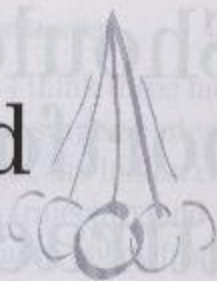




Has the slide stopped?

Will the past winning stocks and sectors lead the recovery?



OPINION IS DIVIDED on this one, but there is some consensus that defensive sectors are worth tracking for future gains

MANEESH KUMAR head, wealth management solutions, ASK Wealth Advisors

Rotating is a common feature of volatile markets; yesterday's heroes may not be tomorrow's superstars. But, some earlier sectors will still work, such as power, infrastructure, metals, banking and financial services.

SANDESH KIRKIRE chief executive officer, Kotak Mutual Fund

This may not necessarily be the case, though some tactical investing can be undertaken in the previous sectoral leaders (real estate and power utilities) as the bounce-back could be impressive. However, tread with caution.

V RAMESH chief executive officer, Prabhudas Lilladher

It is important not to just look at the steep fall, but also at the sector. IT and real estate had a steep fall. I would not advise investors to get into these sectors at the moment and suggest sectors like banking instead.

AMITABH CHAKRABORTY president (equity), Religare Securities

There will be sector rotation. Defensive sectors like pharma, FMCG and agri commodities will do well. One needs to weigh the near-term cash generation ability of the companies, and high dividend yield can be a good indicator.

BHAVESH SHAH vice-president (research), Asit C Mehta Investment

Sectoral allocation will see a change in next couple of months. Banking, telecom, FMCG, pharma, engineering and infrastructure construction sectors are my picks for next six-nine months.

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