



Invest in the Future: AI, EVs, Semiconductors & More

The Big Question from Investors

A common query among savvy investors today is: *“Are there investment opportunities to benefit from the global growth story of Artificial Intelligence, Electric Vehicles, Semiconductors, Data Centers, and Global Capability Centers?”*

In India, while a few indices and funds touch upon these themes, they do not fully capture the potential. The scarcity of listed companies in India in these spaces means investors cannot truly benefit from the essence of these global growth stories by staying confined to domestic markets.

Global Leaders Driving the New Age Economy

Artificial Intelligence & Data Centers

Global tech giants are making record-breaking investments in AI.

Over **\$4 trillion** is expected to be invested in AI over the next five years.

In 2025 alone, big tech spending on AI-driven data centers is staggering:

- Microsoft: \$108 billion
- Amazon: \$88 billion
- Alphabet (Google): \$85 billion
- Meta: \$72 billion

China is also racing ahead, with Alibaba, Deepseek, Hygon, and Cambricon building a strong AI ecosystem, supported by government-backed R&D subsidies.

Electric Vehicles (EVs)

- Tesla and BYD are the undisputed leaders in the global EV race.
- BYD overtook Tesla in sales during the first half of 2025, delivering **1.89 million plug-in vehicles**, up 33% year-on-year.
- Tesla is gearing for mass adoption with an affordable EV model (codename *Redwood*), priced around **\$25,000**.

- BYD is innovating with advanced batteries and features like Vehicle-to-Load (V2L) and rotating displays in its new Sealion 7 model.

Semiconductors & Emerging Tech

AI chips are the backbone of future innovation.

Chinese firms like Cambricon Technologies and Hygon are positioning themselves as “little Nvidias,” aiming for dominance in AI chip design.

These technologies are not confined to core tech but are disrupting :

- Entertainment
- Healthcare
- Education
- Gaming
- E-commerce

Investment Opportunities for You

While India is an emerging hub for technology services, the global giants spearheading next-generation innovations are largely based in the **US and China**. To truly participate in this growth story, investors need exposure beyond domestic markets.

We have identified carefully chosen **international funds** and **global themes** that allow investors to:

- Gain exposure to AI, EVs, Semiconductors, Data Centers, and emerging technologies.
- Tap into the capital expenditure wave of trillion-dollar tech giants.
- Ride the disruption happening across industries worldwide.

Your Next Step

Don't miss out on the wave of technological transformation shaping the future of business and society.

Contact us today to invest in these winning themes.

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