

Weekly Outlook



PACE 360
Redefining and Revolutionizing Finance & Wealth

3rd March, 2025



We believe global equities are headed for a massive rally over the next 2-3 months. We see EM equities doing particularly well during this period. We see Indian equities undergoing a V-shaped rally and outperforming both EM and DM equities over the next 2-3 months. This is because of the unprecedented underperformance and carnage in Indian equities in CY25 so far.

After a massive liquidation of Indian equities over the last five months, FPIs are sitting quite light on India and are probably close to exhausting their selling. We see the dollar index plummeting to 104 levels by May. We see precious metals largely range-bound in the near future. We see Treasury bonds also as sideways for now.



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