Impact Summit 2026 positions India as technology leader among Global South nations.
11. Private banks and fintech firms continue to expand digital credit ecosystems.
12. Manufacturing sector growth strengthens India's employment outlook.
13. Global investors reassess allocations with India emerging as long-term growth destination.

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14. India's services exports continue to support economic resilience.
15. Corporate India witnessing increased capital raising through QIPs and market issuances.
16. Indian startups shifting focus from hyper-growth to profitability.
17. Infrastructure investment trusts (InvITs) and REITs gaining institutional interest.
18. Renewable energy investments accelerating across solar and green hydrogen sectors.
19. India strengthening trade corridors with Indo-Pacific and Middle East partners.
20. Government policies encouraging semiconductor and electronics manufacturing.
21. Indian rupee stability supported by forex reserves and policy interventions.
22. Domestic consumption continues to drive growth across FMCG and retail sectors.
23. Credit growth in banking sector remains robust with improving balance sheets.
24. Insurance sector reforms expected to attract higher foreign participation.
25. India's long-term goal of becoming a \$5 trillion economy remains central to policy strategy.

Macro & Market Insights

India continues to demonstrate strong macroeconomic resilience supported by domestic consumption, infrastructure investment, and financial sector stability. Global investors are increasingly positioning India as a structural growth market amid global uncertainties.

Views from the Desk of Dr Aditya Vijay Kashyap

India stands at a critical inflection point where structural reforms, digital transformation and infrastructure expansion are converging to create a multi-decade growth opportunity. The combination of fiscal discipline, rising domestic demand and strong capital markets will continue to attract global investors.

However, geopolitical risks, commodity price volatility and global monetary tightening require strategic caution. Investors and institutions should focus on long-term sectors such as infrastructure, financial services, technology, manufacturing and renewable energy.

In my view, India's economic trajectory over the next decade will increasingly be defined by capital formation, innovation and global integration of its financial markets.

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