



Our News Your Views

Global Financial & Economic Newsletter (India Focus)

Date: 29 April 2026

INDIA - TOP FINANCIAL & ECONOMIC DEVELOPMENTS

- 1. India GDP Growth Outlook Remains Strong**
 India continues to demonstrate resilience with GDP growth projected above 6.5%, driven by domestic consumption, infrastructure spending, and a robust services sector.
- 2. RBI Maintains Balanced Monetary Policy**
 The Reserve Bank of India remains cautious on inflation while supporting growth, signaling stable interest rates amid global uncertainty.
- 3. Record GST Collections Boost Fiscal Strength**
 GST revenues remain consistently above expectations, improving government fiscal headroom and supporting infrastructure investments.
- 4. Capex Cycle Accelerates Across Sectors**
 Public and private capital expenditure is rising sharply, especially in railways, defense, renewable energy, and logistics.
- 5. India's Manufacturing Gains Momentum**
 PLI schemes and supply chain diversification are driving growth in electronics, auto components, and semiconductors.
- 6. Banking Sector Shows Strong Asset Quality**
 NPAs are at multi-year lows, credit growth remains strong, and profitability of Indian banks continues to improve.
- 7. Stock Markets Trade Near Record Highs**
 Benchmark indices remain resilient, supported by strong domestic inflows and earnings growth.

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- 8. Startup Funding Sees Gradual Recovery**
After a slowdown, venture capital activity is stabilizing, particularly in fintech, EV, and AI-driven startups.
- 9. Energy Transition Investments Surge**
India continues to attract global capital into solar, green hydrogen, and EV infrastructure.
- 10. Udaan Scheme Expands Regional Connectivity**
Regional aviation growth continues to expand air connectivity to Tier 2 and Tier 3 cities.
- 11. Digital Economy Continues Rapid Expansion**
UPI, fintech innovation, and digital services are driving India's transformation into a digital-first economy.
- 12. Infrastructure Pipeline Gains Speed**
National Infrastructure Pipeline projects are accelerating, enhancing logistics efficiency and economic productivity.

GLOBAL – KEY FINANCIAL DEVELOPMENTS

- 13. Global Growth Remains Uneven**
Major economies show mixed growth patterns, with emerging markets outperforming developed economies.
- 14. US Federal Reserve Signals Policy Caution**
The Fed maintains a data-dependent stance amid persistent inflation concerns and economic moderation.
- 15. China's Economic Recovery Faces Challenges**
Weak consumption and property sector stress continue to weigh on China's recovery trajectory.
- 16. Oil Prices Remain Volatile**
Geopolitical tensions and supply adjustments continue to impact global crude oil prices.
- 17. Global Supply Chains Stabilizing**
Post-pandemic supply chain disruptions have eased, though geopolitical risks remain.
- 18. AI Investment Boom Reshapes Markets**
Artificial intelligence continues to attract massive investments, transforming technology and enterprise sectors.
- 19. Global Debt Levels Remain Elevated**
High sovereign and corporate debt continues to be a structural risk for global financial stability.

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- 20. Climate Finance Gains Momentum**
 Sustainable investing and ESG-linked financing continue to grow globally.
- 21. Currency Volatility Impacts Trade**
 Fluctuations in major currencies are influencing global trade dynamics and capital flows.
- 22. Gold Prices Hold Strong as Safe Haven**
 Investors continue to favor gold amid economic uncertainty and inflation risks.
- 23. Private Equity Activity Rebounds**
 Deal-making is gradually recovering with renewed investor confidence in select sectors.
- 24. Global Aviation Sector Recovery Continues**
 Passenger demand continues to rise, supported by tourism and business travel recovery.
- 25. Geopolitical Risks Continue to Influence Markets**
 Ongoing geopolitical tensions remain a key driver of market volatility worldwide.

FINAL VIEWS FROM THE DESK OF DR. ADITYA VIJAY KASHYAP

India stands at a pivotal juncture where macroeconomic stability, policy consistency, and structural reforms are converging to create a multi-decade growth opportunity. While global uncertainties persist, India’s domestic demand-driven model, supported by digital transformation and infrastructure expansion, positions it as a leading investment destination. Strategic sectors such as aviation, renewable energy, financial services, and technology will continue to attract both domestic and global capital. Investors should remain focused on long-term fundamentals while navigating short-term volatility with disciplined capital allocation strategies.

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