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## **Equity Outlook for April 2025**



A key shift in March 2025 was the return of Foreign Institutional Investors (FIIs) as net buyers after some profit-booking in February which helped drive fresh liquidity into the markets.

In April'25, the markets will closely monitor Jan-March quarter results. Also, tariff implementation may be another factor impacting the markets. We expect consumption recovery to get broad-based as the income tax cuts propel urban demand, coupled with the buoyant trend in rural consumption levels.

Within investments, we see public and household capex driving growth while private corporate capex recovers gradually.

India's long-term story remains intact. India is likely to gain share in global output in the coming decades driven by strong foundational factors including robust population growth, a functioning democracy, macro stability influenced policy, better infrastructure, a rising entrepreneurial class and improving social outcomes.

We think the market is underestimating the impact of tax cuts for the consumer sector as well as RBI's policy pivot (regulatory easing, rate cuts, liquidity boost, MFI relaxations etc.). Current Nifty valuations are close to the long-term average which gives us a lot of comfort and supports a positive long-term return outlook.

Globally, markets will keep an eye on economic data from the US and China, oil price movements and any fresh geopolitical tensions, all of which could sway sentiment. So overall, April looks like a month where earnings, policy and global cues will all be pulling the strings

we expect FII flows to at least stabilize in the next quarter and eventually turn positive over time. For this to happen, our earnings will need to show substantial improvement from current levels.

## Call us @ 78100 79946 for Recommendation and for your Portfolio Reviews

## Weekly Market Pulse

India's stock benchmarks represented by the BSE Sensex and Nifty 50 ended lower by 0.25% and 0.31% respectively on Friday, and IT stocks declined amid caution over upcoming US tariffs, though foreign fund inflows and growth optimism limited the losses.

India's current account deficit (CAD) rose to \$11.5 billion, or 1.1% of GDP, in the October-December quarter of 2024-25, mainly due to a higher trade gap.

Centre's fiscal deficit between April and February 2025 has come in at Rs 13.5 lakh crore.

Domestic equity markets rose amid a broad-based buying across sectors following better than-expected retail sales data in the U.S. and China for Feb 2025.

The Union Cabinet approved the Production-Linked Incentive (PLI) scheme aimed at boosting domestic manufacturing of electronics components.

India approved a major defence deal worth Rs 62,000 crore to acquire 156 Light Combat Prachand helicopters from Hindustan Aeronautical Limited for the Indian Army and Air Force.

S No	Indices	1st Jan	28th March	% Change for YTD
1	BSE Sensex 30	78265	77414	-1.09%
2	BSE Midcap 150	15993	14418	-9.85%
3	BSE Small Cap 250	7104	6039	-14.99%
4	BSE Sensex 500	35259	33579	-4.76%

## **Mutual Fund Corner**

## **Edelweiss Business Cycle Fund**



The Edelweiss Business Cycle Fund evaluates businesses combining Momentum with Value ( PE, PB, EBITDA, Div Yield ) Quality ( ROE, ROCE) and Growth ( EPS, Operating Margin )

This fund invest in a factor-based approach to capture trends in business cycles.

Why to consider Edelweiss Business Cycle Fund?

- **1.** Filter from top 300 stocks by market cap for investable universe.
- 2. Market-cap bias Aims to maintain equal allocation between large caps and mid/small caps.
- 3. Key factors used in the model Growth, Quality, Value & Momentum.
- 4. Construct portfolio of 60 stocks across large cap and mid/small cap universe.
- 5. Select top ranked stocks from each factor combination based on their scores (Value+Momentum; Growth+Momentum; Quality+Momentum)

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**

My Recent Article in Nanayam Vikatan. How to understand Valuations, Entry & Exit in Stock Market?



https://www.vikatan.com/personal-finance/sharemarket/guidance-for-share-investment-7

#### **Business Vs Mutual Fund - Which is better Investment option?**



https://www.youtube.com/watch?v=uGCLwb\_FAUk

### Top 10 Stocks which Fund Managers are buying in Feb!



https://www.youtube.com/watch?v=Rjb7nS5XM\_E

### Top 5 Sectors which Fund Managers are buying in 2025



https://www.youtube.com/watch?v=snWpj\_8LIUA

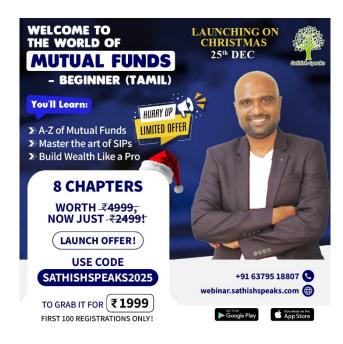
Can you accumulate 5 Crore from a Student SIP?



https://www.youtube.com/watch?v=rNW2Fz-K5no

## All you want to learn about Mutual Funds

## Kickstart your Investment Journey of 2025 from here



What You will Learn:

- 1. A-Z of Mutual Funds
- 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-worldof-mutual-funds

## All you want to learn about Stock Market

Kickstart your Investment Journey of 2025 from here



## Key Highlights:

**<u>1. Key entry and exit points of the stock market</u>** 

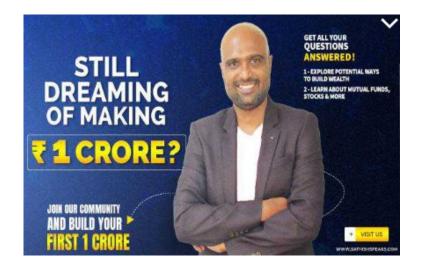
2. 6-point filter to select a high-performing stock

3. Learn macro-economic trends in stock picking

<u>Click the below link for Stock Market Course Purchase</u> <u>https://webinar.sathishspeaks.com/</u>

## My First 1 Crore Club

## <u>Are you still dreaming to achieve a net worth of ₹1 crore?</u>



Still dreaming how to make 1crore?

Still Wondering how a salaried person/professionals can make 1cr?

To all the questions in your mind here is the potential ways to build it through Mutual Funds, Stocks and Much More...

#### Why do you have to join this Community?

- Having money but still doesn't know how & where to invest?
- Selecting wrong Stocks?
- Selecting wrong mutual funds?
- Invested in all possible ways still money haven't doubled?

To all these there is one solution Join our First 1cr Club Webinar by paying just 499/- by clicking the below link

https://sathishspeaks.akamai.net.in/new-courses/1-my-first-1cr-club

## **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/-  $\overline{\Im}$ 

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

#### Middle Class to Million Dollar Book



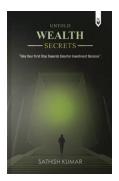
Man and his struggle to generate and preserve wealth is eternal. One thing which is common among everyone in this society, that everyone has financial dream and aspiration to become Crorepati.

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

## To Buy my Untold Wealth Secret Book from Flipkart



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https://www.youtube.com/channel/UCSORk6rz3re4qx2IXQr5o2A

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https://chat.whatsapp.com/CGCtfJIYLdLH5YfGWG3b58



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#### For more information connect with Sathish Kumar @ 9841058689

#### You can also connect with us investments@sathishspeaks.com

Visit - <u>www.sathishspeaks.com</u> for More Details.

#### **Disclaimer**

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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