



Our News Your Views

India Financial & Economic Newsletter

Date: 29 March 2026

Top 25 India-Aligned Financial Headlines

1. RBI maintains policy stance amid inflation moderation signals
2. India GDP growth outlook remains robust despite global slowdown concerns
3. FIIs return to Indian equities with renewed confidence
4. Government pushes infrastructure spending ahead of fiscal year-end
5. Banking sector NPAs continue downward trajectory
6. Startup funding shows early signs of revival in Q1
7. SEBI tightens disclosure norms for listed entities
8. Rupee stabilizes against USD amid global volatility
9. Oil price fluctuations pose risks to fiscal balance
10. PLI schemes boost domestic manufacturing momentum
11. Renewable energy investments surge across states
12. Real estate sector witnesses steady demand in metro cities
13. Auto sector records strong monthly sales growth
14. Digital payments ecosystem expands with UPI dominance
15. PSU banks outperform private peers in recent quarters
16. Export sector faces headwinds due to weak global demand

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17. Defense sector sees increased budgetary allocation
18. Telecom sector consolidation improves profitability outlook
19. Pharma exports remain resilient in global markets
20. IT sector cautious amid slowdown in global tech spending
21. Retail inflation trends towards RBI comfort band
22. Fiscal deficit remains within targeted range
23. Private capex cycle shows early recovery signals
24. Gold demand rises as hedge against volatility
25. Green hydrogen mission gains strategic traction

Executive Summary

India continues to demonstrate macroeconomic resilience supported by strong domestic demand, policy stability, and structural reforms. While global uncertainties persist, India's growth trajectory remains comparatively strong, driven by infrastructure push, manufacturing incentives, and financial sector stability.

Final Views from the Desk of Dr Aditya Vijay Kashyap

India stands at a strategic inflection point where disciplined policy execution, capital inflows, and structural reforms are aligning to create long-term sustainable growth. While external risks remain, the domestic economy is well-positioned to capitalize on global supply chain shifts. Investors should focus on sectors aligned with government priorities such as infrastructure, renewables, manufacturing, and financial services.

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