

just 5 questions

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■ **Are we headed for a correction or will the party go on?**

While we are certainly cautious in the short term, we believe that the market is

still providing a good buying opportunity for long-term investors.

■ **What should investors do in the current scenario?**

Firstly, stay invested, keeping in mind the long-term growth potential. Also, decide and stick to your asset allocation, stick to quality and diversify your investments.

■ **Which sectors present a good opportunity for medium-term investors?**

Domestic consumption-related sectors and infrastructure-related sectors are attractive from a structural point of view. However, not all stocks in these sectors are likely to perform well and one will need to carefully select the basket of stocks to invest in.

■ **Do you see any factor impacting liquidity?**

We do not see any immediate threat to the benign liquidity scenario.

■ **How do you see the positive inflation building up after months of disinflation?**

The disinflation was illusory and the market will have to reckon with positive inflation soon. One will need to be alert to the developments on the inflation and consequently, on interest rates.