



Weekly Wealth Report

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Global Risks, Local Strength – Where Does India Stand?

Stock Market Mid-Year Review



We have had a busy week in Stock Market because of Trump's Tariff's, Corporate Results, FII Outflows, Global Trade Wars and Valuations.

Indian Equities navigated a volatile first half of 2025. January and February witnessed corrections driven by global tariff uncertainty and geopolitical concerns with the Mid and Small cap indices bearing the brunt.

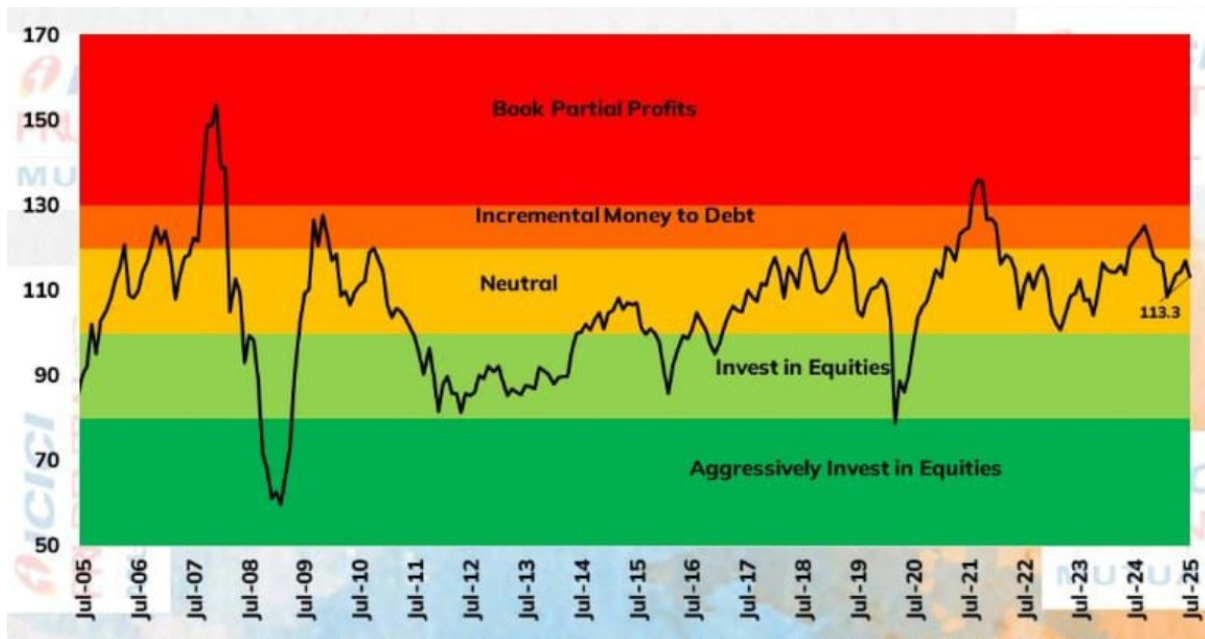
However, markets rebounded sharply as the markets realised local strength driven by strong domestic macroeconomic fundamentals, a very supportive monetary policy and prudent fiscal management.

Indian Stock Markets has not crashed and it is resilient even after US imposed steep 25% tariffs on Indian imports, the highest in Asia (Vietnam (20%), Indonesia and the Philippines, 19% each)

Analysts predict potential tariffs reduction through negotiations is possible with US trade delegation. Even as the government has been guarded in its response to US President Donald Trump's tariffs, an official has sought to paint a rather optimistic picture and said that the impact could be limited to just 0.2 percent of the GDP.

Valuations have undergone a correction

Nifty is barely changed over the past one year while earnings have expanded by 8%. This points to a significant valuation correction over past one year. In a period when interest rates have declined and liquidity has improved.



FY25 GDP growth came in at 6.5% driven by private consumption, Govt spending, Growth accommodative RBI Monetary Policy, Lower Current Account Deficit, Above Normal Monsoon & Lower Inflation.

India's long-term story intact, while near term concerns have risen and could weigh on investor sentiments, medium to long term India story remains intact driven by the following:

- **India's macros remain robust** (Fiscal consolidation, Strong Balance Sheets, Recovery in Consumption etc.) amidst slowing global growth.
- India's long-term growth prospects steady, projected at 6.5% real GDP growth and 10-11% nominal GDP growth.

- **Strong Balance Sheets:** The strength of bank (NPAs below 1%) and corporate balance sheets is notable. India Inc.'s profits are not only growing strong, but they are also generating large amounts of free cashflows – in sharp contrast to 2003-2008, where free cashflows were in deficit.
- Household debt levels are also reasonable compared to global standards. India's aggregate debt to GDP is lower than in 2010, while it has risen globally

Key Factors to watch out for in 2025 are

- Trade Negotiations & Eventual Tariffs
- Geopolitical tensions
- Oil prices
- Progress of Monsoon
- Revival in Consumption
- Credit Growth Revival
- Real Estate Upcycle
- Flows
- Valuation
- Corporate Earnings

Our Recommendation is to go overweight with Flexi Cap for long term, BFSI and Consumption as preferred sectors and Hybrid Funds for 2 – 3 years' time frame.

[Call us @ 78100 79946 for Recommendation and to review your Portfolio Reviews](#)

Weekly Market Pulse

Domestic equity markets declined for the fourth consecutive week, with key benchmark indices BSE Sensex falling by 0.87% on Friday. The longest losing streak in over two years

The fall was broad-based as the mid-cap segment and the small cap segment both closed the week in the red.

Domestic equity markets declined when U.S. Imposed 25% import tariffs on India, escalating geopolitical tension and investor anxiety.

There are Earnings Impact & mixed Q1 Results, Valuation and Credit Concerns

Foreign institutional investors (FIIs) sold ₹25,000 crore in just 8 days, marking one of the steepest capital outflows in recent months

Mixed Q1 earnings: Especially from IT, Pharma, Auto & Financials, triggering sell-offs in heavyweight stocks

Bajaj Finance, Kotak Mahindra Bank, Wipro dropped 3-7% on earnings concerns.

Sun Pharma, Dr. Reddy's, Cipla saw steep losses despite being defensive names

The Indian Rupee fell ~1.2%, ending the week at ₹87.54/USD, reacting to tariff fears and FII outflows

The VIX index rose ~3%, indicating elevated volatility sentiment among investors

S No	Index	Jan 1st 2025	1st Aug 2025	Net Return for the year
1	BSE Sensex	78507	81463	3.63%
2	BSE 150 Sensex Mid Cap	16044	15946	-0.61%
3	BSE 250 Sensex Small Cap	7134	6961	-2.49%
4	BSE Sensex 500	35352	36129	2.15%

Mutual Fund Corner

Invesco India Multicap Fund



Invesco Multicap Fund that invests in stocks across Market Capitalisation and consistently explore opportunities in Large, Mid and Small Cap Space.

Why to Invest in Invesco Multicap Fund?

- 1. The fund adopts a diversified approach and invests across large, mid and small cap companies.**
- 2. Emphasis on bottom up approach to select stocks across the market capitalization range with focus on long term growth with no sector bias.**
- 3. While retaining its flexibility, the fund maintains exposure in the range Large cap companies : 25% - 50% , Midcap & Small cap companies : 50% - 75%**
- 4. The fund will hold around 50 to 70 stocks**
- 5. The fund objective is to construct a portfolio potential long term capital appreciation and can weather multiple market cycles**
- 6. Investors who are looking at long term opportunities can explore this fund without any bias**

To invest in SIP & in Mutual Funds Click the link and start your investments instantly (You can also call us @ 7810079946)

<http://www.assetplus.in/partner/sathishkumar>

This week Media Publications

This Week at Nanayam Vikatan. “Why do you need a Good Financial Advisor and how to identify a Financial Advisor?”



எம்.சதீஷ் குமார்,
நிறுவனர்,
<http://sathishspeaks.com>

ஒரு முதலீட்டாளர் ஒரு கோடி ரூபாய் தொகுப்பு நிதி (Corpus Fund) சேர்க்க வேண்டும் என்கிற இலக்குடன் இருக்கிறார். ஆனால், அவரால் அதைவிடவும் அதிகமாகச் சேர்க்க பண வசதி இருக்கிறது எனில், அவருக்கு இன்னும் அதிக தொகுப்பு நிதியைச் சேர்க்கும் வழியைக் காட்டுபவர்தான் நல்ல நிதி ஆலோசகர். குறைவான வருமானம் ஈட்டுபவர்களையும் கோடீஸ்வரர் ஆக்கும் பணப் பாதை ஒரு சிறந்த நிதி ஆலோசகருக்குத் தெரியும். நம் பொறுப்பு அந்த ஆலோசகர் யார் எனக் கண்டுபிடிப்பது மட்டுமே..!

மியூச்சுவல் :பண்ட் முதலீடு... ஆலோசகர் ஏன் அவசியம்? 7 காரணங்கள்..!

(இந்த வார நாணயம் விகடனில்...)

<https://www.vikatan.com/personal-finance/mutual-funds/guidance-for-mutual-fund-advisor>

Top 2 Sectors to Bet on for High Growth in 2025



**WANT HIGH RETURNS?
FOCUS ON THESE 2 SECTORS!**

**முதலீடு வளர்ச்சி தரும்
முக்கிய 2 SECTORS!**

<https://www.youtube.com/watch?v=6pdRK9RLc9U>

Will Silver yield better returns than Gold?



<https://www.youtube.com/watch?v=3y7P7YkN04w>

How you can own a Home without a EMI?



https://www.youtube.com/watch?v=yPXbX_tHDj8

7 Golden Rules to Transform your Wealth



<https://www.youtube.com/watch?v=rpfjZ886WuQ>

Quote for the Week!



In Wealth Creation, many try to rush their way to the top — Chasing Speculations with greedy hacks. But real growth & sustainable results. That takes time, patience, and consistency.

Just like a marathon, not a sprint — SIP in Mutual Funds helps you build a solid financial future, one step at a time.

✓ Discipline

✓ Compounding

✓ Long-term focus

Build slow. Build right.

Start small. Stay consistent with Mutual Funds. Start a SIP Now. Let time do the magic

All you want to learn about Mutual Funds

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- > Build Wealth Like a Pro

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2. Master the Art of SIP's
3. Build Wealth Like a Pro
4. Recorded session contains 8 Chapters in Tamil Language
5. Lifetime Access

Click the below link for your Mutual Fund course purchase

<https://sathishspeaks.akamai.net.in/new-courses/5-welcome-to-the-world-of-mutual-funds>

All you want to learn about Stock Market

Kickstart your Investment Journey of 2025 from here

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- » 6 POINT FILTER TO SELECT A HIGH PERFORMING STOCK
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Key Highlights:

- 1. Key entry and exit points of the stock market**
- 2. 6-point filter to select a high-performing stock**
- 3. Learn macro-economic trends in stock picking**

Click the below link for Stock Market Course Purchase

<https://webinar.sathishspeaks.com/>

Top 10 Mutual Funds to Invest in 2025



Is your Mutual Fund Portfolio giving less returns?

Rebalance your Portfolio with High Performing Mutual Funds

**Power up your Portfolio with Top 10 Best performing Mutual Funds
of 2025**

Click the below link to purchase for Rs. 999/-

<https://courses.sathishspeaks.com/new-courses/8-top-10-mutual-funds-of-2025>

Middle Class to Million Dollar Book



Man and his struggle to generate and preserve wealth is eternal. One thing which is common among everyone in this society, that everyone has financial dream and aspiration to become Crorepati.

Middle Class to Million Dollar is a guide to understand how simple and common sense in Personal Finance can help you to get wealthy Corpus.

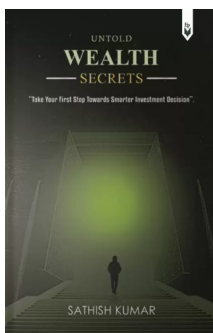
Click here to purchase the book from Amazon

[Buy Middle Class to Million Dollar / மிடில் கிளாஸ் முதல் மில்லியன் டாலர் வரை Book Online at](#)

[Low Prices in India | Middle Class to Million Dollar / மிடில் கிளாஸ் முதல் மில்லியன் டாலர்](#)

[வரை Reviews & Ratings - Amazon.in](#)

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You can also connect with us investments@sathishspeaks.com

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Mutual Funds and Stock Market Investments are subject to market risks, pls read all scheme related documents carefully. Past performance of the mutual fund is not necessarily indicative for future performances. Mutual fund does not guarantee any returns or dividends.

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