

# 4 RECENT DEVELOPMENTS WE SHOULD KNOW!



# 1 IMD FORECAST

The India Meteorological Department (IMD) forecast an above normal monsoon for 2025. The monsoon rainfall over the country is likely to be 105% of the long period average. Good news for agriculture & inflation. Positive for sectors like fmcg, tractors that depend on rural economy



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# 2 INDIA'S INFLATION

-India's inflation eased to 5 year low of 3.34% in March as food inflation declined further. This is good news on 2 front. Lower inflation means more real money in hands of people. RBI will have enough room to cut rates. This news is positive for debt investors.



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# 3 OPEC OIL DEMAND

-OPEC, the oil cartel cut its oil demand growth forecast and also lowered its global economic growth forecast to 3% for 2025. While global news is bad, oil price staying flat to low is good for importers like India. This will help cushion our fiscal condition.



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# 4 INTERNAL SURVEY

We have been speaking to business people on the ground and they are seeing green shoots again in their business. Most of them are seeing business jump between 14%-25%. If this continues, the Q1 FY 26 results could show high earnings growth.



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# INVESTMENT SUGGESTIONS

- keep investing in core equity portfolio spread across market cap &
- aggressively invest in long term government bond funds.



HAPPY INVESTING