



WHAT WE ARE SEEING

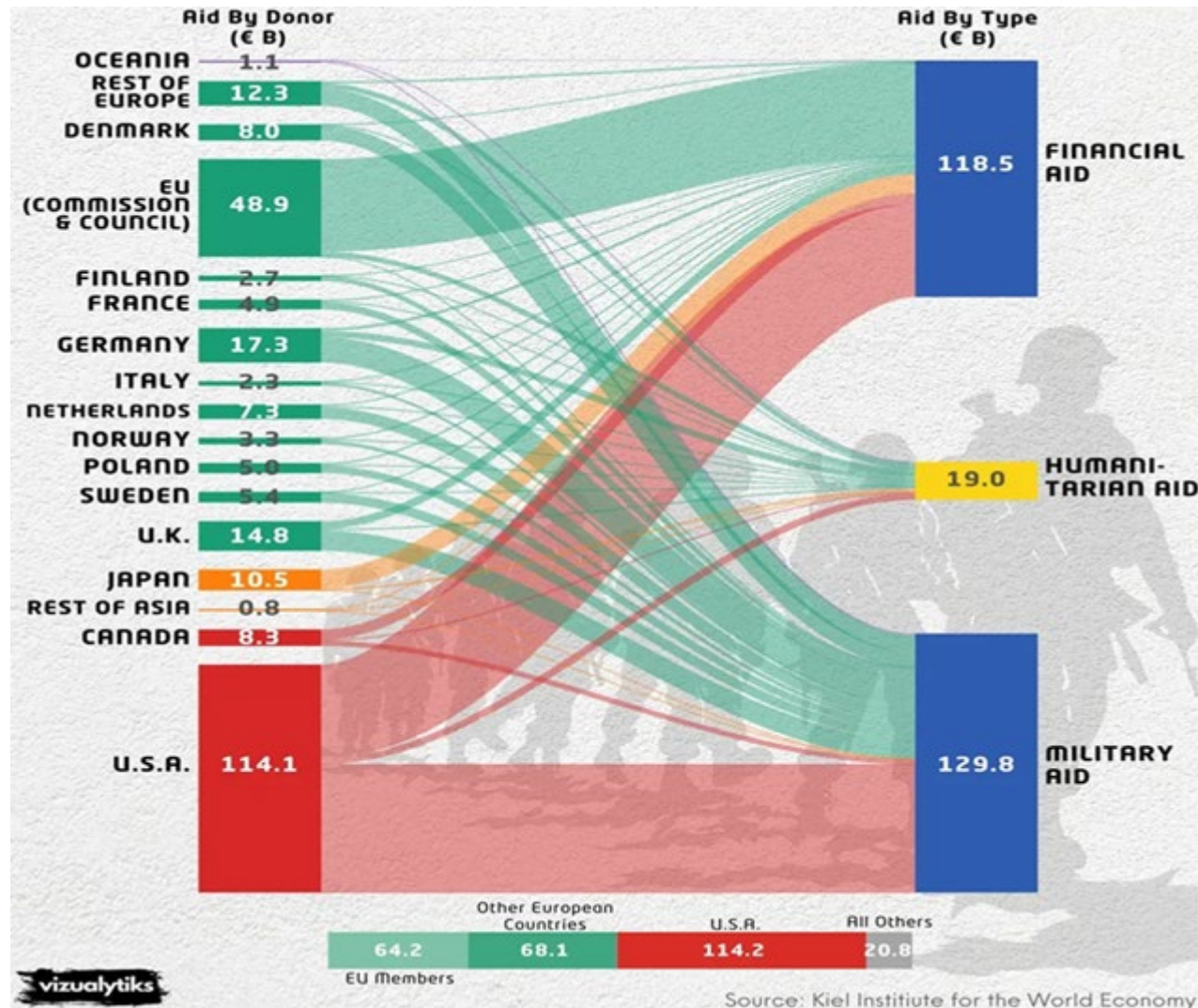
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USA contributed the most in funding Ukraine war efforts

A total of Euro 267Bn were allocated between Feb '22 to Dec '24 as aid by countries to support Ukraine's war efforts



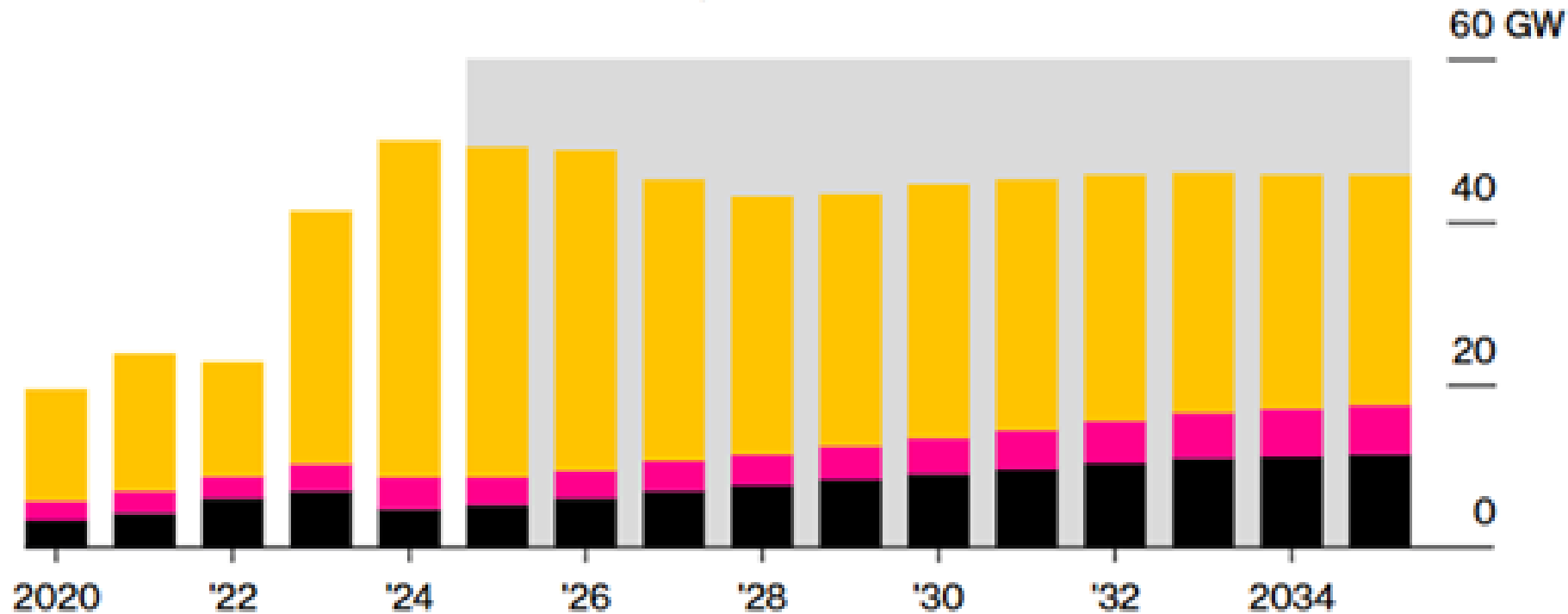
2 US is set to add about 500GW of solar capacity by 2035

Future of IRA and other policy measure like high import duty on imports of solar panels will play a key role in 'Make in America'

US Solar Installations

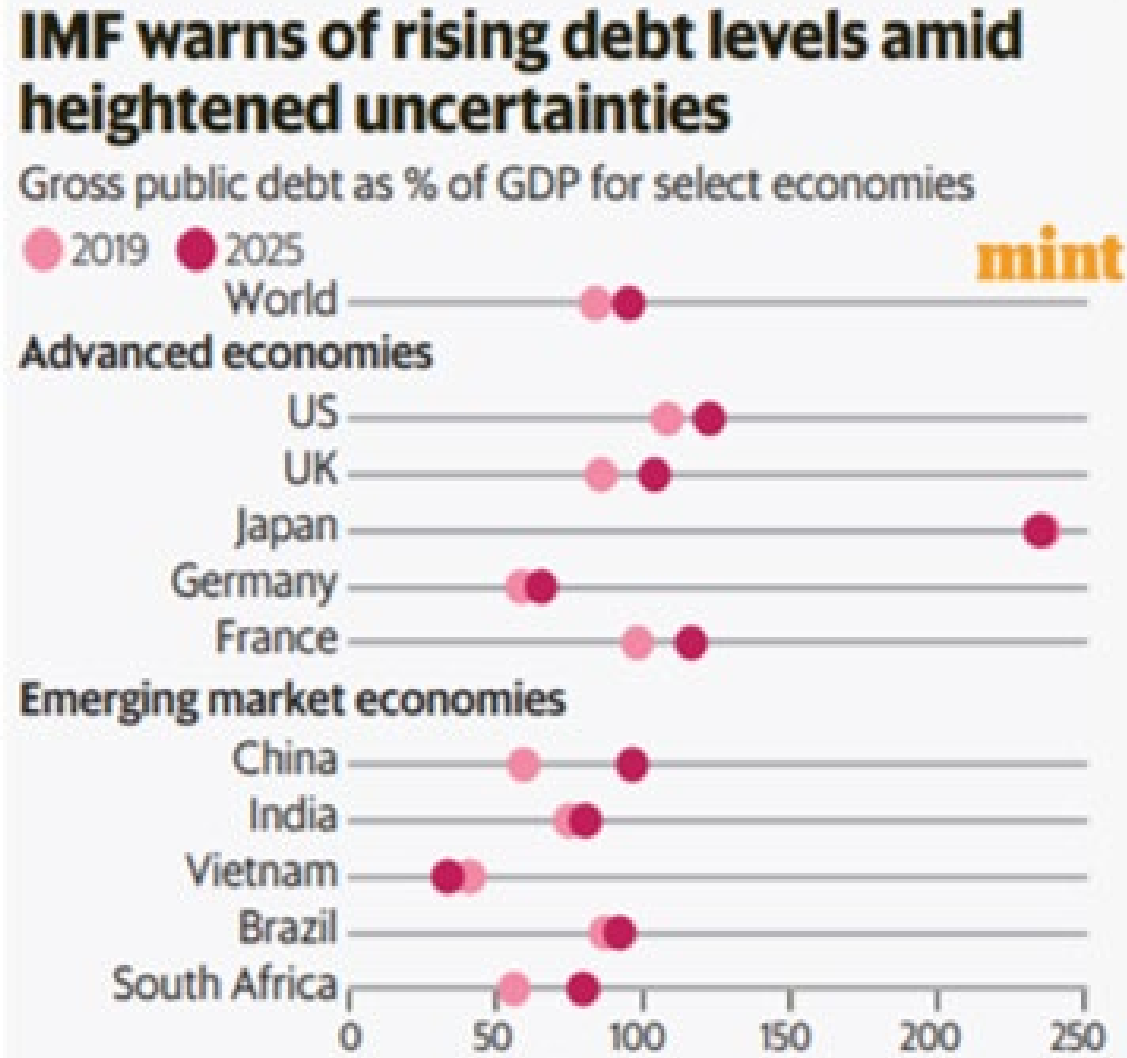
Average yearly additions to average over 40 gigawatts

■ Residential ■ Non-residential ■ Utility-scale ■ Forecast



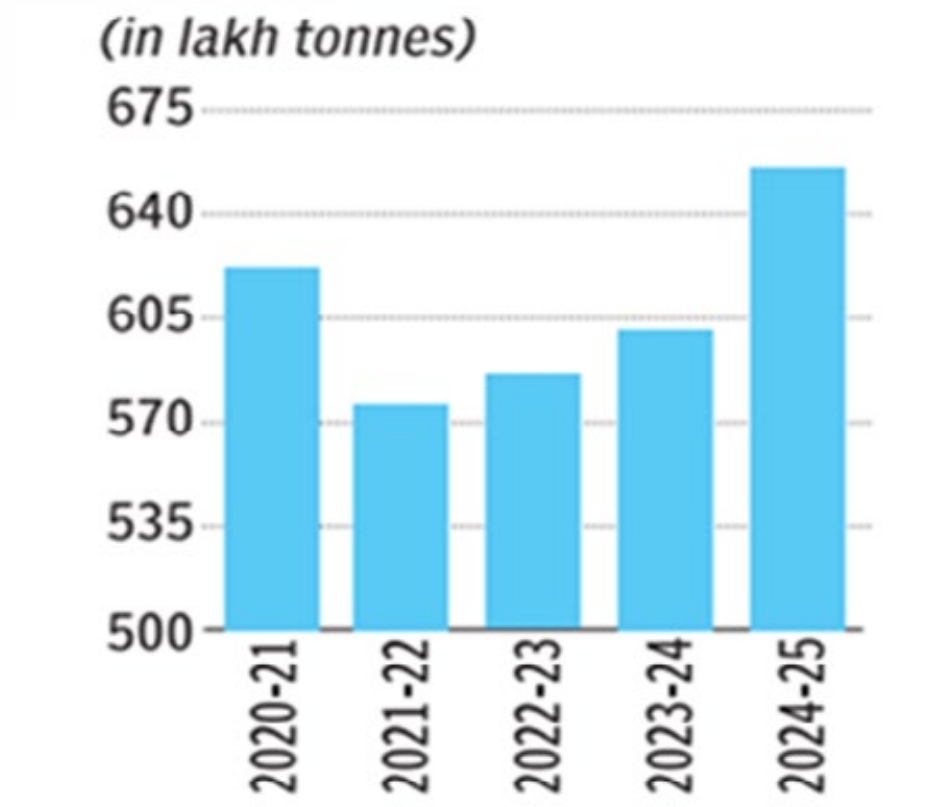
3 Rising Global debt requires countries to put their fiscal house in order

Global public debt to increase by 2.8% in CY25 while debt for countries like US and China could rise to 122% and 96% of GDP



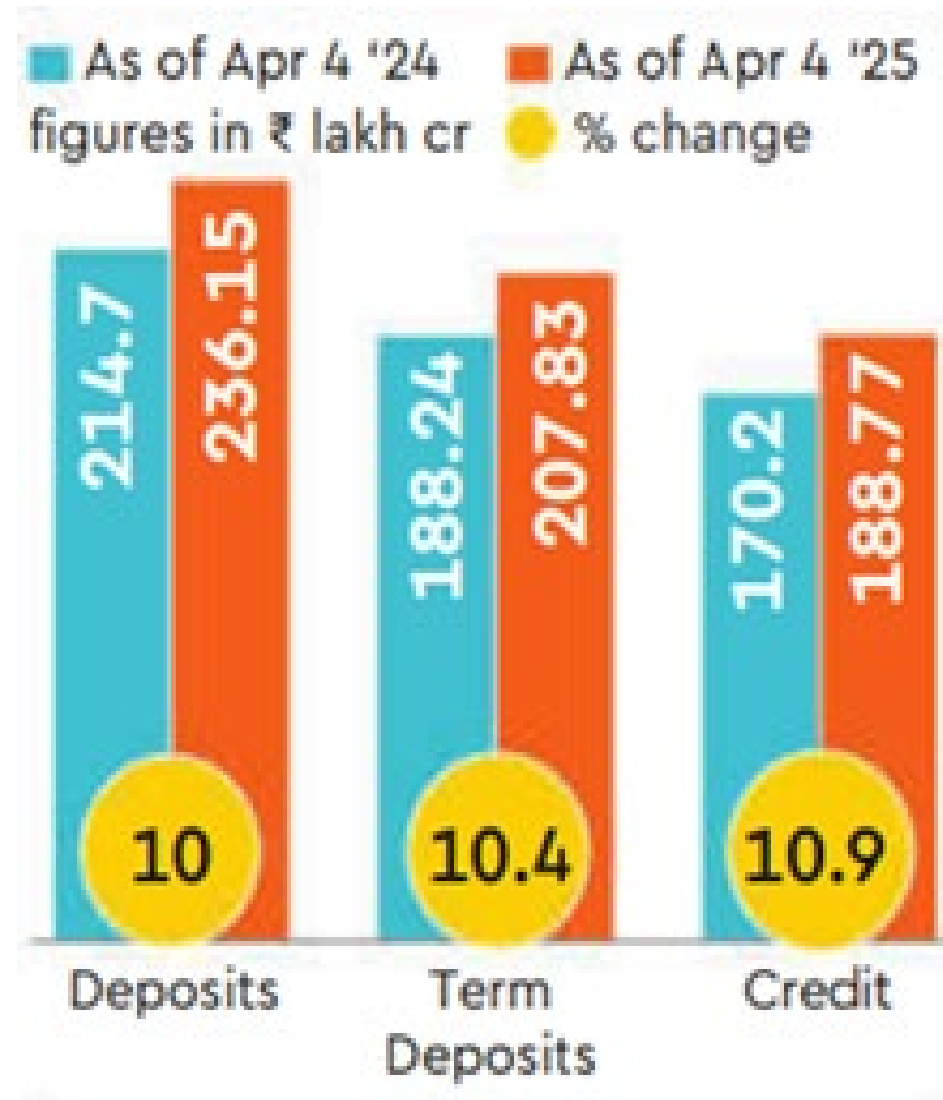
4 Indian fertilizers sales at a 5-year high

Urea sales grew by 8.4% while Potash and complex nutrients grew by 34/28% in FY25



5 Deposit growth continues to lag credit growth in India

Banks struggle for deposit mobilization is likely to continue in FY26 as RBI expected to cut rates in the current financial year



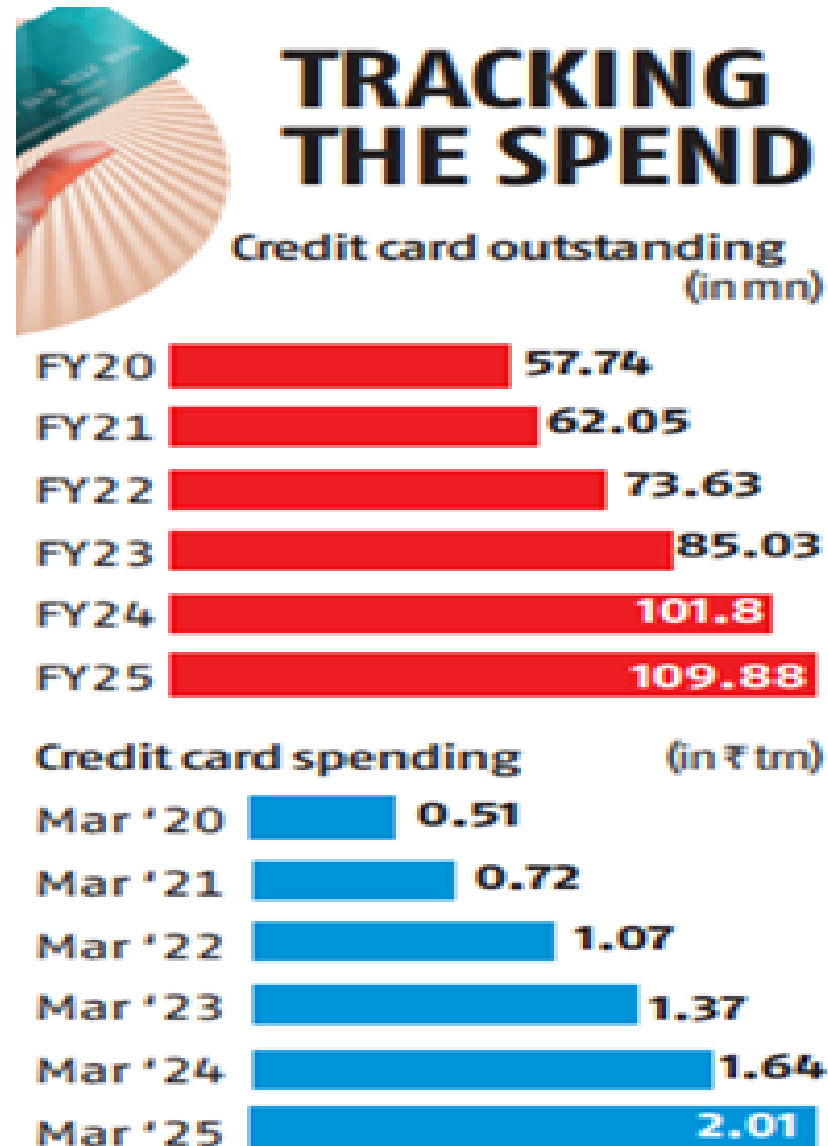
6 TN & Karnataka contributed ~2/3rd of electronic exports from India

Tamil Nadu (TN) is the fastest growing state in Indian electronic exports while its share increased from 32% in FY24 to 41.2% in FY25

States	FY25 electronics exports (\$ billion)	Share in India's electronics exports (%)
Tamil Nadu	14.6	41.2
Karnataka	7.8	22.1
Uttar Pradesh	5.2	14.8
Maharashtra	3.5	9.9
Gujarat	1.8	5.2

7 Outstanding credit cards in India almost doubled in last 5 years

Credit card spends surged to a four-month high of ₹2.01 trillion in March 2025, highest spends in the month of March over last 5 years



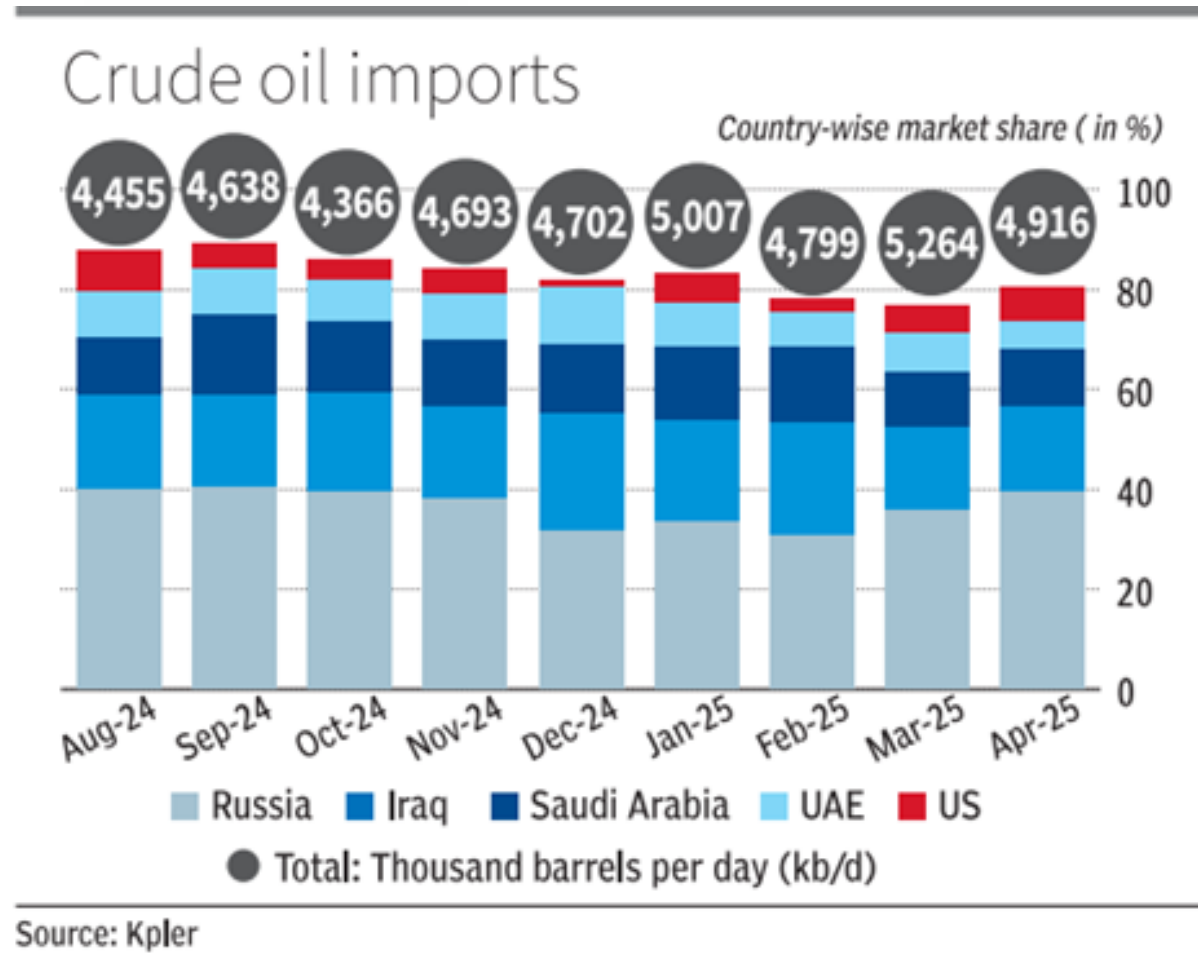
8 Households demanding work under MGNREGA contracts in Apr '25

Despite April being a strong month as the major sowing season is over and agriculture activities are limited, MGNREGA demand was down 6.6%



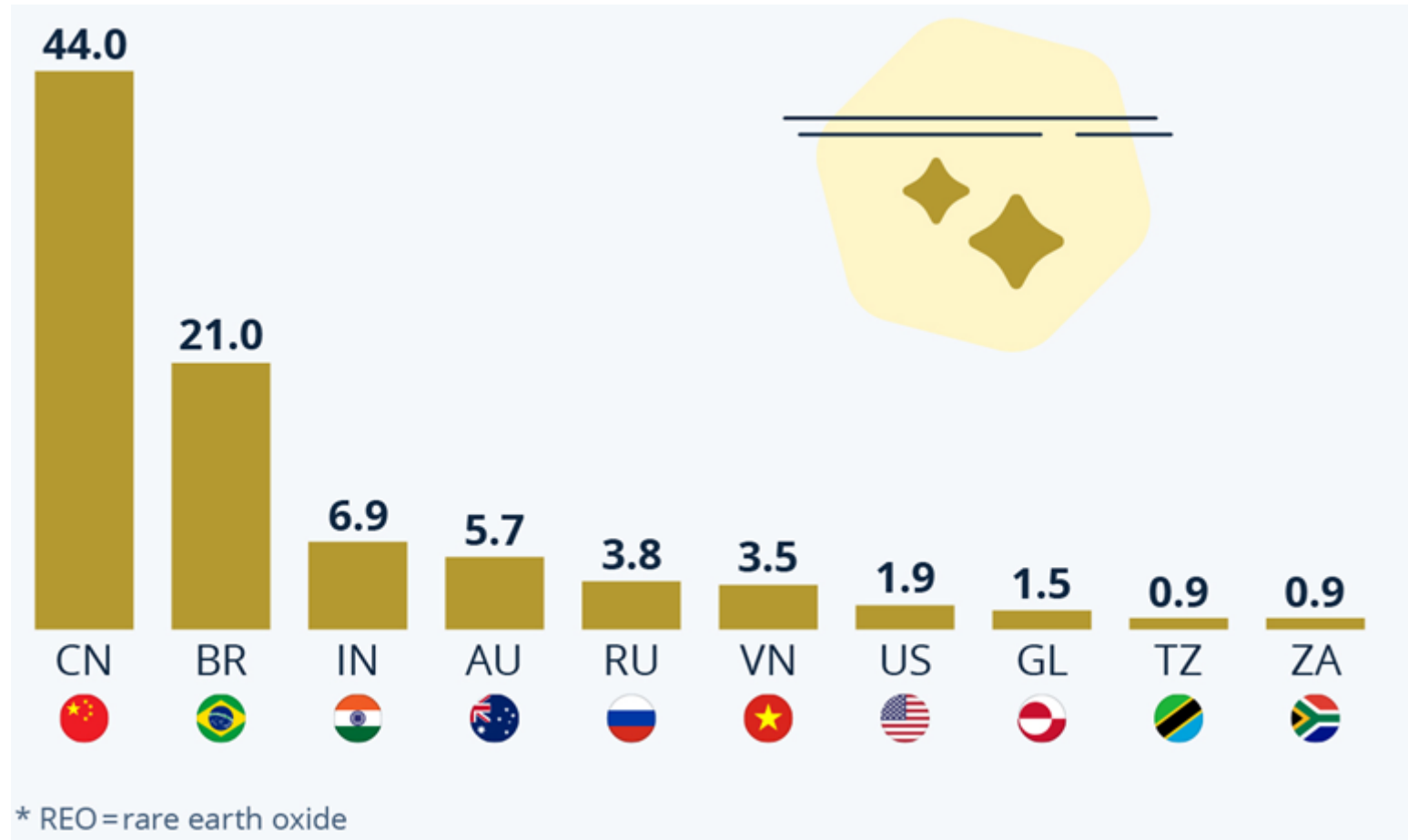
9 Russia regains its lost market share of crude oil imports in India

Russian shipments into India during April 2025 rose to a 10-month high inching close to 40% market share



10 China undisputed global leader in world's rare earth reserves

Of the total 90mt of global reserves of rare earth oxides, US just has ~2mt of rare earth and is highly dependent on China for imports





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THANK YOU

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