



Our News Your Views

India Financial & Policy Newsletter

13 March 2026

This newsletter compiles key economic, financial, corporate, and policy developments relevant to India. It synthesizes themes commonly covered by leading financial publications such as The Economic Times, Business Standard, Financial Express, Mint, and The Hindu BusinessLine. The focus is on macroeconomics, markets, policy direction, infrastructure, technology, and global developments affecting India.

1. India's GDP Growth Outlook Strengthens as Domestic Demand Remains Resilient
2. RBI Signals Continued Vigilance on Inflation While Supporting Growth Momentum
3. India's Fiscal Consolidation Path Gains Credibility Ahead of FY Budget Cycle
4. Manufacturing PMI Signals Expansion as Export Orders Recover
5. Government Pushes Infrastructure Capex to Sustain Economic Growth
6. India's Renewable Energy Capacity Expansion Accelerates Toward Net-Zero Goals
7. Banking Sector Asset Quality Improves with Record Low NPAs
8. India's Startup Ecosystem Shows Signs of Funding Recovery
9. Digital Public Infrastructure Continues to Transform Financial Inclusion
10. Global Supply Chain Realignment Positions India as Manufacturing Hub
11. Semiconductor Mission Gains Momentum with New Investment Proposals
12. Indian Equity Markets Remain Resilient Amid Global Volatility
13. Foreign Institutional Investors Rebalance Portfolios Toward Indian Equities
14. Rupee Stability Supported by Strong Forex Reserves
15. Logistics and Multimodal Transport Policy Boosts Trade Efficiency

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16. India–Middle East–Europe Economic Corridor Discussions Progress
17. IT Services Sector Adjusts to Slower Global Technology Spending
18. Electric Vehicle Adoption Accelerates with Policy Incentives
19. Agriculture Reforms and Digital Platforms Improve Market Access
20. Defence Manufacturing Push Strengthens Domestic Industrial Base
21. Tourism and Aviation Recovery Drives Service Sector Growth
22. Urbanization and Smart City Projects Attract Infrastructure Investment
23. Corporate India Reports Stable Earnings with Sectoral Divergence
24. Global Oil Price Movements Remain Key Risk for India’s Current Account
25. Geopolitical Shifts Continue to Shape Trade and Strategic Partnerships

From the Desk of Dr Aditya Vijay Kashyap

The Indian economy stands at a pivotal moment where macroeconomic stability, demographic strength, and digital transformation converge to create a unique growth trajectory. Policymakers appear focused on balancing fiscal discipline with strategic investments in infrastructure, manufacturing capability, and technological advancement.

The coming years will likely be defined by three structural themes: first, India's emergence as a critical node in global supply chains; second, the deepening of digital public infrastructure that continues to reshape financial inclusion and governance; and third, the sustained push toward energy transition and manufacturing competitiveness.

While global uncertainties—ranging from geopolitical tensions to commodity price volatility—remain persistent risks, India's strong domestic demand, improving banking sector balance sheets, and policy continuity provide a solid foundation for medium-term expansion.

For investors, businesses, and policymakers alike, the central question is not whether India will grow, but how effectively the nation can convert structural advantages into durable prosperity. The policy choices made today will shape India’s economic architecture for decades to come.

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