$3 TRILLION OPPORTUNITY FOR INDIA IN INDUSTRY SECTOR BY 2035
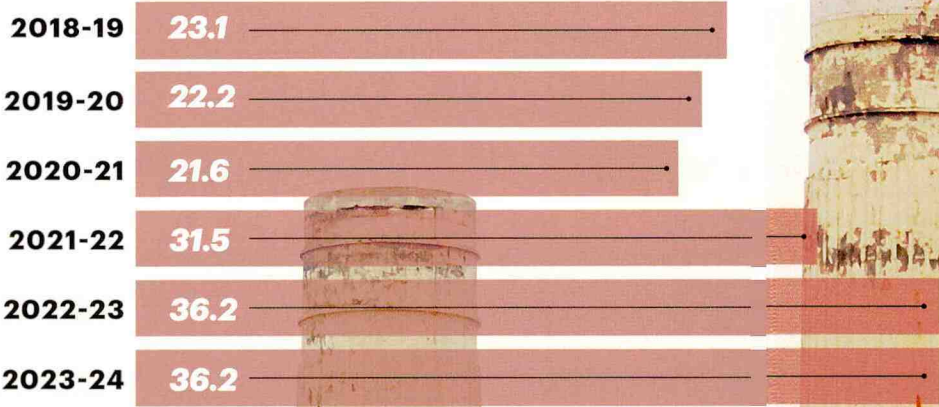
While in the last 5 years industrial sector growth was led by Construction which was driven by significant investments in the infrastructure, manufacturing is expected to emerge as the growth leader taking 2/3 share of Industrials and more than 20% share of the GDP by 2035. Higher domestic consumption with increasing per capita income and a target of US$ 1 trillion merchandise exports are expected to drive this growth.
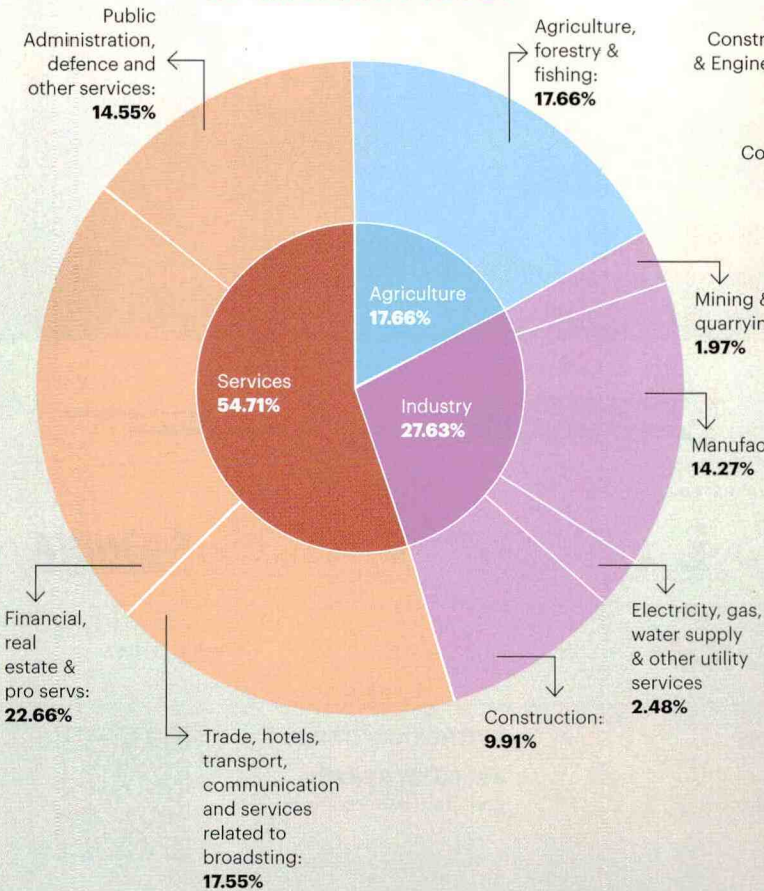
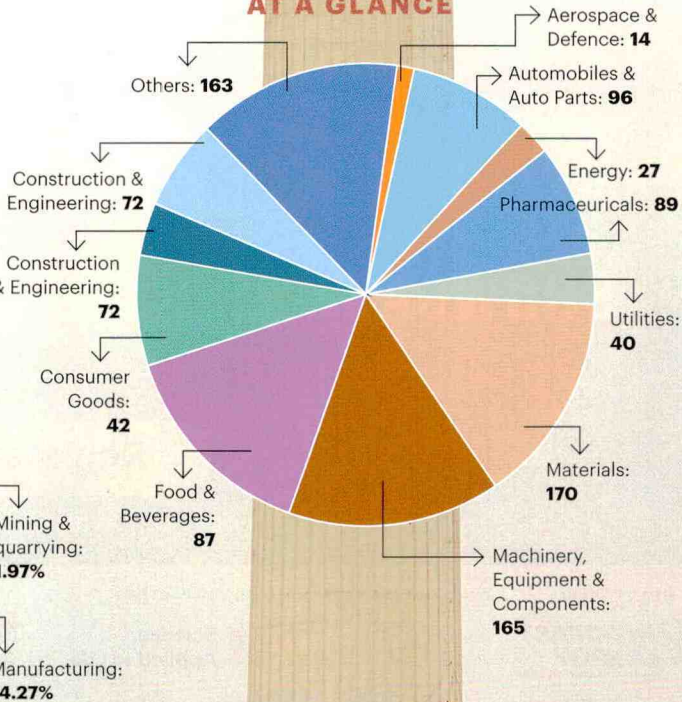## INDIA'S MERCHANDISE EXPORTS FROM FY19 TO FY24

(Rs. Trillion)

Year	Value
2018-19	23.1
2019-20	22.2
2020-21	21.6
2021-22	31.5
2022-23	36.2
2023-24	36.2

NO OF COMPANIES AND MCAP OF MAJOR CLASSIFICATIONS IN INDUSTRY SECTOR AS OF 25TH APR 2025

Classification (Mcap 5000 Mn+)	# Companies	Mcap (Rs Mn)	% of Mcap
Materials	170	3,24,79,312	14%
Energy	27	2,92,77,333	12%
Automobiles & Auto Parts	96	2,68,11,108	11%
Pharmaceuticals	89	2,16,59,589	9%
Utilities	40	2,15,43,520	9%
Machinery, Equipment & Components	165	2,13,52,651	9%
Others	163	1,91,02,485	8%
Food & Beverages	87	1,86,59,312	8%
Chemicals	167	1,84,77,584	8%
Consumer Goods	42	1,25,12,340	5%
Construction & Engineering	72	94,56,016	4%
Aerospace & Defence	14	73,75,840	3%

INDUSTRY ECOSYSTEM - AT A GLANCE

- Aerospace & Defence: **14**
- Automobiles & Auto Parts: **96**
- Energy: **27**
- Pharmaceuticals: **89**
- Utilities: **40**
- Materials: **170**
- Machinery, Equipment & Components: **165**
- Food & Beverages: **87**
- Consumer Goods: **42**
- Construction & Engineering: **72**
- Others: **163**

CURRENT AND FORWARD VALUATIONS OF THE ECOSYSTEM

Classification	PE Median	2-yr Fwd PE Median	5-yr Sales CAGR Median	2-yr Fwd Growth Median
Construction & Engineering	26.5	18.1	12.4%	16%
Utilities	25.4	17.2	11.5%	14.6%
Others	27.9	22.5	9.3%	17%
Materials	27.2	19.1	10.4%	14.2%
Energy	19.7	12.0	9.5%	6.2%
Machinery, Equip. & Comp.	44.3	31.6	12.9%	16.6%
Automobiles & Auto Parts	28.8	24.0	10.5%	12.3%
Aerospace & Defence	62.1	40.4	16%	21.8%
Chemicals	29.0	29.2	11.7%	13.2%
Pharmaceuticals	33.5	28.5	9.2%	12.1%
Food & Beverages	31.0	26.6	8.3%	12.4%
Consumer Goods	47.9	32.6	6.8%	11%
Total Industry	**32.0**	**25.8**	**10.3%**	**13.9%**

SECTOR-WISE GDP BREAK-UP OF INDIA IN FY2024

- Public Administration, defence and other services: **14.55%**
- Agriculture, forestry & fishing: **17.66%**
- Agriculture **17.66%**
- Services **54.71%**
- Industry **27.63%**
- Mining & quarrying: **1.97%**
- Manufacturing: **14.27%**
- Electricity, gas, water supply & other utility services **2.48%**
- Construction: **9.91%**
- Trade, hotels, transport, communication and services related to broadsting: **17.55%**
- Financial, real estate & pro servs: **22.66%**

Source: Omniscience Capital

OMNI MANUFACTURING MAGNATES PORTFOLIO

%	Category
5%	MANUFACTURING SUPPORT
6%	DEFENCE MANUFACTURING
21%	RAILWAY MANUFACTURING
16%	FINANCING OF MANUFACTURING
5%	DIVERSIFIED MANUFACTURING
21%	CONSTRUCTION & ENGINEERING
16%	POWER MANUFACTURING
10%	MANUFACTURING MATTERIALS