Twitter Thread by Sanjay Dutt

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3 sectors (kind of recession proof) come to mind as potential multi baggers next 5-7 yrs. Low sector mkt cap/total listed cap & obvious low GVA to total GVA of listed cos -

1. Healthcare (hospitals/diagnostics etc)
2. Liquour/Alchohol
3. Real estate

Even global comps are stark

These have reasonable strong entry barriers also. It's not easy cresting liquor brands, reputed real estate companies and similarly top quality hospitals and diagnostic networks.

I must add another one that has huge upside here in India with entry barriers and brand creation barriers - Media/Entertainment..