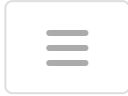




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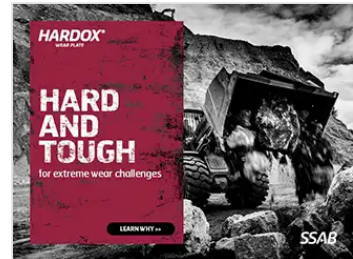
Union Budget 2025: ₹50.65 Lakh Crore Outlay to Fuel Sustainable Growth and Viksit Bharat Ambitions



The Union Budget 2025, presented by Finance Minister Nirmala Sitharaman, sees a marginal increase

in capital expenditure to ₹11.2 trillion for FY26. Though the rise is modest, it underscores the government’s intent to maintain infrastructure-led growth as a key driver of economic expansion.

Covering areas such as tax reforms, infrastructure investment, digitalization, women’s empowerment, Aatmanirbhar Bharat, and social welfare, the Budget outlines several transformative initiatives aimed at fostering growth, inclusivity, and sustainability. It underscores agriculture, MSMEs, investment, and exports as key drivers of development on the path to Viksit Bharat, fueled by reforms and guided by an inclusive vision. The Budget also reflects a balanced approach to road infrastructure, emphasizing sustainable funding, debt reduction, and strategic project execution to enhance connectivity and economic growth.



For FY25-26, total expenditure is estimated at ₹50.65 lakh crore, marking a 7.4% increase over the current fiscal. While the past 3-4 budgets have been capex-focused, this time, there is a significant stimulus in the form of tax benefits. As a result, investment is expected to shift from capex and infrastructure stocks to consumption-driven sectors. The capex outlay for FY26 remains nearly unchanged from FY25, which has disappointed investors and led to a sell-off in capex-intensive sectors.



The Budget estimates net tax receipts at ₹28.37 lakh crore, with a fiscal deficit target of 4.4% of GDP. Gross market borrowings are projected at ₹14.82 lakh crore, while ₹11.21 lakh crore (3.1% of GDP) has been earmarked for capital expenditure.

Prime Minister Narendra Modi hailed it as a "People's Budget" that will boost savings and investment. He stated, "This budget represents the aspirations of 140 crore Indians and fulfills the dreams of every citizen. We have opened many sectors for the youth, empowering the common citizen to drive India's development. This Budget will act as a force multiplier, increasing savings, investment, consumption, and overall growth."

Roads & Highways

The Indian government has reinforced its commitment to infrastructure development by allocating ₹2.87 lakh crore to the Ministry of Road

bottlenecks and improving growth and profitability. We are eager to contribute to this growth and deliver high-quality infrastructure aligned with these strategic advancements.

Subhash Sethi, Chairman, SPML Infra Limited



The Union Budget 2025-26 perfectly aligns with the vision of Viksit Bharat @2047, laying a strong foundation for India's infrastructure growth. It

prioritizes sustainable and modern infrastructure, driving economic resilience, digital transformation, water and wastewater development, and clean energy initiatives.

With an allocation of INR 11.21 Lakh Crore, the government reinforces its commitment to infrastructure expansion. A new asset monetization plan will reinvest INR 10 Lakh Crore into new projects, supported by a three-year PPP pipeline to boost private sector participation. The INR 1.5 Lakh Crore in interest-free loans to states will accelerate capital expenditure, while the INR 1 Lakh Crore Urban Challenge Fund will transform cities into growth hubs.

Water infrastructure remains a key focus, with INR 74,226 Crore allocated, including INR 67,000 Crore for the Jal Jeevan Mission, extending the mission until 2028 for clean tap water connections to all rural households. Another INR 25,276.83 Crore is designated for water resource management and the rejuvenation of the Ganga River. The budget also

emphasizes renewable energy and digital transformation as drivers of future-ready infrastructure. The Clean Tech Manufacturing Mission, backed by the National Manufacturing Mission, will focus on EV batteries and renewable energy technologies, enhancing domestic production, reducing import dependency, and fostering innovation in sustainable energy.

At SPML Infra, we remain committed to strengthening India's future through robust water infrastructure and sustainable energy solutions. This budget sets a clear path for economic growth, job creation, and inclusive, sustainable development.

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