

Business News Update04.07.2025

“A Kind Word Can Brighten Someone's Day.”

Nifty 50	25,405.3
BSE Sensex	83,239.47
Nifty 100	26,003.00
Nifty MidCap 50	16,860.8
BSE MidCap	46,708.33

Crude oil price can drop to \$55-60 a barrel by December 2025: Premasish Das

It has been a volatile first half for crude oil prices as they dealt with geopolitical developments and US’ tariff-related threats. Singapore-based Premasish Das, executive director for oil markets research and analysis at S&P Global Commodity Insights, tells Puneet Wadhwa on the sidelines of their Commodity Market Insights Forum in New Delhi that the oil markets are expecting oversupply and weak demand in the second half of 2025. Edited excerpts: How are the oil markets approaching the July 9 deadline on tariffs? It’s very uncertain. Initially, the general thinking was that within 90 days of the pause, things would become

Source: [Business Standard, July 3, 2025](#)

Why has the Tata Steel share price been skyrocketing for the last three straight sessions?

Tata Steel share price has been seeing regular gains in the last three trading sessions and is up more than 4% during the period. While the onset of monsoon may impact construction activities and, in turn, steel demand, softly impacting investors sentiment on steel stocks, the expectations on China production cuts are among some reasons leading to the gains in share prices. China Production Cuts—The expectation of China production cuts is driving gains for all metal stocks, including Tata Steel. The China supply and demand equation impacts global commodity prices, including that of steel, with China being the largest consumer of commodities in the world. The China demand had been impacted by the real estate crisis, and various stimulus measures have proved not to be able to lead China steel demand to regain the same mojo. In the backdrop, the China production cuts and a time when global demand concerns also prevail are leading to rising metal prices.

Source: [Livemint, July 3, 2025](#)

Reliance, Bharti Airtel to ICICI Bank: Motilal Oswal lists its top largecap, midcap, smallcap stocks to buy

While the Nifty 50 trades at stretched valuations and risks of global growth slowdown, due to trade war triggered by US President Donald Trump's tariff policies, persist, top brokerage firm Motilal Oswal Financial Services remains positive about the Indian stock market, with stock opportunities available across largecap, midcap and smallcap segments. Given the current volatility, the brokerage firm has a clear bias towards largecaps and domestic plays. For example, Reliance Industries, Bharti Airtel, ICICI Bank, Indian Hotels, HDFC AMC and BSE are among the stocks in Motilal's model portfolio. Among the sectors, the brokerage firm is overweight on BFSI, consumer discretionary, industrials, healthcare, IT, and telecom, while it is underweight on oil and gas, cement, automobiles, real estate, and metals. Reliance Industries, Bharti Airtel, ICICI Bank, L&T, Kotak Mahindra Bank, Titan, Mahindra & Mahindra, Trent, and Tech Mahindra are the top picks of Motilal Oswal from the largecap segment.

Source: [Livemint, July 3, 2025](#)

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## The invisible barriers: Why women struggle to reach the C-suite

Despite a growing focus on diversity and inclusion, India continues to grapple with a stark gender disparity at the highest echelons of corporate leadership. While women comprise a significant portion of the entry-level workforce, they hold a mere 19% of C-suite roles in India, a figure significantly lagging the global average of 30%. This persistent gap raises critical questions about the underlying systemic and cultural factors hindering women's ascent. According to Rajiv Jayaraman, Founder and CEO of KNOLSKAPE, a firm with extensive experience in culture transformation with Fortune 500 companies, the underrepresentation of women in leadership is not a simple fix. It stems from deeply embedded structural and cultural barriers that demand a comprehensive overhaul, rather than superficial policy adjustments. He argues that the most significant obstacles are often “invisible yet pervasive.”

Source: [People Matters, July 3, 2025](#)

## The quiet Chinese game to disrupt iPhone production in India

At a time when Apple was preparing to ramp up production of its next flagship iPhone in India, hundreds of Chinese engineers and technicians working at its main supplier, Foxconn's factories, have been told to pack up and leave. Over 300 skilled workers have exited Foxconn's iPhone plants in southern India, reported Bloomberg. While Foxconn and Apple haven't officially commented, the timing and silence speaks volumes. The development is more than just a routine reshuffle of manpower. It comes amid growing tension between Beijing and Western tech firms shifting manufacturing away from China and the border dispute between India-China. For Apple, which has invested heavily in expanding its manufacturing footprint in India, the loss of trained Chinese technical staff is a setback. These engineers were not only involved in assembling devices but also in training India's workforce and transferring decades of process knowledge built inside Chinese mega-factories.

Source: [India Today, July 3, 2025](#)

## Trump's deportations are hurting Constellation Brands' beer sales

Constellation Brands' beer sales fell 2% in its latest quarter as President Donald Trump's deportations and consumers' broader economic fears weighed on demand. In April, Constellation CEO Bill Newlands said that Hispanic consumers are spending less due to their concerns about Trump's hard-line immigration policy and possible job losses in industries with high Latino employment bases. During Wednesday's earnings conference call, Newlands acknowledged that raids by U.S. Immigration and Customs Enforcement were making it difficult to predict consumer behavior moving forward, although he demurred about tying the beer division's slowdown to Hispanic shoppers specifically during the company's fiscal first-quarter call. “When you see a fair amount of change, both Hispanic and non-Hispanic consumers are concerned about inflation and about cost structure,” Newlands told analysts. Hispanic consumers are a core part of Constellation's customer base. The brewer, which owns Modelo, Corona and Pacifico, says that roughly half of its beer sales come from Latinos in the U.S. Constellation's earnings and revenue for the quarter ended May 31 fell short of Wall Street's estimates, hurt by weaker beer demand and

Source: [CNBC, July 2, 2025](#)

## As trade war truce with China holds, US lifts curbs for chip design software and ethane

The United States has lifted restrictions on exports to China for chip design software developers and ethane producers, a further sign of de-escalating U.S.-Sino trade tensions including concessions from Beijing over rare earths. Synopsys (SNPS.O), opens new tab, Cadence Design Systems (CDNS.O), opens new tab and Siemens (SIEGn.DE), opens new tab, three of the world's largest electronic design automation (EDA) software developers, said on Wednesday they are restoring access to their software and technology for customers in China. Earlier in the day, the U.S. also sent letters to ethane producers to rescind a restrictive licensing requirement on exports to China imposed in late May and June. The restrictions on EDA software developers and ethane producers were just some of many countermeasures imposed by U.S. President Donald Trump's administration in response to China's export suspension of rare earths and related magnets in April. Beijing's move on rare earths, part of retaliation against Trump's earlier tariffs this year, has upended supply chains central to automakers, aerospace manufacturers, semiconductor companies and military contractors. The issue threatened to scupper a bilateral trade deal.

Source: [Reuters, July 3, 2025](#)