

1. Technology (Semiconductors, AI, Cloud & Software)

- **Growth drivers:** Explosive demand for AI chips, cloud infrastructure build-out, and digital transformation across industries.
 - **Key players:** NVIDIA, TSMC, Microsoft, Google, AWS, Intel.
 - **Recent trends:** Generative AI boom, advanced chip manufacturing leaps (3 nm), edge computing growth.
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2. Automotive (EVs, Autonomous Driving, Global Supply Chains)

- **Growth drivers:** Electrification mandates, falling battery costs, autonomous tech development.
 - **Key players:** Tesla, BYD, Volkswagen Group, Toyota, GM.
 - **Recent trends:** EV adoption surging in China and Europe; supply-chain diversification; growing investments in self-driving.
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3. Energy (Renewables, Oil & Gas, Infrastructure)

- **Growth drivers:** Climate policies, cost declines in solar/wind, and global energy demand resilience.
 - **Key players:** NextEra, Vestas, TotalEnergies, Saudi Aramco, Shell, Enel.
 - **Recent trends:** Major renewables build-out, green hydrogen pilots, CapEx rebalancing in oil majors.
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4. Cargo & Logistics (Shipping, Air Freight, Supply Chain Tech)

- **Growth drivers:** E-commerce explosion, “reshoring” of manufacturing, digital logistics.
- **Key players:** DHL, Maersk, UPS, FedEx, COSCO.
- **Recent trends:** Smart-warehouse automation, green shipping push, AI-driven route optimization.