

OMNIVISTA

SEP – 2025



In this episode, Vikas Gupta, CEO of Omniscience Capital, explores capex-driven banking growth, emerging power-hungry sectors, global opportunities, and why liquidity and valuation outweigh brand names.

[Watch here...](#)

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The content herein is intended solely for educational and knowledge-building purposes, designed to provoke thought and share insights.

SEPTEMBER MONTH OVERVIEW

GROWTH VECTOR: LOGISTICS + MFG

A key driver of India's logistics boom is rising industrial output, backed by Make in India and PLI schemes. As sectors like electronics, renewables, autos, and chemicals scale up, domestic capacity grows- fueling parallel demand for efficient, reliable logistics to support this expansion and supply chain competitiveness.

Read our full report [here...](#)



OMNIVIEW – SEP 2025

Only Scientific Investors can benefit from OmniScience's Scientific Investing Framework

Most clients of investment services choose their fund manager or adviser based on the past performance of the fund. Even here the focus is on the recent performance. Typically, they would choose the fund manager with the highest recent performance. Of course, what is recent performance itself varies by time frame from last 1 month, to last 1 year to very rarely last 3 years. Hardly anyone looks beyond that.



Dr. Vikas V. Gupta

While the real track record to evaluate is how a fund manager has performed over a full market and economic cycle. This would be at least a 5-year period with one bull and one bear market, at least. Similarly, the period should cover an economic boom and an economic recession period. The economic and market cycles can differ in timings of their ups and downs.

Now coming to what the clients believe when they are outsourcing to a fund manager. They have a view of how one should participate in the markets and benefit from them.

Some who have been exposed to trading think that they are outsourcing their trading to their fund manager. The reason to outsource is that the fund manager is more “professionally trained”, so he will trade better. He is full-time employed in this, so will trade better. He has access to more resources, so he will trade better. He is being paid professionally for this, so he will trade better. The flaw is that because the client believes trading is the way to make money in the markets, he thinks the fund manager would do what the client does but at an amplified pace and size.

So they expect the fund manager to work with their concepts of trying to find stocks which will go up in the near term and then get out of them just before they peak and move into other stocks just in time to buy them before they start going up. Also, the fund manager should be able to sell at market peaks and move into cash and buy at market bottoms and deploy cash.

So their objective is a nearly monthly or 3-monthly (very long term in their opinion) profit making cycle. So deliver 5% per month, or some are more liberal, deliver even 5% per quarter, and they are happy. And don't let the portfolio become negative. Let it be positive with a 5% per quarter return and that is all they ask for. Is that too much to ask for? Especially when they are paying fund management fees?

We think that clients should understand that the reason they are outsourcing is to get it managed professionally by people who understand the nature of the economy and markets and understand how to define the objectives and processes of what fund management is about.

We have done that with the Scientific Investing Framework. The objective is not to generate 5% per quarter, but to generate returns higher than the markets (typically represented by Nifty 50, Nifty 500 or S&P 500 etc.) over the long-term while also attempting to preserve capital. Typically, this term could be 5 years or more, and most of the times it could happen within 3 years too. But the objective is not to chase short-term returns since that is likely to ensure poor performance over the long-term. Of course, the nature of the markets is such that no one can guarantee that the objectives are met.

The Scientific Investor, who is the ideal client for OmniScience's investment services, has the following characteristics: Originality, Character and Patience. He knows that to generate alpha the investment process has to be original and the portfolio has to be original, meaning the selection process is different from what most market participants are following and the resulting portfolio is different from the market portfolio.

Similarly, going against the market and allocating capital to an original portfolio requires strength of character. Since, money is being put into stocks which are not the favorites of Mr. Market, they are likely to perform negatively in the near term. This requires significant character strength and belief in the selection process and investment philosophy.

Finally, the portfolio is expected to work out over the 3-5 year timeframe. So it requires patience. In the near term, the portfolio could be volatile and look negative.

Why does the Scientific Investing Framework require such a Scientific Investor as client?

Scientific Investing focuses on buying companies with strong businesses generating profits and ideally positive cash flows. Further, these companies have large growth opportunities, being exposed to long-term growth vectors, and have capabilities and resources to capture and benefit from those growth vectors. Finally, these are companies which Mr. Market currently dislikes due to either ignorance about their opportunities or due to some near-term, temporary negative sentiments. This situation helps in making these great companies available at great prices, meaning they are available at significant discounts to their intrinsic values.

So the revenues, earnings, cash flows and networth of these companies are stable or growing but they are available below the valuations they should be at given their growth rates and capital efficiency. During the "holding period" or the "patience period", the stocks are likely to continue growing their fundamentals, i.e., revenues, earnings and networth. However, the valuation re-rating could take anywhere from 6 months to 6 years or more, though typically the observation is that it happens in 18 months to 36 months.

Due to the above dynamics, OmniScience's Scientific Investing Framework is suitable only for the Scientific Investors. We wish others the best!

Q1 GDP REPORT: INDIA ACCELERATES TOWARD ROBUST GROWTH

FY26 Q1 GDP growth rate signals a return to a high-growth economic regime. Over the last three quarters we see a clear uptrend (3Q25: 6.4%, 4Q25: 7.4% and now 1Q26: 7.8%). The Q1 growth was one of the fastest growths among major economies such as USA (2.1%), China (5.2%), Japan (1.2%), UK (1.2%) and France (0.7%). The first quarter growth is robust as strong growth is seen across sectors such as manufacturing (7.7%) and construction (7.6%) and services (9.3%).



Ashwini Kr. Shami

We expect this growth momentum to continue with support from the current festive season and the consumption boost due to tax cuts and a benign interest rate environment.

Some of the leading indicators such as PMI data suggest the same. Services PMI surged to 62.9 in August 2025 - the fastest pace seen in the last 15 years. Manufacturing also surged, lifting the composite PMI to a 17-year high of 63.2.

The government's long-term strategic investments in infrastructure coupled with policy reforms is showing in a low and stable inflation environment with easing of supply chain bottlenecks. The recent CPI numbers have ranged between 1.6% to 2.1% over the past three months and the inflation projection for FY26 is around 3%. The July inflation rate at 1.61% was the lowest reading since Jun 2017. Additionally, negative food inflation was observed in Aug 25, down from 10.9% in Oct 2024. While a low and stable inflation rate environment boost consumption, it may also be noted that all these current and projected inflation numbers are at the lower end of the RBI's target range of 2-6% and hence there is a strong case for further rate cuts by the central bank. Fiscal measures announced by the government to support growth along with the expected policy rate cuts from 50-100bps by the end of this financial year could spur consumption further and provide continued support for economic and earnings growth.

On the international front, we see the US-tariff related trade tensions to have limited impact on the GDP growth as progress can already be seen toward a trade agreement. Trade negotiations process is anyway expected to involve multiple stages, and the first tranche of the trade deal could be expected around November. Meanwhile, India has either concluded or is currently negotiating trade deals with several countries, including the UK, EFTA, UAE, Mauritius, and Australia, which gives it additional leverage in bilateral discussions with the U.S. while opening new avenues for growth of exports.

In the near term we expect U.S. Fed to cut policy rates and switch to an accommodative stance to focus on stimulating economic growth amid slowing labour market, provided the inflation numbers remain relatively stable. This could be a significant trigger for FII inflows, potentially driving markets higher. We have seen continuously strong DII net buying, and any pause in FII net selling- similar to the trend seen from March to June this year- is expected to be a positive catalyst for the markets.

MACROECONOMIC INDICATORS

ECONOMIC ACTIVITY:

Macro Trends	Current	Previous	Latest Reported Date
S&P Global Manufacturing PMI	59.3	59.1	Sep 01, 2025
India Nikkei Services PMI	62.9	60.5	Sep 03, 2025
Bank loan growth(%)	10.2%	9.8%	Aug 29, 2025
Deposit growth (%)	10.1%	10.1%	Aug 29, 2025
India Industrial Production YoY	3.5%	1.5%	Aug 28, 2025 (Jul)
Trade Balance (E-I) (Billion USD)	-27	-19	Aug 14, 2025 (Jul)
Monetary:			
WPI (YoY)	-0.58%	-0.13%	Aug 14, 2025 (Jul)
CPI (YoY)	1.55%	2.10%	Aug 12, 2025 (Jul)
Repo Rate	5.50%	6.00%	Jun 06, 2025
Bank Rate	5.75%	6.25%	Jun 06, 2025

GDP:

Particulars	Q4FY25 (Est.)	FY25 (Est.)	Q1FY26 (Est.)	FY26 (Est.)
Nominal GDP growth (%)	10.8%	9.8%	8.8%	10.1%
Real GDP growth (%)	7.4%	6.5%	7.8%	6.7%

OTHER KEY INDICATORS:

Particulars	Aug 31, 2025	Jul 31, 2025	Change
India 10-yr Bond Yield	6.59%	6.38%	+21 bps
USD/INR	88.2	87.5	-0.74%
FX Reserves (Billion USD)	691	698	-1.07%
FII Net Buy/-Sell (Rs Cr)	-46,903	-47,667	-72,572 (YTD)
DII Net Buy/-Sell (Rs Cr)	94,829	60,939	3,24,312 (YTD)
Commodities:			
10g Gold	1,06,400	1,01,260	5.1%
1 Kg Silver	1,25,000	1,13,000	10.6%
Crude Oil (USD/Bbl)	64	69	-7.6%
Lithium (CNY/T)	79,740	72,045	10.7%
Cobalt (USD/T)	33,335	33,335	0.0%

Particulars	Month	2025	2024	Δy-o-y (%)
GST Collection (Rs Cr)	Aug	1,86,315	1,74,962	6.5%
UPI Transactions Value (Rs trillion)	Aug	24.9	20.6	20.6%
No of UPI Transactions (Volume in Cr)	Aug	2,001	1,496	33.7%
Power Generation (BUs)	Aug	134	131	1.9%

Source: OmniScience Insights Labs, <https://in.investing.com/economic-calendar/>,
<https://www.npci.org.in/what-we-do/upi/product-statistics>, <https://tradingeconomics.com>

OmniScience Smallcases: Valuation Metrics as of 31st Aug 2025

Product Name	P/E	P/BV	Div. Yield
Omni Super Dividend	7.9	1.2	3.63%
Omni Capital Enablers	8.5	1.1	2.03%
Omni Bank on Bharat	8.8	1.1	1.81%
Omni Knights - MidCap	9.7	1.2	2.00%
Omni Royals - LargeCap	11.3	1.6	2.04%
Omni Flexicap Superstox	11.4	1.4	1.87%
Omni Commercial Czars	11.5	1.5	2.37%
Omni UP & Ayodhya	12.3	1.5	1.83%
Omni Power - Electrifying India	12.3	1.6	2.16%
Omni Fintech, Digital Bank & Payments	12.4	1.6	1.57%
Omni Amrit Kaal	12.8	1.6	1.63%
Omni Supertrons - Smallcap	15.5	1.9	1.22%
Omni Future of Mobility	17.3	2.2	1.57%
Omni Bharat Defence	20.9	2.7	1.32%
Omni DX- Digital Transformation	20.9	3.5	1.83%
Omni Bullet Train	21.0	2.7	1.49%
Omni AI-Tech Global	21.7	3.7	1.87%
Omni Manufacturing Magnates	22.7	3.0	0.98%
Benchmarks			
Equity Largecap	22.6	3.5	1.32%
Equity Midcap	33.8	4.7	0.88%
Equity Smallcap	43.3	5.5	0.47%
Equity Multicap	26.1	3.9	1.12%

Source: OmniScience Insights Labs, <https://omniscience.smallcase.com>

Equities Market: Performance as of 31st Aug 2025

Total Returns (%)	1 Month	1 Yr	5 Yr
Nifty 50	-1.2%	-2.0%	17.9%
Nifty Midcap 150	-2.8%	-4.8%	27.6%
Nifty Smallcap 250	-3.6%	-8.6%	28.8%

Equities Market: Valuation Metrics as of 31st Aug 2025

Sectoral Indices	P/E	P/B	Div. Yield
Nifty PSU Bank	7.0	1.1	2.8%
Nifty Oil & Gas	11.4	1.5	2.4%
Nifty Bank	14.6	2.0	1.1%
Nifty Financial Services	16.7	2.7	1.1%
Nifty Private Bank	17.5	2.0	0.6%
Nifty Metal	17.5	2.4	2.5%
Nifty 50	21.5	3.3	1.4%
Nifty 500	23.5	3.5	1.2%
Nifty IT	25.4	6.8	3.1%
Nifty Auto	25.6	4.5	1.2%
Nifty Smallcap 250	31.5	3.6	0.7%
Nifty Pharma	31.6	4.7	0.7%
Nifty Midcap 150	32.1	4.5	0.9%
Nifty Healthcare Index	37.2	5.4	0.6%
Nifty Realty	41.8	4.1	0.3%
Nifty FMCG	42.1	10.7	2.0%
Nifty Consumer Durables	69.5	13.6	0.4%

India's Manufacturing Revolution: Investing in the Next Phase of Amrit Kaal

The Indian manufacturing sector currently stands as one of the primary growth sectors in India, catering to both domestic and international markets. First 2 phases of India's transformation through the Amrit Kaal vision focused on building the digital and the physical infrastructure.

India is poised to continue emerging as a preferred destination for manufacturing investments due to the availability of raw materials, low labor costs, a favorable corporate tax rate for manufacturing, and proactive government support through incentives.

The Industry sector currently accounts for 27.3% of India's GDP, and is expected to increase its share to more than 30% by 2035. By then India's GDP will potentially reach \$10 trillion, giving more than \$3 trillion opportunity for Industry sector as compared to \$1 trillion now.

The manufacturing sector's expansion will not only contribute to GDP growth but also generate substantial employment, reduce import dependency, and improve trade balances. To realize this potential, the sector must adopt advanced manufacturing technologies, improve supply chain efficiencies through infrastructure development, and foster a conducive business environment.

Inside the report:


- The state of Indian Manufacturing
- Global Economic Landscape
- Key Growth Drivers
- Impact of PLI Schemes
- Case Study: Atmanirbhar Bharat in Defence
- Valuation Insights



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Scientific Investing & Global Opportunities | Omniscience Capital | Vikas Gupta

In this episode of MPU – Market Pillars Uncovered, meet Vikas Gupta — CEO at Omniscience Capital and a pioneer of scientific investing. From identifying industries to watch, to decoding opportunities across Indian and global markets, he dives deep into capex-driven banking growth, the power-hungry sectors of the future, and why liquidity and valuation matter more than just a great company name.

 What you'll hear in this episode:

- Industries to Watch Out For
- How to Invest in Indian and Global Markets
- Insights into Scientific Investing
- Focus on Cap Size
- Deep Dive into Global Investment Opportunities

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Scientific Investing & Global
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OmniScience in the NEWS

1 Want Rs 3 Cr By 60? Here's The Right 12-Year SIP Strategy for A 48-Year-Old Earning Rs 4 Lakh

A 48-year-old earning Rs 4 lakh/month can realistically build a Rs 3 crore corpus by 60 through disciplined SIPs of Rs 1–1.3 lakh/month, assuming 10–12% returns. Experts caution, however, that Rs 3 crore is too modest- Rs 10–15 crore is a more suitable goal given rising costs and longevity.



The screenshot shows the Good Returns website header with market prices for Silver, Petrol, Diesel, Crude Oil, and USD. The article title is "Want Rs 3 Cr By 60? Here's The Right 12-Year SIP Strategy For A 48-Year-Old Earning Rs 4 Lakh" by Vipul Das, published on Saturday, August 2, 2025. The article text begins with: "Retirement planning has become a critical part of modern financial strategy. With increasing life expectancy, thanks to the scientific developments as well as rising healthcare costs, an individual must take a structured approach to ensure that they can maintain their financial independence and keep up with the ever increasing lifestyle spending."

2 Manufacturing Growth

India, now the world's 4th-largest economy, struggles with manufacturing—only 14% of GDP in FY25 versus China's 26%—while services dominate at 55%. Despite weak merchandise exports (1.8% global share), policies like PLI and Make in India are boosting sectors like electronics, pharma, and engineering, hinting at a \$3T industrial opportunity by 2035.



The infographic, titled "THE MACRO PICTURE", is set against a background with "ECONOMY • INDUSTRY" text. It lists three key points:

- India has for long been trying to boost its domestic manufacturing and export capabilities
- Manufacturing growth has lagged overall economic growth
- Schemes such as Make in India, production-linked incentives and export

 To the right, text explains that India's total exports of \$824.9 billion in FY25, with services at 47%, rank India 16th in merchandise exports and 7th in services exports. It notes India's 56.2% share in total exports is below the global average of 75.3%. Another report by OmniScience Capital highlights challenges, noting a \$3 trillion opportunity in India's industrial sector by 2035, while China's industry share in GDP was 38% in 2023, compared to India's 14%.

3 Quote on Monthly Market Commentary by Ashwini Shami, President and Chief Portfolio Manager at OmniScience Capital

July saw a broad market correction, with Nifty 50, midcap, and smallcap indices down 2.8–3.6%, FII net selling of ₹47k cr, but DIIs supported with ₹60k cr inflows; IT, Defence, Media, and Realty lagged amid valuation concerns.



4 Donald Trump looks to ramp up tariffs on semiconductors. Will it impact the Indian auto sector?

The proposed 25% U.S. tariff on semiconductors could disrupt global supply chains, impacting industries reliant on chips, including India's automotive sector.



5 Tariff turmoil prompts rethink: Investors pivot to domestic plays amid global trade shock

Global tariff uncertainties are pushing investors to pivot from export-heavy sectors to domestic demand-driven plays like banking, FMCG, and infrastructure.



6 Quote on RBI MPC Announcement by Dr. Vikas Gupta, CEO & Chief Investment Strategist at Omniscience Capital

Dr. Vikas Gupta noted that with inflation at target and GDP growth steady, the RBI's neutral stance is prudent, though US tariffs on Indian exports could add market volatility.



Quote on RBI MPC Announcement by Dr. Vikas Gupta, CEO & Chief Investment Strategist at Omniscience Capital

Below the Quote on RBI MPC Announcement by Dr. Vikas Gupta, CEO & Chief Investment Strategist at Omniscience Capital

"RBI has a very comfortable situation currently in terms of the macros. Inflation is exactly at the target of 4%, GDP growth is strong with 6.5% and increasing. Bank balance sheets extremely strong with crr of 1.7%, system liquidity adequate. Now the joker in the pack is the Trump Tariffs which could upset the apple cart. It is difficult to decipher the impact of these and one has to be cautious in figuring out the eventual impact. It could have impact on the exchange rate and fl flows. Forex rates also have impact on inflation going forward."

7 Want expert to decide fund picks, allocation, rebalancing? Go for FoF

Fund-of-Funds provide diversified, expert-managed investment across multiple mutual funds, simplifying allocation and rebalancing, but come with higher fees and tax complexities.



Want expert to decide fund picks, allocation, rebalancing? Go for FoF

Samir Sarraf

Fund-of-funds (FoFs), which invest in other mutual funds, offer diversified exposure to various asset classes and sectors, and are a good way to diversify your portfolio. They are managed by experts who decide on the fund picks, allocation, and rebalancing. This makes them a convenient option for investors who want to simplify their investment process and rely on professional expertise.

How are they taxed?

Equity FoF

Equity-oriented FoFs are classified as equity funds if they invest 80% or more in equity shares of Indian companies. They are taxed at 15% on capital gains and 10% on dividend income.

Debt FoF

Debt-oriented FoFs are classified as debt funds if they invest 80% or more in debt securities. They are taxed at 20% on capital gains and 10% on dividend income.

8 China outpaces India amid emerging market turmoil; valuation gap hits record \$6.3 trillion

India's equity market lags China, with MSCI India up 2.2% vs. China's 9.4% over three months, creating a record \$6.3 trillion valuation gap as India trades at 21x forward earnings versus China's 11.9x.



China outpaces India amid emerging market turmoil; valuation gap hits record \$6.3 trillion

China outpaces India amid emerging market turmoil; valuation gap hits record \$6.3 trillion

According to data from Bloomberg, the MSCI India Index has lagged its Chinese counterpart by nearly 10 percentage points this quarter, marking India's worst relative annual performance since 2017. Currently, the MSCI India trades at more than 21 times its one-year forward earnings, compared to just 11.9 times for China.

9 Stock Market Outlook: Sensex, Nifty Recovery Signals Bullish Intent Amid DII Buying; Key Resistance at 25,000

Commenting on the potential impact of the U.S. tariff hike, Vikas Gupta, CEO of Omniscience Capital, noted that while the move could affect approximately \$48 billion or 55% of Indian exports to the U.S., the overall impact on the broader Indian market may be limited.



good returns | BSE: +0.15% | Nifty 24,734.30 | +0.08% | 25k Gold ₹ 5,795/gm | Silver ₹ 1,37,000/kg | Petrol ₹ 103.50 | Diesel ₹ 95.50

Stock Market Outlook: Sensex, Nifty Recovery Signals Bullish Intent Amid DII Buying; Key Resistance at 25,000

By Harshika Yadav | Updated: Friday, August 8, 2025, 8:46 (IST)

Share This Article

Dalal Street is expected to open on a cautious note today, Friday, August 8, 2025, as indicated by GIFT Nifty, which is down by 19.9 points or 0.08% in early trade. This signals a flat to slightly negative start for benchmark indices such as the Nifty 50 and the Sensex.

10 MFs inflows up 81% to ₹42,702 cr in July

Vikas Gupta, CEO of OmniScience Capital, said that the investors seem to be following a policy of buy more on dips and continue with the sips.



MFs inflows up 81% to ₹42,702 cr in July

RAVI RANJAN PRASAD
MUMBAI, AUG. 11

The equity mutual fund (MF) inflows rose sharply by 81.04 per cent to record ₹42,702.35 crore in July as investors took advantage of market correction, compared to ₹23,587.05 crore in June, according to the Association of Mutual Funds in India (AMFI).

Monthly inflows through systematic investment plan (SIP) also rose to a new high of ₹28,464 crore while MF industry's total assets under management (AUM) rose to new high of

MONTHLY inflows through SIPs in July rises to a new high of ₹28,464 crore.

DEBT MF inflows stood at over ₹1,068 lakh cr as compared to outflow of ₹1,711.4 lakh crore in June.

STOCK markets recovered on Monday from Friday's loss with benchmark index Sensex gaining 746.29 pts.

11 Despite steep tariffs, OmniScience's Vikas Gupta sees strong earnings recovery in 2HFY26

Despite the hefty tariff rate of 50 percent, Vikas Gupta, the CEO and Chief Investment Strategist at OmniScience Capital, still anticipates a strong earnings recovery in the second half of FY26. "The tariffs shouldn't have too much impact on the earnings of most sectors," he said



Daily Voice: Despite steep tariffs, OmniScience's Vikas Gupta sees strong earnings recovery in 2HFY26

It is quite likely that a year from now the tariffs should be much lower, said Vikas Gupta of OmniScience Capital.

SUNIL SHANKAR MATKAR | AUGUST 13, 2025 / 06:50 IST

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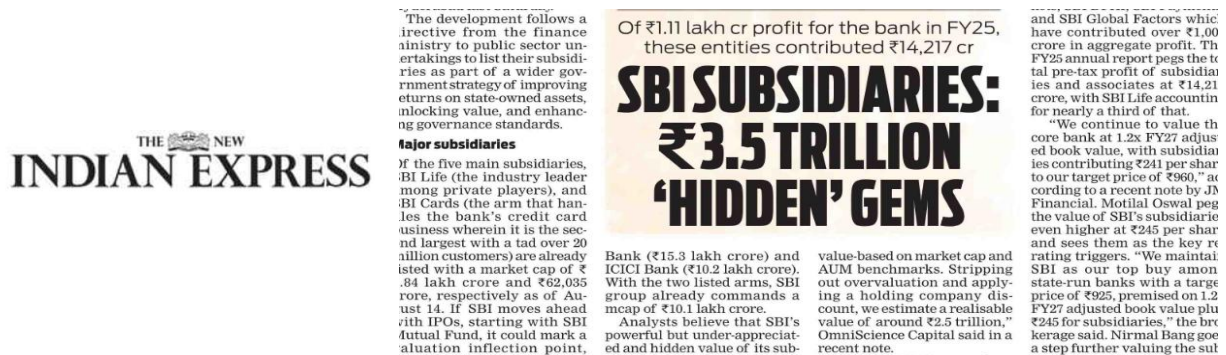
12 Are asset managers a safer bet than brokers in India's capital market?

According to a report by Omniscience Capital, India's manufacturing sector is expected to play a pivotal role in driving economic growth, contributing 20% to the country's GDP by 2035 and presenting a potential market opportunity worth USD 3 trillion.



13 SBI Subsidiaries: ₹3.5 Trillion 'Hidden' Gems

Stripping out overvaluation and applying a holding company discount, we estimate a realisable value of around 2.5 trillion," OmniScience Capital said in a recent note.



14 Bulls back in action on Dalal Street! Why did Indian stocks rally today?

"GST reforms and rating upgrade indicate the strength of the Indian economy, fiscal stability and continued growth potential," pointed Ashwini Shami, chief portfolio manager at Omniscience Capital.



15 Trump tariffs on India in effect: Which countries stand to gain from India's pain? Explained

Ashwini Shami – President and Chief Portfolio Manager, Omniscience Capital, said that he sees significantly more headwinds for the US economy than the [Indian economy](#), as 30-35% tariffs are imposed on Canada, Mexico and China, the largest exporters to the US, accounting for more than \$1.3 trillion of imports.



The screenshot shows the Mint Markets website. At the top, there's a navigation bar with 'mint | Markets', 'E-Paper', and 'OmniScience Capital'. Below this, a market summary bar displays: NIFTY Midcap 100 58958.15 -386.35 (-0.67%) ↓, NIFTY Smallcap 100 17621.95 -126.5 (-0.71%) ↓, and India VIX 10.85 -0.08 (-0.71%) ↓. The main headline is 'Trump tariffs on India in effect: Which countries stand to gain from India's pain? Explained'. A sub-headline reads: 'According to a report by SBI Research, \$45 billion worth of exports will be impacted due to 50% tariffs. The effect of these is already visible in the Indian stock market, with investors churning portfolios to more domestic-oriented companies and away from export-oriented stocks.' To the right, under 'Most Active Stocks', three stocks are listed: Power Grid Corporation Of India share price at 282.30 (down -3.70 (-1.29%)), Bajaj Finance share price at 937.85 (up 41.35 (4.61%)), and Ntpc share price at 332.60 (down -1.75 (-0.52%)).

16 Nifty extends its losing streak into August. Will GST talks, upbeat GDP, and Modi's China visit break the slide?

GDP growth of 7.8% for the first quarter of FY26 is encouraging and reconfirms the resilience of the Indian economy in the face of ongoing tariff turmoil and regional wars," said Ashwini Shami, president and chief portfolio manager at OmniScience Capital.



The screenshot shows The Economic Times Markets website. The header includes 'THE ECONOMIC TIMES | Markets', 'English Edition', and 'Today's ePaper'. The navigation bar lists various categories: Markets, Market Data, Masterclass, News, Industry, SME, Politics, Wealth, MF, Tech, AI, Careers, Opinion, and NF. Below this, a sub-navigation bar lists: /FPOs, Expert Views, Investment Ideas, Commodities, Forex, Live Stream!, AIF PMS, Crypto, Bonds, and More. The main headline is 'Nifty extends its losing streak into August. Will GST talks, upbeat GDP, and Modi's China visit break the slide?'. The article content is partially visible below the headline.

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