

7-12-2016

Attended meet of the other day -Uma Shashikant,PhD in Finance,CEO CIEL-(Centre for Investment Education & Learning ) and writer . Her views are sought and very highly respected by one & all .

**Take aways...**

- # Duration products in Debt will do well for next 6-12 months.
- # There will be strain on economy for next 3qtrs as business struggles with liquidity.
- # Banking sector will do well.
- # Real Estate, Gold, Luxury Goods, FMCG, Consumer Durables, Cars will struggle to generate demand over next one year.
- # Essential for Manufacturing to shift from High value , low demand products to low value essentials .Eg. Build low cost housing instead of High end Rs10 crore plus Condos or manufacture smaller cars rather than 50 lakh plus high end cars ,etc.
- # Smaller retail businesses will see a lot of pain over the next year.
- # Onus on Govt to push Consumption by spending on infra like roads, rail .
- # Rural consumption which was trumpeted as next saviour by one and all will be sluggish.
- # Rs / \$ volatility will depend on FII views of whether to Invest into India or elsewhere which will only fructify mid Jan-Feb 2017.
- # Budget will be the next big Event.
- # Phased Investment into Equities over next year should give good returns over the next 3-4 years

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