



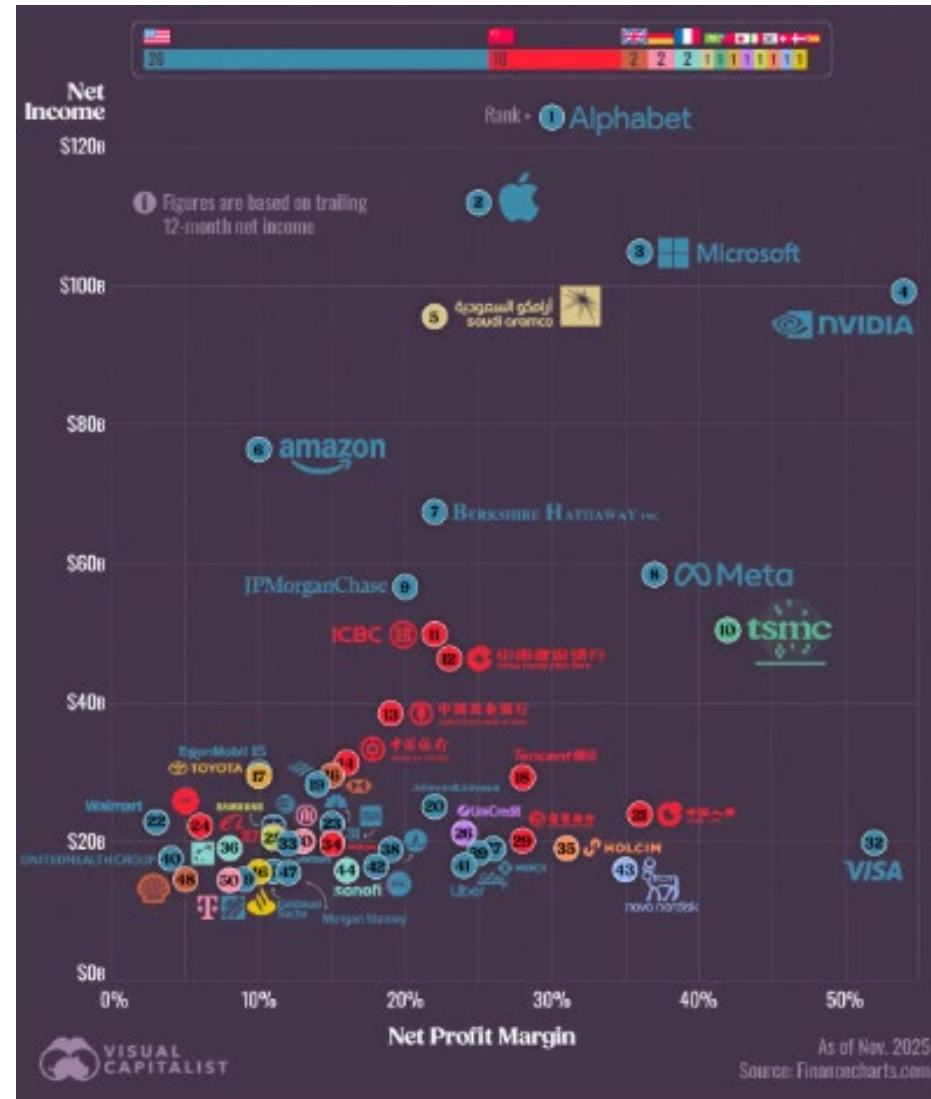
WHAT WE ARE SEEING

VERSION 1.189
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1 The World's Most Profitable Companies in 2025

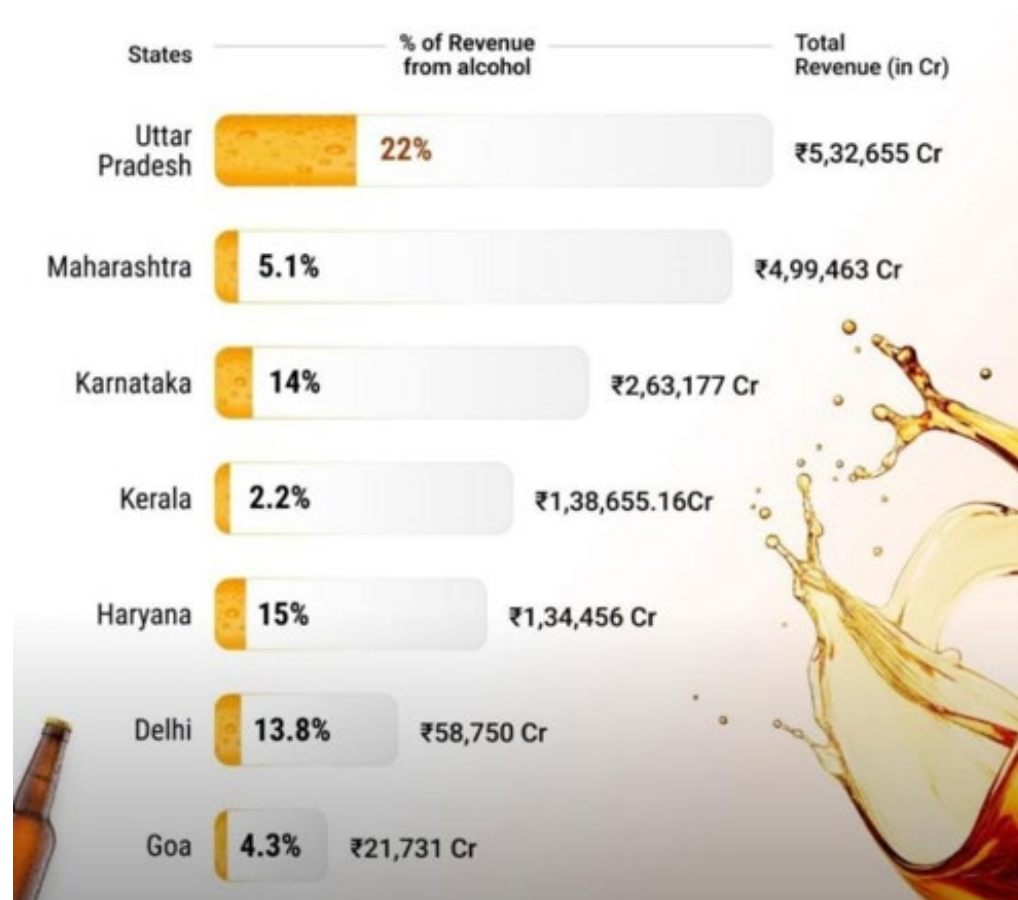
NVIDIA stands out with a remarkable 53.7% profit margin



Source: Financialcharts.com

2 State wise Alcohol revenue

Uttar Pradesh earns the most from Alcohol

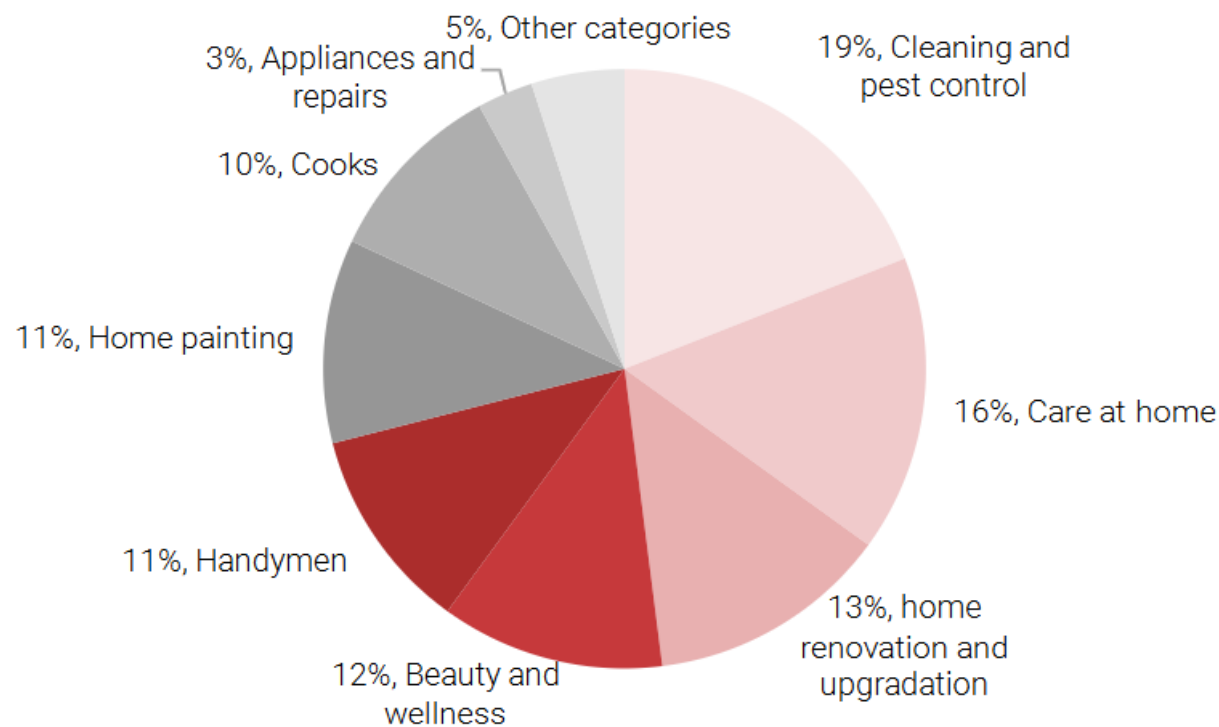


Source: Annual financial statement for different states

3 Home service industry in India

About 45% of the home services market consists of cleaning, beauty, renovation and repairs

Exhibit 11: Breakdown of India home services market by service categories, March fiscal year-end, 2025



Source: Redseer, Company, Kotak Institutional Equities

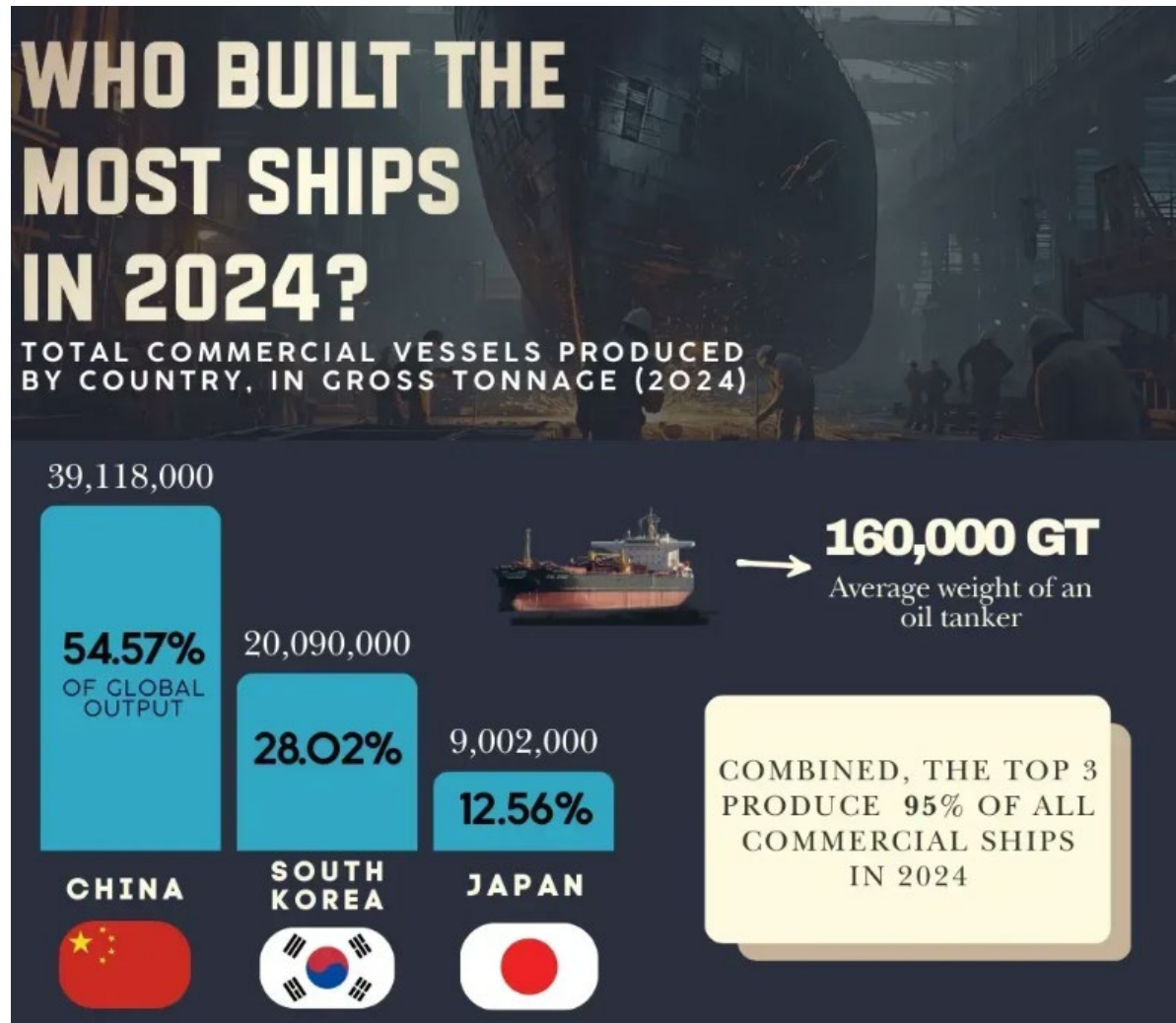
4 Gold Accumulation

China, India, Poland and Turkey saw major increases from 2019 to 2024



5 Three nations control the global fleet

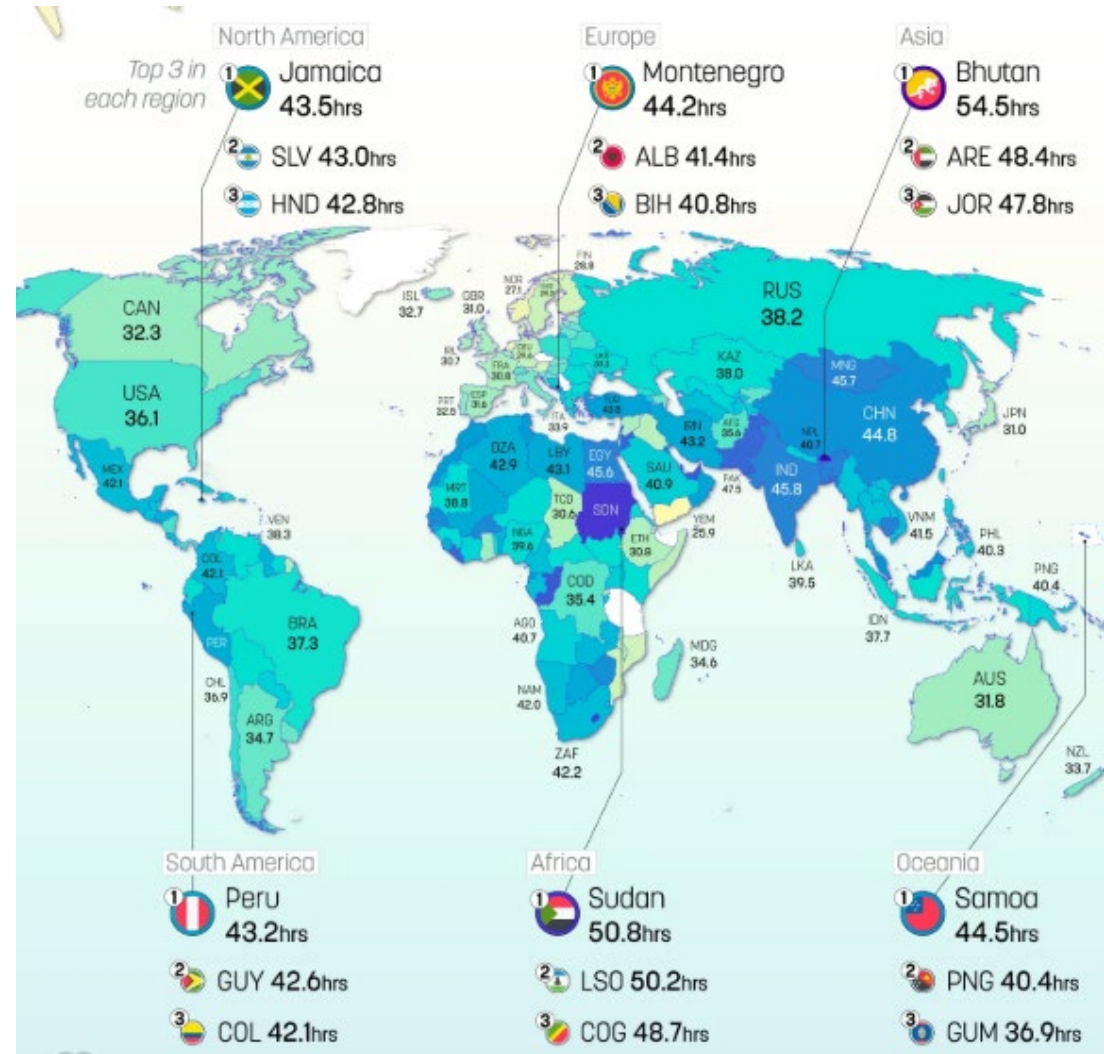
China, South Korea and Japan together accounted for a staggering 95% of global commercial ship output



Source: UNCTAD, Visual Capitalist

6 The World's Hardest working countries

Bhutan stands out as the world's hardest-working nation, with employees clocking an average of 54.5 hours per week while Indians work 45.8 hours per week.



Source: International labour organization (ILO) and OECD.

7 Water Purification Habits

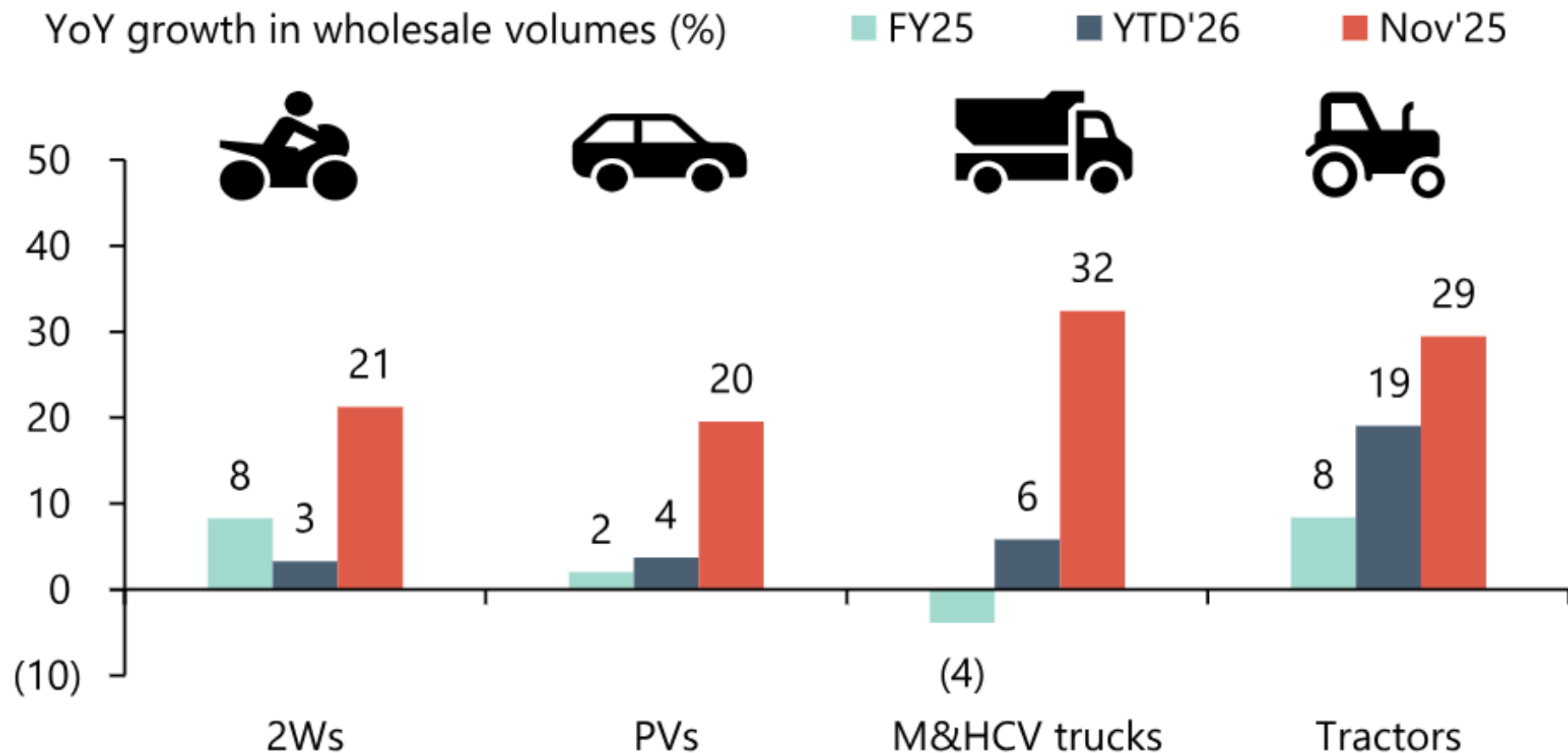
Surprisingly only 8% urban household use electric water purifiers



Source: TGI 2024 (IMRB)

8 India Autos

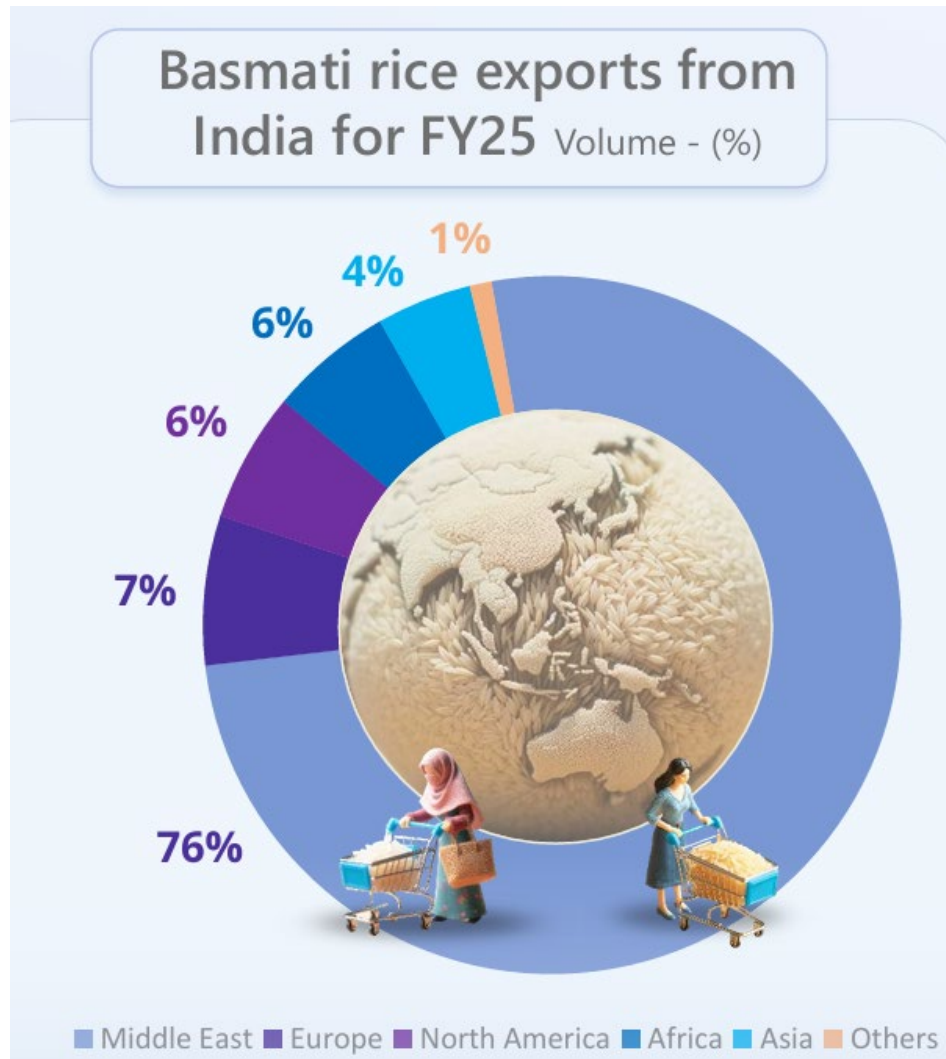
Strong double digit wholesale growth across segments in Nov 2025



Source: CMIE, Company data, Jefferies estimates. Nov data based on OEM reported data

9 Rice export from India

Middle east accounts for nearly 3/4th India's basmati exports



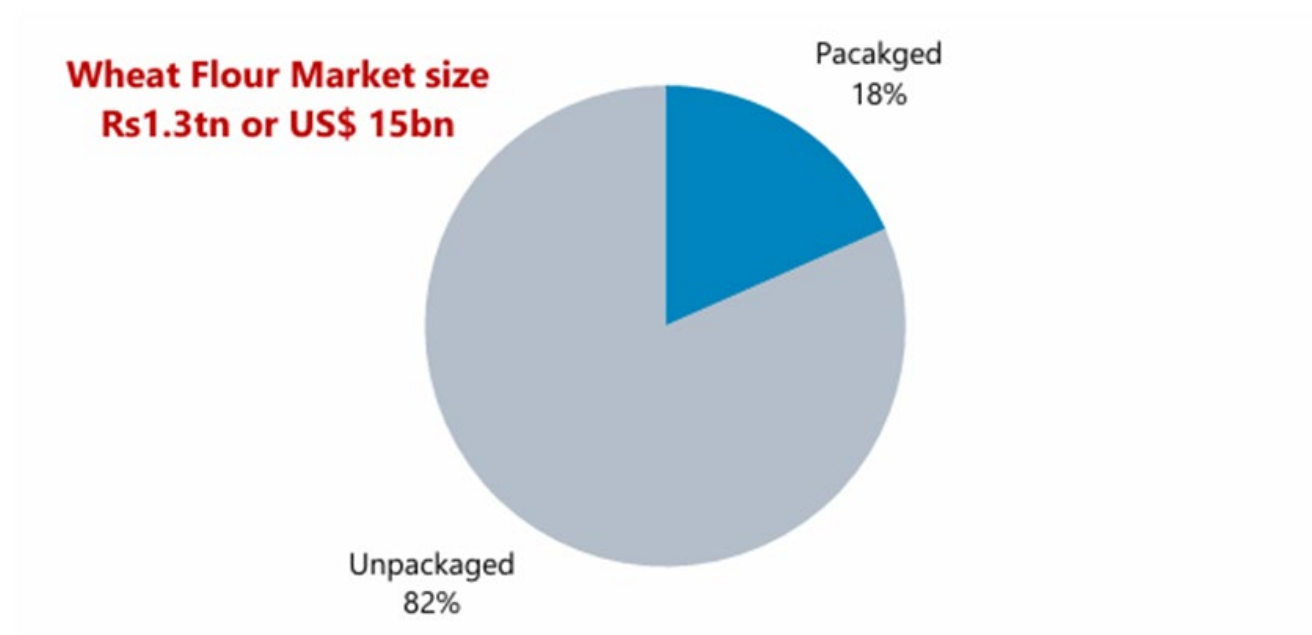
Source: KRBL Company data

10 What Flour market

Only 18% wheat flour is sold in packaged form

Exhibit 78 - Wheat flour is a large Rs1.3tn market, albeit <20% of this is sold in packaged form

Wheat flour market - Packaged vs. unpackaged



Source: Technopak, Jefferies



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