* industrail- stock: selection; investment in reliance/india(1%), tata/russia(2%)and binali/us(3%)
* industrail- stock: selection; investment in and chaddi/rus(70%)
* energy- stock: underweight; investment in tata power/UK(4%), bmec/france (5%)and mpev/germany(6%)
* communication- stock: overweight; investment in and jio/denmark(7%)
* pharma- stock: selection; investment in sunpharma/india(1%)and Dr reddy/us(3%)