

# Sensex Shows Signs of Recovery, up 900 Points in March: Should You Adjust Your Mutual Fund Portfolio?

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**Indian Stock Market:** The Indian equity market experienced slight relief in March, with the Sensex rising almost 900 points to surpass the 74,000 marks. As the recovery emerged, market experts are considering large-cap and banking and financial services stocks for lump sum investments.

Vishal Dhawan, CEO of Plan Ahead Wealth Advisors, a Mumbai-based wealth management firm, informed the

Economic Times that large-cap stocks present an investment opportunity. However, he advised caution regarding mid-cap and small-cap stocks, citing high valuations despite anticipated slower economic growth and reduced earnings.

Dhawan highlighted that a broad market rally was driven by metals, oil and gas, and PSU banks. A weakening dollar index supported metals and oil, while the Reserve Bank of India's announcement of liquidity measures aided banks facing liquidity constraints.

"The rally reflects a broad-based recovery, with public sector banks among the top performers following the RBI's announcement. Future market momentum will depend on certainty in the global trade environment and a recovery in urban consumption leading to overall GDP growth," Dhawan added.

## Sensex, Nifty Today

Equity benchmark indices opened with significant losses in Tuesday's morning session, reflecting negative cues from global markets.

After a 371-point gap-down opening, the BSE Sensex fell to 73,668 but subsequently recovered somewhat. At 9:55 AM, the Sensex was down by 300 points, or 0.4%, at 73,800. Similarly, the NSE Nifty 50 dropped to 22,315 and was down 80 points, or 0.4%, at 22,380.

Among individual stocks, IndusInd Bank plummeted 20% to Rs 735 after the private lender disclosed discrepancies in its derivative portfolio. The bank estimated a Rs 1,577 crore (approximately 2.35%) impact on its net worth.

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