



## Our News Your Views

### Global Financial Newsletter – India Focus | 05 May 2026

Prepared for strategic insights across India and global markets.

#### 1. India GDP Growth Outlook Strengthens

India's GDP projections remain robust driven by domestic demand, capex push, and services exports.

#### 2. RBI Policy Stance Holds Neutral

Inflation trajectory stabilizing; liquidity calibrated with growth support.

#### 3. Indian Equity Markets Near Record Highs

Benchmark indices driven by banking, IT and infra sectors.

#### 4. FDI Inflows Show Resilience

Continued investor confidence in manufacturing and digital sectors.

#### 5. India's Semiconductor Push Gains Momentum

Policy incentives attracting global chipmakers.

#### 6. Banking Sector Credit Growth Expands

Retail and MSME lending driving growth.

#### 7. Infrastructure Spending Accelerates

Roads, railways, and logistics investments increase.

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## 8. Rupee Stability Amid Global Volatility

Forex reserves provide cushion.

## 9. Oil Prices Impact Trade Balance

Moderation supports macro stability.

## 10. Digital Payments Surge Continues

UPI transactions hit new highs.

## 11. China Growth Slows

Structural issues impacting global demand.

## 12. US Fed Signals Rate Pause

Inflation cooling influences policy.

## 13. European Economy Faces Slow Recovery

Energy transition costs weigh on growth.

## 14. Global Tech Sector Rebounds

AI investments drive valuations.

## 15. Gold Prices Stay Elevated

Safe-haven demand persists.

## 16. Crypto Market Volatility Continues

Regulatory clarity awaited.

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### **17. Global Supply Chains Stabilizing**

Post-pandemic normalization continues.

### **18. Emerging Markets Attract Capital**

India remains top destination.

### **19. ESG Investments Gain Traction**

Sustainability-linked funding increases.

### **20. Aviation Sector Recovery Strong**

Passenger traffic exceeds pre-pandemic levels.

### **21. Real Estate Markets Expand**

Commercial and residential demand rises.

### **22. Startup Funding Gradually Recovers**

Selective investments in AI and fintech.

### **23. Energy Transition Investments Rise**

Renewables attract global capital.

### **24. Geopolitical Risks Persist**

Conflicts continue to influence markets.

### **25. Global Trade Outlook Improves**

Trade flows stabilizing with cautious optimism.

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## Final Views – Dr Aditya Vijay Kashyap

India stands at the center of global economic realignment with strong macro fundamentals, policy stability, and demographic advantage. While global uncertainties persist, India offers one of the most compelling growth stories. Strategic investments in infrastructure, digital economy, and sustainability will define long-term value creation.



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