



WHAT WE ARE SEEING

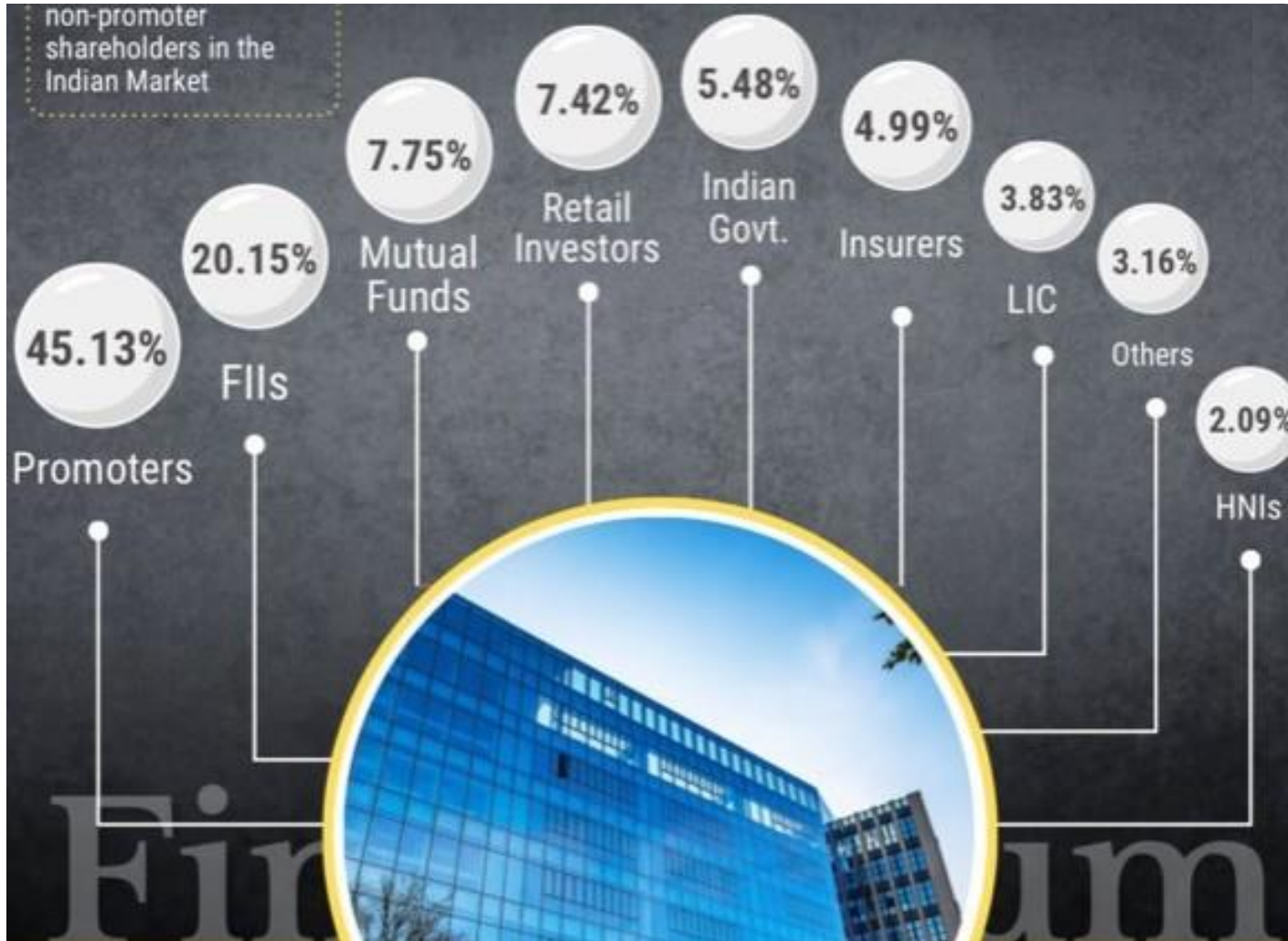
VERSION 1.113

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1 Who owns Indian companies?

FII's remain the largest non-promoter shareholders in the Indian market



2 Best cuisines in the world

India ranks 5th on Taste atlas awards 2022 for world's best cuisines

1	 Italy	4.72	26	 Georgia	4.23
2	 Greece	4.68	27	 Czech Republic	4.21
3	 Spain	4.59	28	 Bulgaria	4.20
4	 Japan	4.59	29	 England	4.18
5	 India	4.54	30	 Thailand	4.16
6	 Mexico	4.53	31	 Belgium	4.14
7	 Turkiye	4.52	32	 Netherlands	4.10
8	 United States	4.51	33	 Austria	4.09
9	 France	4.51	34	 Algeria	4.07
10	 Peru	4.51	35	 Denmark	4.05
11	 China	4.49	36	 South Africa	4.03
12	 Brazil	4.49	37	 Syria	4.03
13	 Portugal	4.47	38	 Bosnia & Herzegovina	3.99
14	 Poland	4.44	39	 Malaysia	3.99
15	 Germany	4.37	40	 Lebanon	3.99
16	 Indonesia	4.37	41	 Ukraine	3.98
17	 Croatia	4.33	42	 Palestine	3.98
18	 Argentina	4.33	43	 Bangladesh	3.97
19	 South Korea	4.31	44	 Lithuania	3.96
20	 Vietnam	4.31	45	 Taiwan	3.96
21	 Hungary	4.26	46	 Paraguay	3.96
22	 Romania	4.25	47	 Pakistan	3.96
23	 Philippines	4.25	48	 Tunisia	3.95
24	 Iran	4.23	49	 Uruguay	3.95
25	 Serbia	4.23	50	 Slovakia	3.94

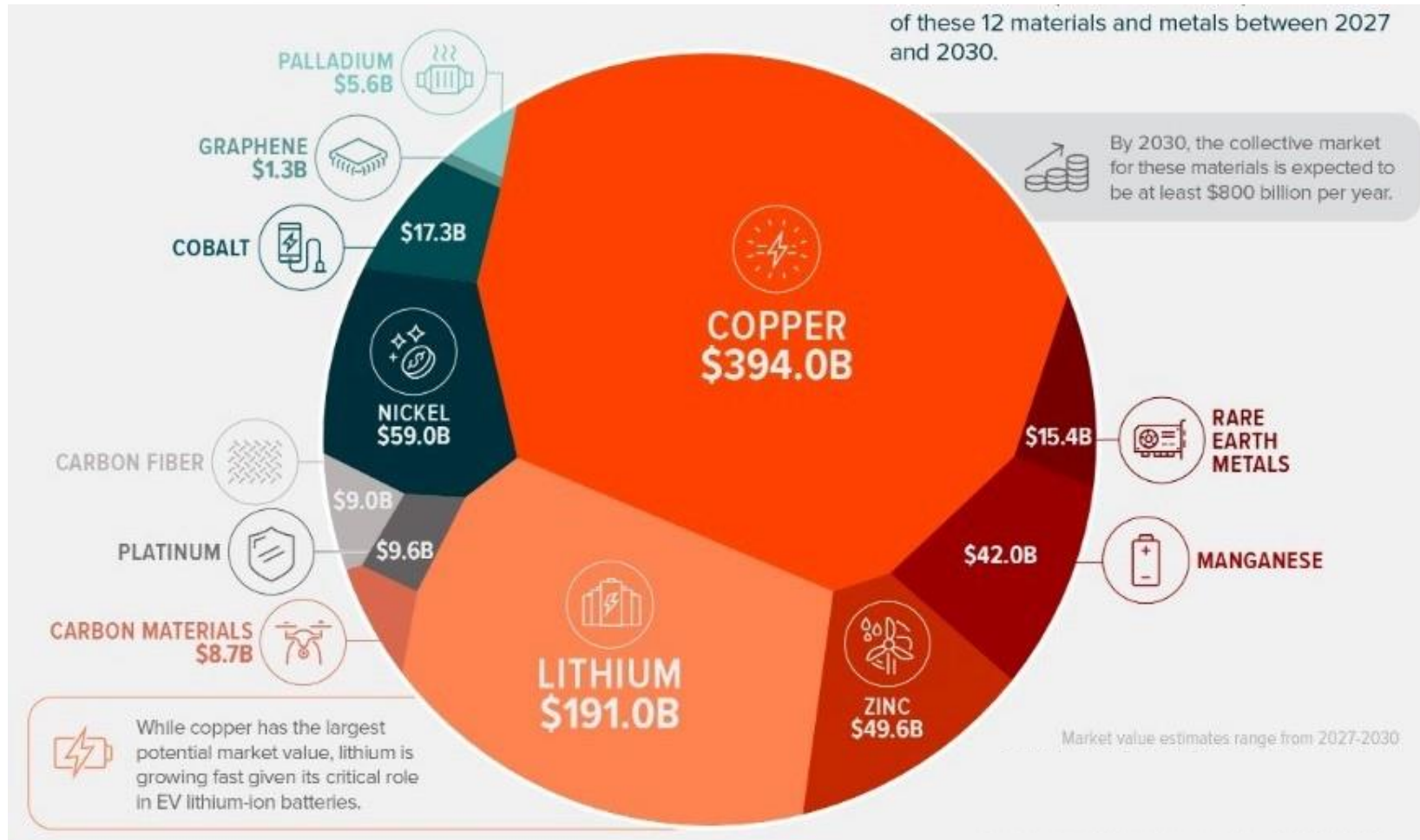
3 State & region wise ATMs in India

States of Maharashtra and Tamil Nadu have the highest number of ATMs in India



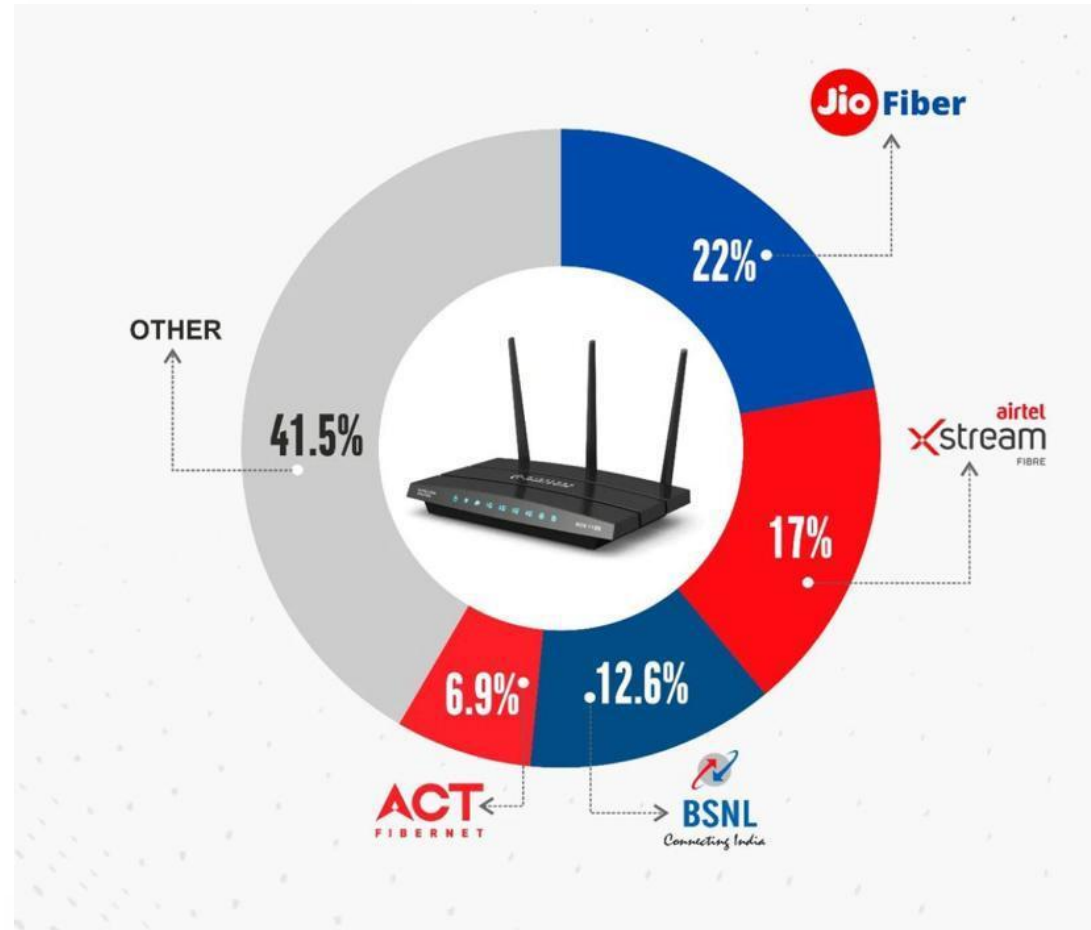
4 The future value of disruptive materials

By 2030, the collective market for these materials is expected to be at least USD 800bn per year



5 Indian fixed broadband market

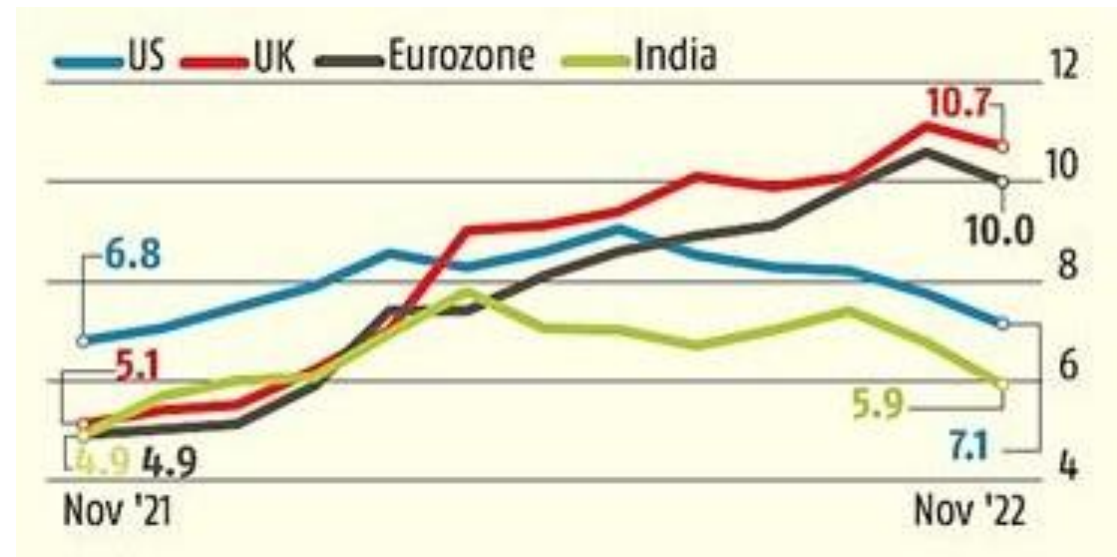
Jio Fiber leads the pack.



Source: Kotak Institutional Equities, Soic.in, Data as of Sept'22

6 Consumer inflation is easing across the world

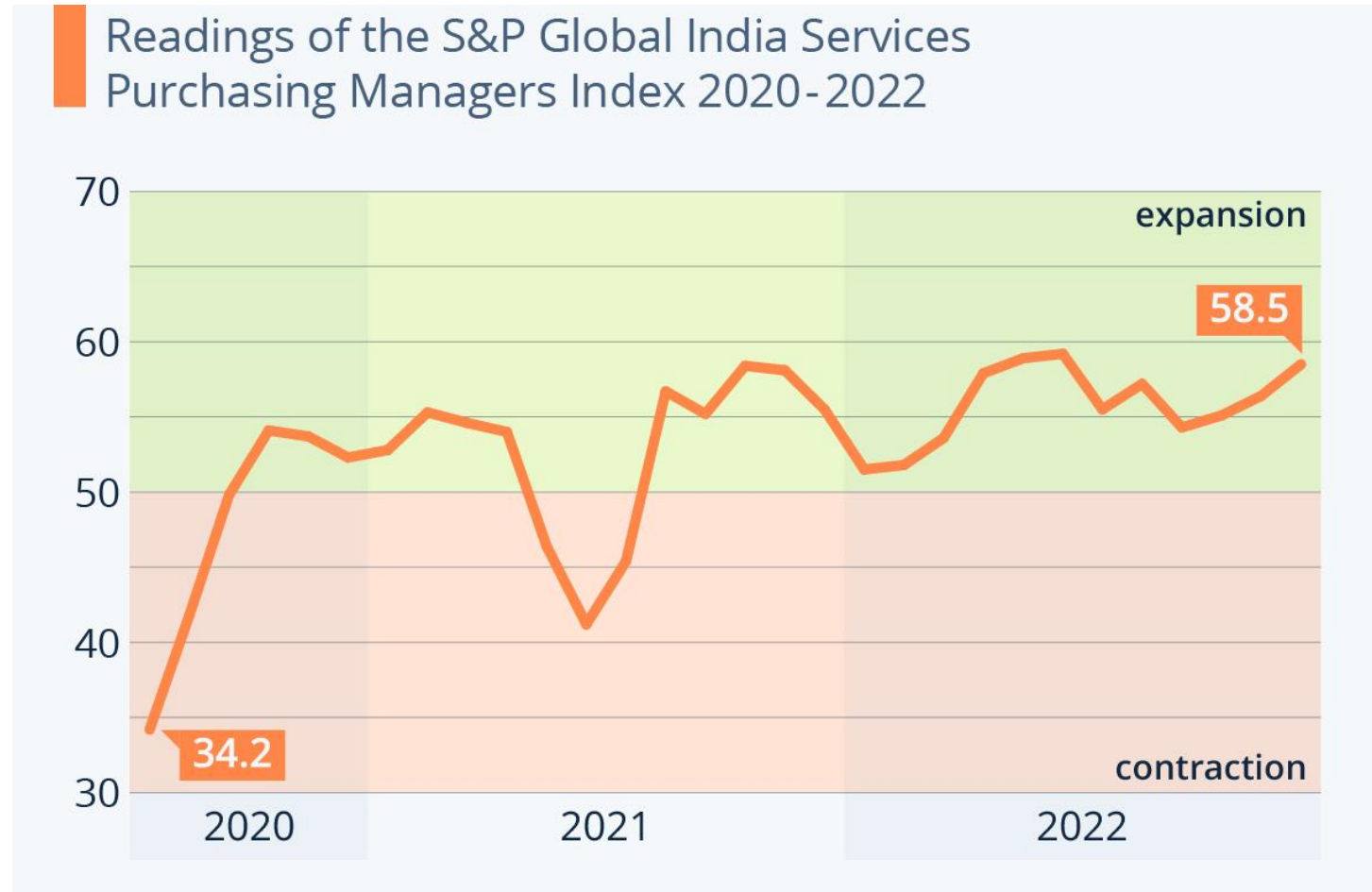
India has seen a sharp improvement in inflation trends



Source: Ycharts, Eurostat, RBI. Data shows consumer price index change in % y/y

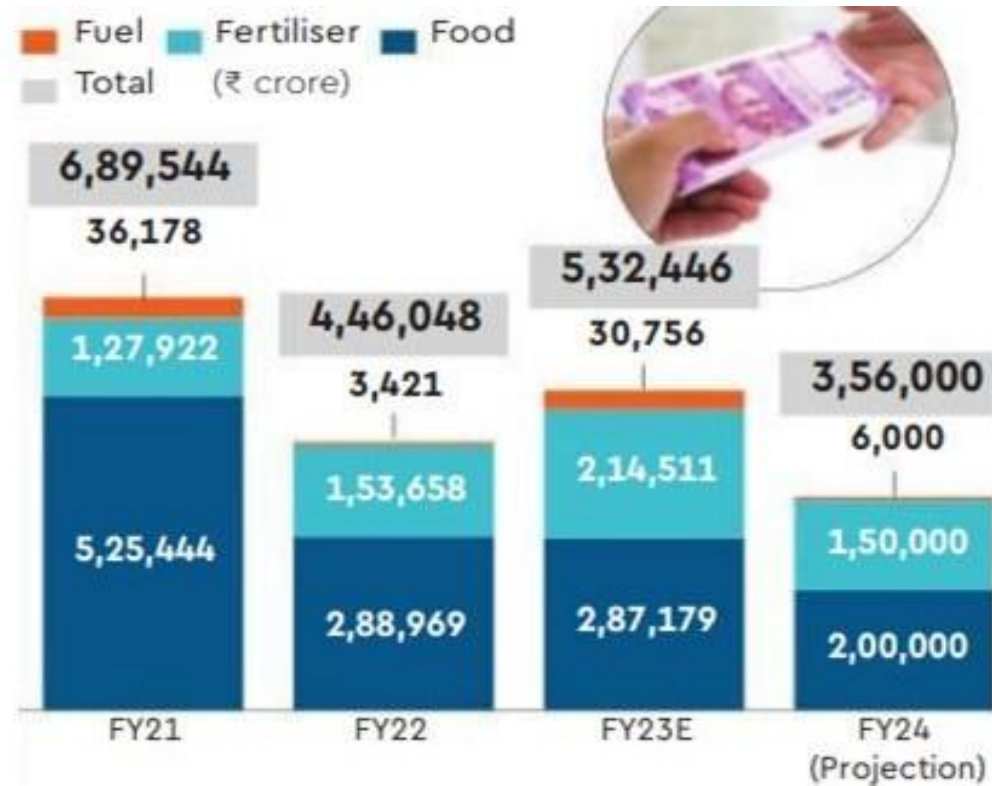
7 Indian services industry shows strong expansion

India's Services PMI climbed to a new six-month high in December, hitting 58.5 points.



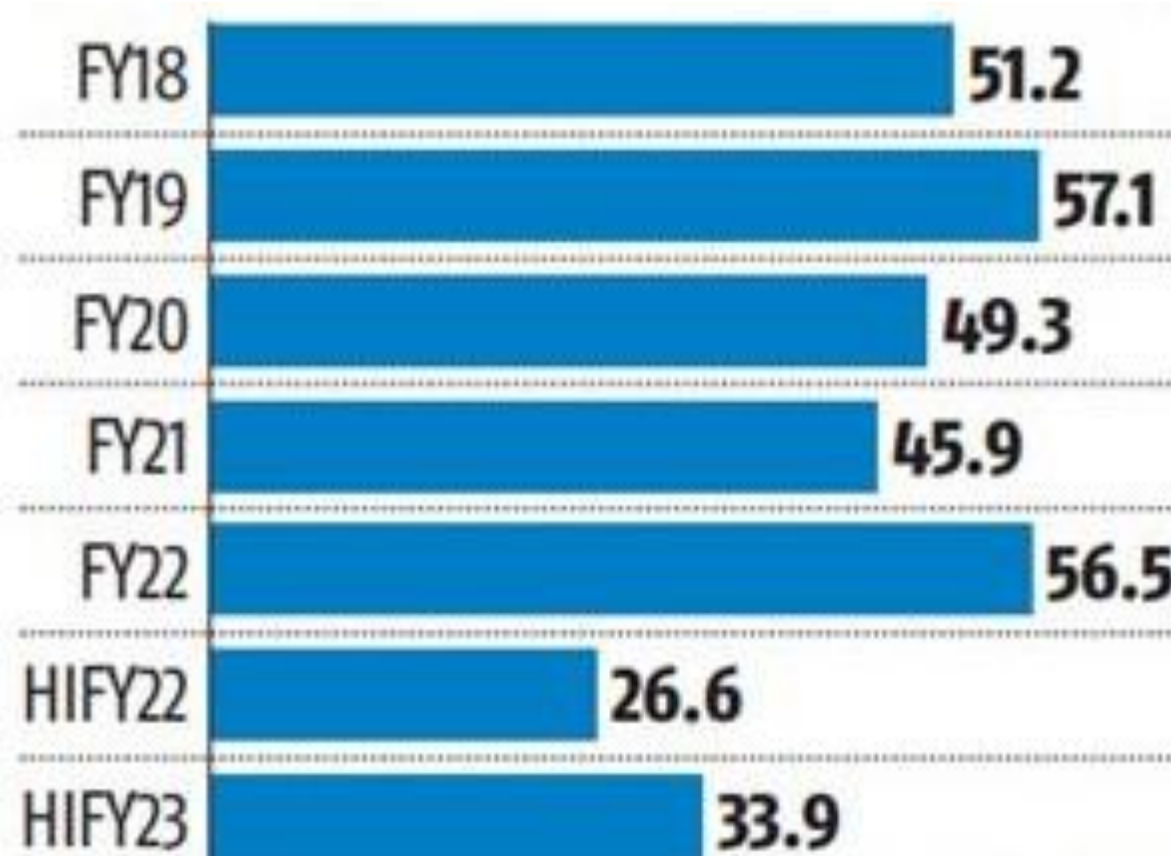
8 Major subsidies expected to fall in FY24

Government's subsidy is expected to decline by 33% in FY24



9 Picking up speed

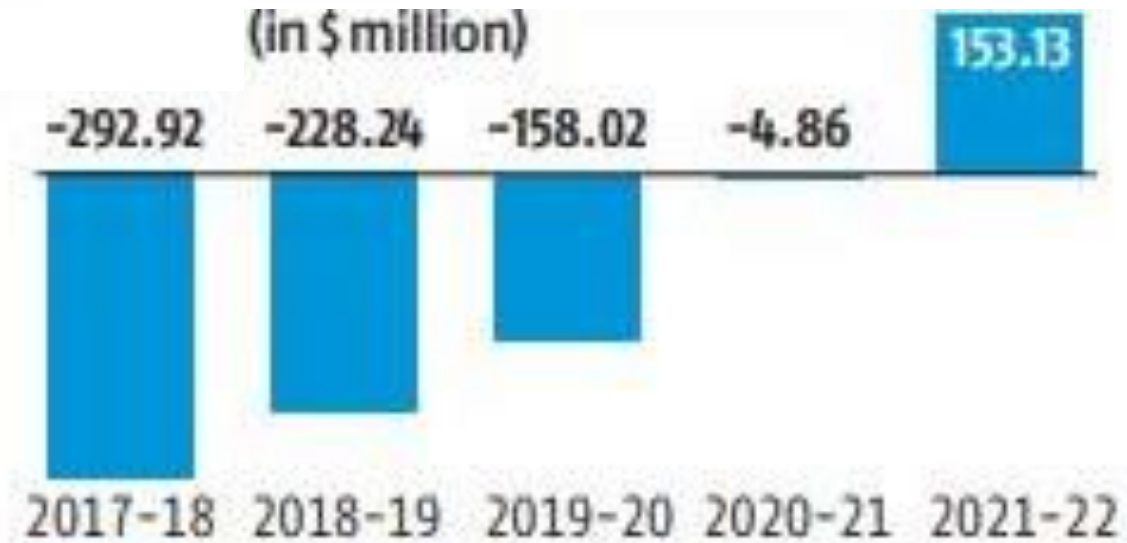
Size of components supplied to passenger car OEM in India has increased by 27% y/y in 1HFY23 on the back of market shift to bigger and costlier cars



Source: ACMA, Business Standard. Data indicates size of component industry in US\$ bn.

10 India now a net exporter of toys

India's toy exports have grown at ~25% CAGR over 2012-2021



Source: Ministry of Commerce and Industry. Net trade=Exports-imports, Data in USD million

THANK YOU



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