

Twitter Thread by Sanjay Dutt

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@thesanjaydutt



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/Alcohol**
- 3. Real estate**

Even global comps are stark

These have reasonable strong entry barriers also. It's not easy creating 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..