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Investors are concerned about long term impact of trade wars and this is what has triggered another sell off in the markets. The emerging market asset class may be the biggest casualties of dollar strength, ET Now reported citing Christopher Wood, managing director, equity strategist at CLSA. The global trade war was triggered after US President Donald Trump announced new tariffs on the imports of various commodities including steel and aluminium from different trading nations. This followed a counter reaction from these nations triggering a full-blown global trade war. The quantitative easing from ECB will remain part of the policy, he also said.

Meanwhile, a few days back, Chris Wood had said that as affordability in real estate sector remains at the best level in 15 years, there is a possibility that high networth individuals may sell their holding in equities and invest in real estate instead, raising risks for the markets.

The Indian investors can now invest in the real estate sector, advised Christopher Wood through his weekly note GREED & fear.

“One risk for Indian equities is that high net worth investors sell stocks to purchase real estate as evidence grows that the residential property cycle has turned up. This would be a negative caused by a positive. GREED & fear again recommends investors to buy into the Indian property sector if they have not already done so. Affordability remains at the best level in 15 years while developers’ pre-sales are rising,” said Chris Wood.

Sharing his plans for Asia portfolio (without Japan), Chris Wood had said that he plans to hike his existent investments in HDFC Bank and Indiabulls Ventures.

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