SCORPION CAPITAL

Delivering Value. Building Legacies.

BEST INVESTMENT BANKING FIRM - 2025 | BILLIONAIRES PEACE AWARD - 2026 WINNER

MORNING INTELLIGENCE BRIEF

18 JUNE 2026 | THURSDAY

Your daily snapshot of markets, economy, opportunities and key developments

GLOBAL MARKET SNAPSHOT (EARLY MORNING)

NIFTY 50	SENSEX	USD/INR	GOLD (Spot)	CRUDE OIL (WTI)	INDIA 10Y YIELD	US 10Y YIELD
24,812.90	81,349.79	94.77	$2,314.80	$75.47	6.865%	4.456%
+124.35 (+0.50%)	+402.37 (+0.50%)	+0.24 (+0.26%)	-18.40 (-0.79%)	-1.32 (-1.72%)	-0.001 (-0.01%)	-0.001 (-0.02%)

MARKET SENTIMENT

Global markets trade with caution as investors await clarity on central bank policies.

Oil prices ease, while gold remains under pressure amid profit booking.

India's macro outlook remains stable with strong domestic demand and policy support.

SECTOR WATCH (INDIA)

Sector	Outlook
BANKING	Positive – Credit growth and NIMs resilient
INFRASTRUCTURE	Strong order book & government push
IT & TECHNOLOGY	AI investments driving long-term growth
PHARMA	Global demand steady, exports supportive
AUTO	Input cost pressure, EV demand mixed
REAL ESTATE	Premium housing demand remains strong
HOSPITALITY	Occupancy and ARR continue to improve
RENEWABLE ENERGY	Strong pipeline, global capital interest

COMMODITY TRACKER

Gold (Spot)	$2,314.80	-0.79%
Silver (Spot)	$29.62	-0.64%
Crude Oil (WTI)	$75.47	-1.72%
Brent Crude	$79.72	-1.45%
Natural Gas (US)	$2.78	-0.39%
Copper (LME)	$9,648	+0.21%

CURRENCY TRACKER

USD/INR	94.77	+0.26%
EUR/INR	108.84	+0.11%
GBP/INR	126.36	+0.18%
JPY/INR	0.607	-0.15%

QUOTE OF THE DAY

"Capital follows conviction. Conviction follows knowledge."

– Dr. Aditya Vijay Kashyap

INDIA FOCUS

RBI Maintains Growth Focus

RBI continues to balance inflation management with growth. Liquidity remains adequate and system resilient.

Infrastructure Spending Drives Growth

Government capex remains strong. Key sectors including roads, railways, airports, and logistics attracting significant investments.

Hospitality & Tourism Momentum

Strong travel demand and higher occupancy rates support revenue growth and investor interest in hospitality assets.

GLOBAL HIGHLIGHTS

Oil Prices Retreat

WTI crude falls on easing supply concerns and expectations of stable global demand.

US Yields Stay Elevated

Markets monitor Fed commentary; higher yields influencing global capital flows.

Gold Under Pressure

Profit booking seen in gold; investors await direction on interest rate path.

CAPITAL FLOW MONITOR

Sectors Attracting Global Capital

Infrastructure	Hospitality	Renewable Energy	Healthcare
Data Centres	Artificial Intelligence	Financial Services	Manufacturing & Logistics

TODAY'S FUNDING OPPORTUNITIES

- **Hospitality:** Premium hotels, resorts, wellness retreats and branded residences.
- **Renewable Energy:** Solar, wind, green hydrogen and storage.
- **Healthcare:** Hospitals, diagnostics, and healthcare infra.
- **Real Estate:** Commercial, logistics, industrial & hospitality assets.
- **Technology:** AI, SaaS, Cybersecurity, Data Infrastructure.

SCORPION CAPITAL STRATEGIC VIEW

India stands at the forefront of a decade of transformation. Strong policy continuity, infrastructure expansion, digital adoption, and global supply-chain shifts create a powerful investment environment. Focus on quality assets, scalability, governance, and sustainability to create long-term value.

Dr. Aditya Vijay Kashyap

Founder & Principal Partner
Scorpion Capital

TOP 25 ECONOMIC NEWS

18 JUNE 2026

1. RBI leaves repo rate unchanged; maintains growth forecast at 6.6% for FY27 (Economic Times)
2. RBI projects CPI inflation at 5.1% for FY27; flags risks from food & energy (Business Standard)
3. RBI relaxes NRE & FCNR(B) deposit norms to attract more overseas funds (Mint)
4. India's retail inflation cools to 4.75% in May; lowest in six years (Financial Express)
5. IIP growth slows to 2.7% in April; mining sector drags performance (Business Standard)
6. India's exports rise 6.1% in May; services exports touch record high (Economic Times)
7. GST collections hit record ₹2.11 lakh crore in May; up 9.4% YoY (Mint)
8. Government raises capex target for FY27 to ₹15.5 lakh crore (Financial Express)
9. India's forex reserves rise $2.1 billion to $689.3 billion (Business Standard)
10. Banks' credit growth rises to 11.2% YoY in May (Economic Times)
11. PSU banks report strong Q4 results; asset quality improves further (Mint)
12. SEBI proposes new framework for SME IPOs to improve transparency (Business Standard)
13. NSE IPO preparations in final stages; DRHP expected soon (Economic Times)
14. FY27 GDP growth seen at 6.5%-6.7% by leading global agencies (Mint)
15. India Inc to invest ₹1.2 lakh crore in renewable energy projects (Financial Express)
16. Rupee strengthens to 94.77 against USD on dollar softening (Business Standard)
17. India and UK inch closer to finalising FTA by July (Economic Times)
18. Aadhaar-based eKYC to be mandatory for all securities markets from July (Mint)
19. India to issue sovereign green bonds worth ₹20,000 crore in FY27 (Financial Express)
20. Core sector growth rises to 3.6% in May (Business Standard)
21. RBI's liquidity infusion continues; surplus liquidity at ₹2.28 lakh crore (Mint)
22. India's private equity investments rise 18% YoY in Q1 FY27 (Economic Times)
23. FPIs invest ₹15,500 crore in Indian equities in June so far (Business Standard)
24. Digital payments cross 150 billion transactions in May; new record (Mint)
25. India's merchandise trade deficit narrows to $19.8 billion in May (Financial Express)

Source: Economic Times, Business Standard, Mint, Financial Express, Reuters, Bloomberg

STAY INFORMED. STAY AHEAD.

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