



Our News Your Views

INDIA FINANCIAL NEWSLETTER Scorpion Capital

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Top 25 Financial Headlines

- RBI tightens FX rules impacting banking profitability
- Rupee rebounds after RBI intervention
- Rupee volatility persists amid global uncertainty
- CASA ratio declines across Indian banks
- RBI expected to maintain repo rate
- Inflation target retained at 4%
- Bank stocks decline due to FX curbs
- Banking sector may face ₹5000 crore impact
- Capital outflows pressure markets
- Sensex declines amid global tensions
- Oil price surge impacts India
- Import bill rises due to energy dependency
- Currency risks increase
- Emerging market volatility rises
- Infrastructure capex increased in Budget 2026
- Semiconductor mission expanded
- SME Growth Fund announced

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Financial reforms effective April 2026

Airfares rise due to fuel cost

Domestic travel demand increases

Logistics costs rise

Banks operational updates

RBI improves application processing

₹2000 note withdrawal nearly complete

Shift toward digital banking continues

Executive Summary

India's economic outlook remains resilient yet complex with strong domestic growth, supported by infrastructure and manufacturing momentum, while facing global risks including currency volatility, oil prices, and capital outflows.

Final Views from the Desk of Dr Aditya Vijay Kashyap

India remains a strong long-term investment destination despite short-term volatility. Strategic focus should remain on infrastructure, manufacturing, healthcare, and financial services.

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