

WHAT ARE WE SEEING

VERSION 1.035

10-01-2020

1. Nation as Brands - Value and Strength

India stands at 7th rank in most Valuable Nation Brands



Source: Brand Finance - National Brands 2019 Report, Visualcapitalist.com

2. Rise of the Formal Financial System

Credit Card payments have shown the maximum 621x jump in the past decade

Major jump

The formal financial system has grown rapidly over the past decade, particularly after demonetization and the popularization of retail-centric products like mutual funds. Here is how various industries have grown in size over the past decade

Sector	(in ₹ cr)		(in times)
	2010	2019	Change in the last decade
Credit card payments ¹	97,873	6,07,94,600	621.15
Debit card payments ¹	14,53,204	39,04,26,400	268.66
NPS assets under management ²	29,852	3,92,467	13.14
Health insurance premiums collected ³	8,305	44,873	5.40
MF assets under management ⁴	7,87,496	26,94,385	3.42
Life insurance premiums collected ⁵	2,65,447	5,08,132	1.91
Real estate sales ⁶	1,71,025 (no. of units)	2,26,643 (no. of units)	1.33

¹Start data for FY12, end data for FY19; Source: RBI

²Start data for FY12, end data as of FY20 till November 2019; Source: NPS Trust

³Total premium underwritten, excluding personal accident and travel insurance business; Source: Irdai Annual report, as of March 2010 and as of March 2019

⁴From March 2010 to November 2019; Source: Association of Mutual Funds in India

⁵Total premium underwritten; Source: Irdai annual report, 2010 and 2019

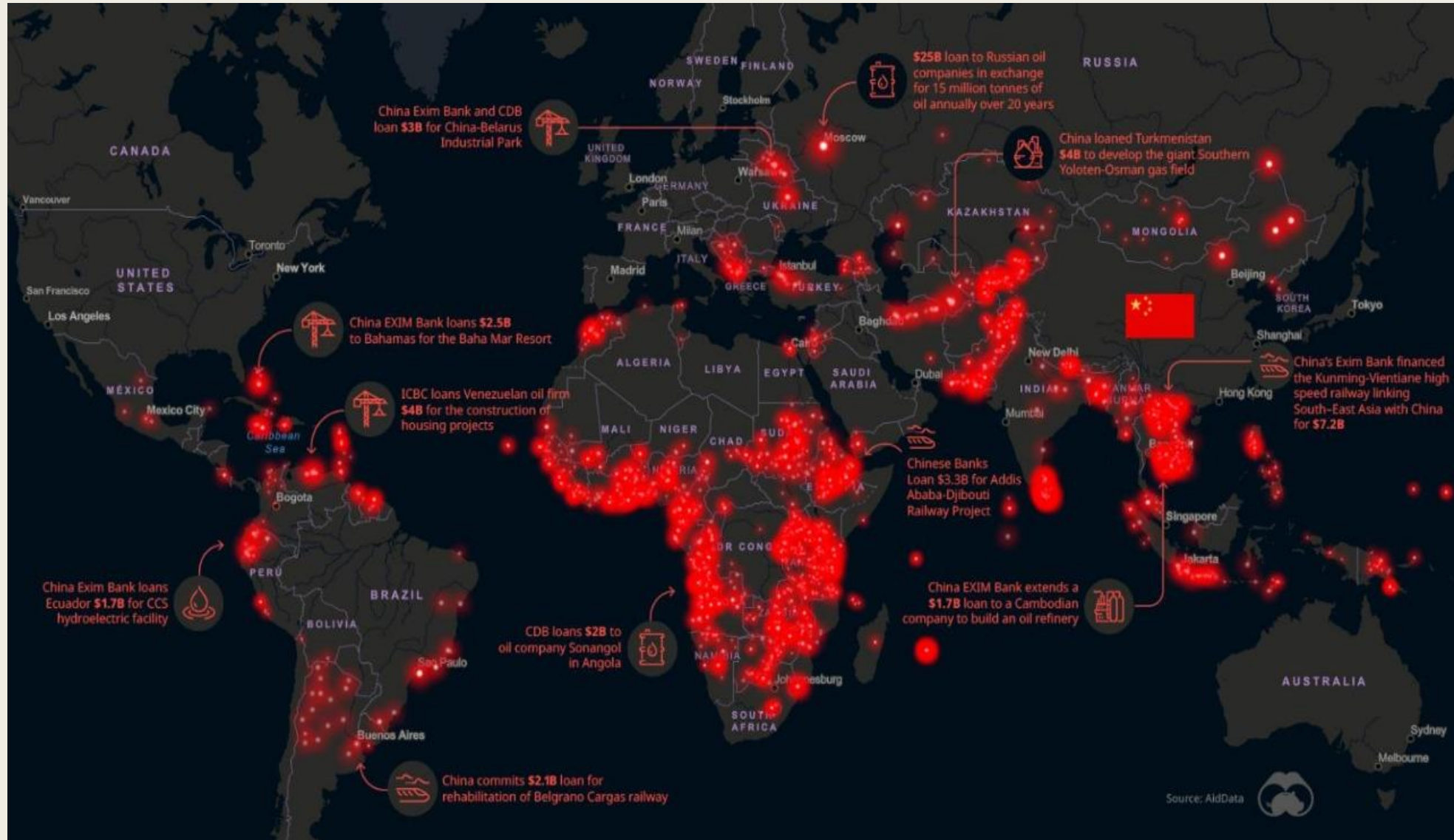
⁶Start data for CY2010, end data CY 2019 (Sept-Dec 2019 estimated); Source: Liases Foras

SANTOSH SHARMA/MINT

Source: Mint research

3. Chinese Financing is Fuelling Global Megaprojects

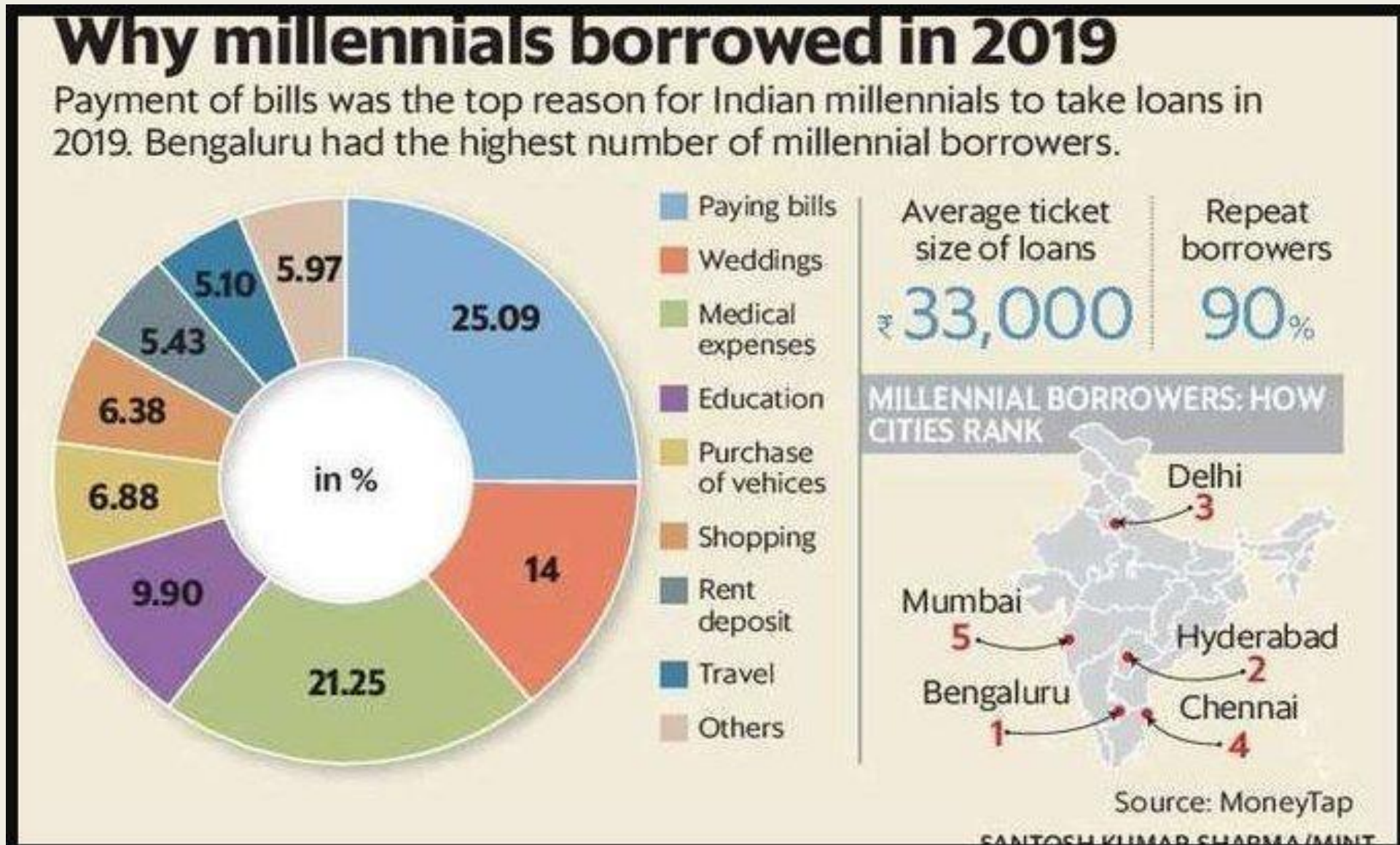
Africa seems to be the biggest beneficiary of Chinese Financing



Source: AidData

4. Lending to Millennials

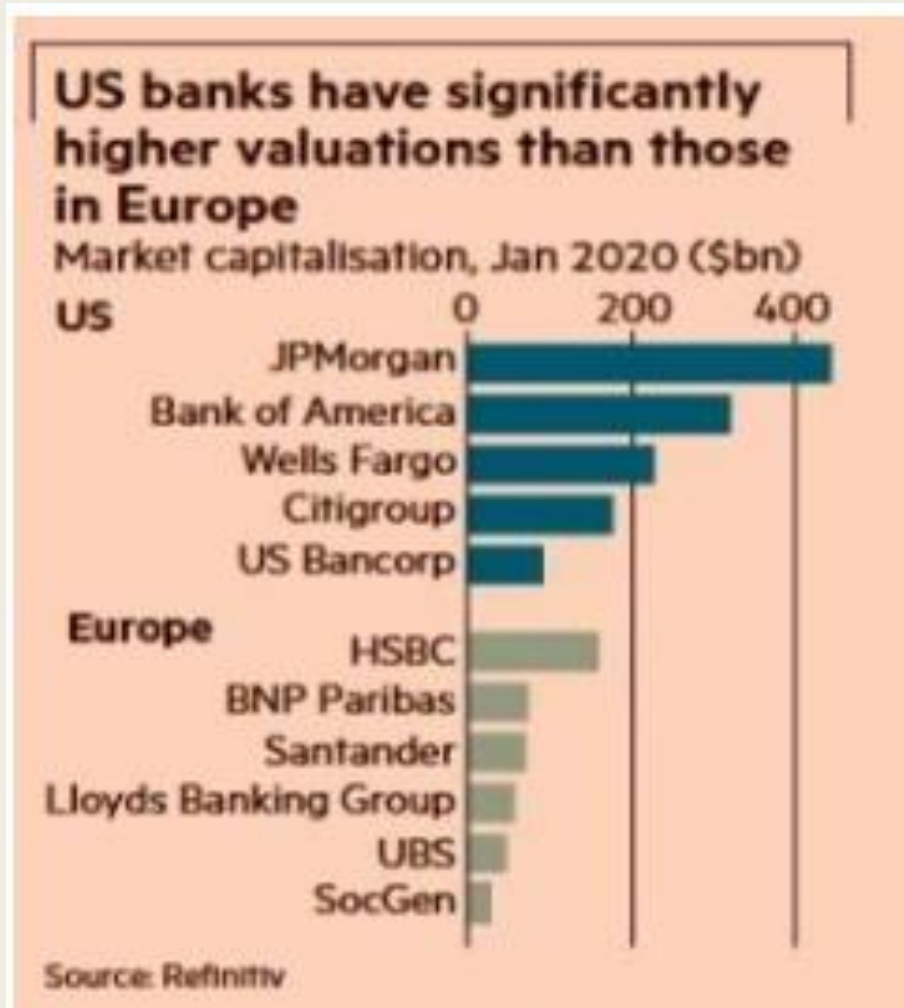
Millennials in India borrowed largely for Paying Bills, Weddings and Medical Expenses



Source: MoneyTap, Mint

5. US Banks Vs. European Banks

US banks have higher valuations and ROE than their European peers

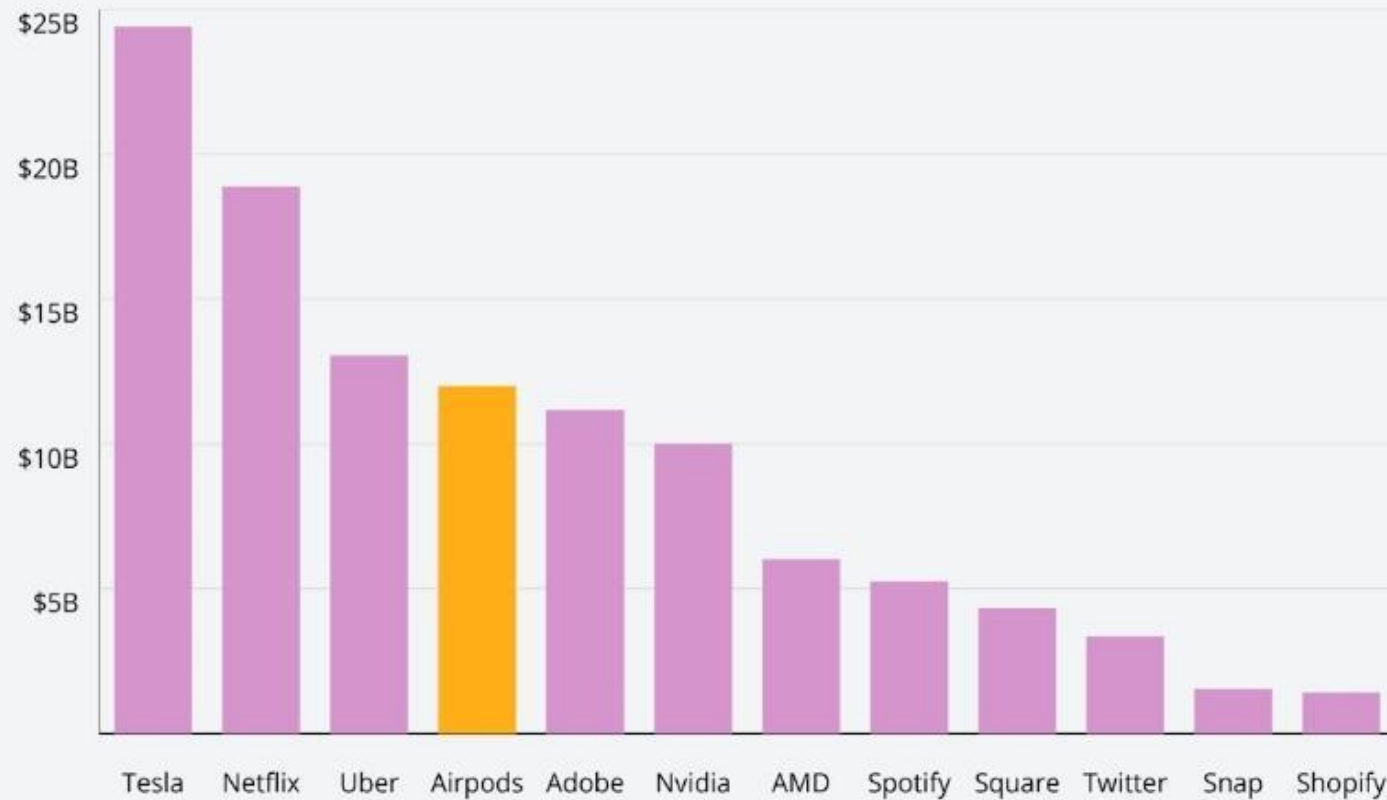


Source: Refinitiv, S&P Capital IQ

6. Apple Still Fresh!

Apple's earphones now generate revenues almost equivalent to corporations like Uber

AIRPODS REVENUE vs. TOP TECH COMPANIES (TTM)



KEVIN ROOKE // @KEROOKE



7. Where the Burger is Expensive

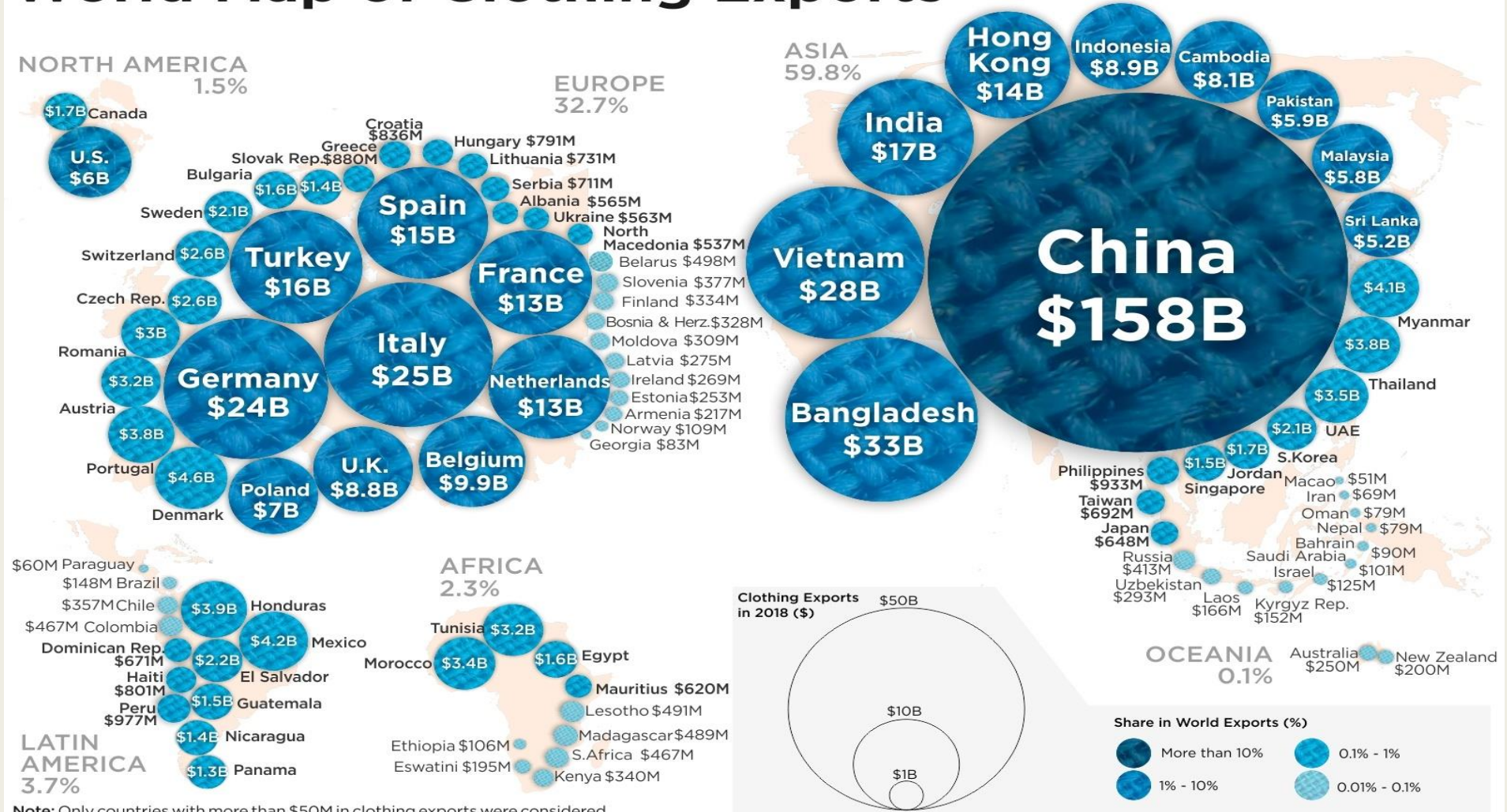
A good indicator of the PPP of a country



8. Global Clothing Trade

India with in-house cotton advantage can improve its market share

World Map of Clothing Exports



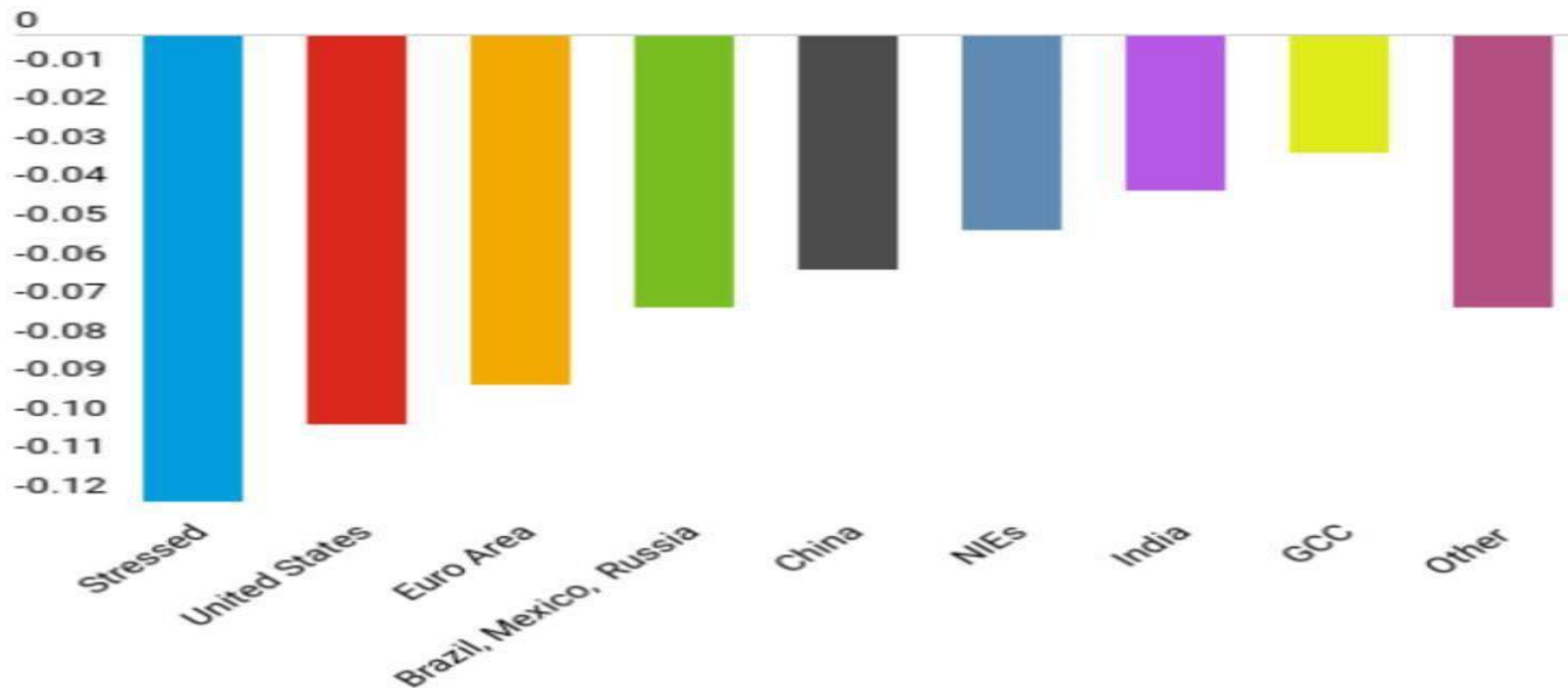
9. Attribution of the Slowdown

Looks like 2019 was a slow year across regions

Weaker and weaker

The slowdown in global growth in 2019 reflects lower growth in several key countries and regions.

(contributions to growth slowdown, percentage points, 2019)



Source: IMF staff estimates.

Note: Stressed economies = Argentina, Iran, Libya, Sudan, Turkey, and Venezuela; NIEs = newly industrialized Asian economies; and GCC = Gulf Cooperation Council.

10. Disney is Ruling the Box Office

7 out of top 10 movie grossers are from Disney

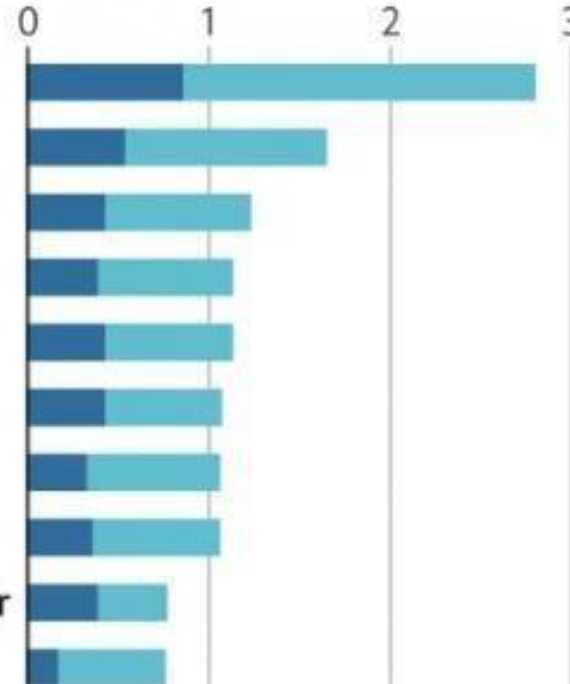
Marvellous

Box-office sales, 2019, \$bn

↓ Disney

- Avengers: Endgame
- The Lion King
- Frozen II
- Spider-Man: Far from Home
- Captain Marvel
- Toy Story 4
- Joker
- Aladdin
- Star Wars: The Rise of Skywalker
- Fast & Furious: Hobbs & Shaw

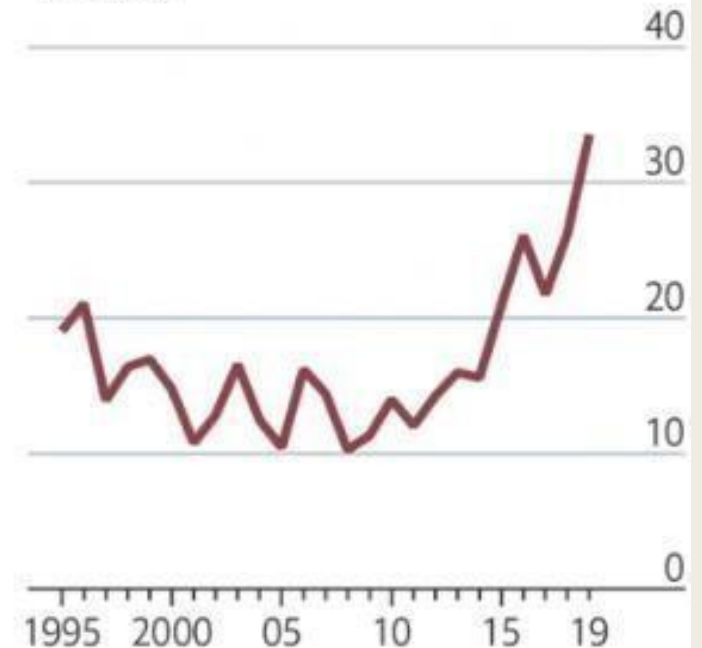
United States and Canada
Rest of the world



Sources: The Numbers; Box Office Mojo

The Economist

United States and Canada,
Disney films, box-office sales
% of total



Source: The Numbers, Box Office Mojo, The Economist



THANK YOU

