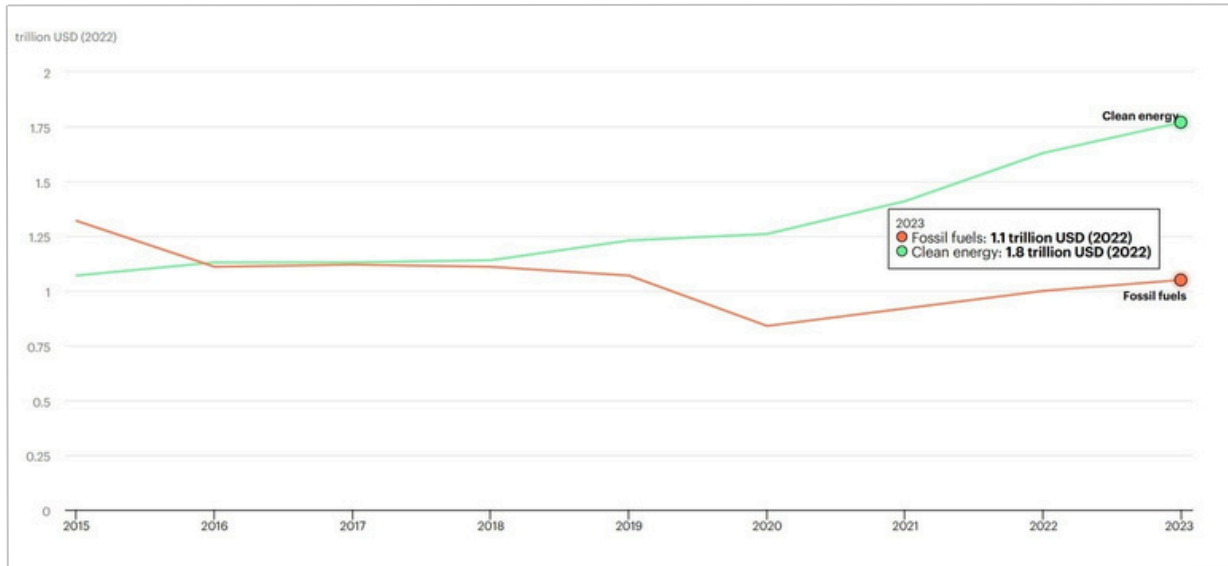


NEWSLETTER

" GLOBAL ENERGY TRENDS: A DANCE BETWEEN OLD AND NEW"



There's a sense of unwarranted stability in the energy world. While some immediate pressures have eased, the bigger challenges of geopolitical instability, climate change, and ensuring energy access for all still remains.

The need for effective solutions to improve energy security, tackle emissions, and ensure clean energy access for all is more critical than ever. While a complete takeover isn't quite here yet, clean energy is definitely challenging fossil fuel dominance in the global energy market. Here's how the tide is turning:

Investment Shift:

- **Money talks:** Clean energy is attracting significantly more investment than fossil fuels. The International Energy Agency (IEA) reports that for every dollar invested in fossil fuels, about 1.7 dollars are now going into clean energy. This trend is expected to continue, fueled by:
- **Government incentives:** Many countries are offering subsidies and tax breaks for renewable energy production and consumption.

- **Cost competitiveness:** Advancements in technology are making renewables like solar and wind power more affordable, reaching grid parity in many regions.

Technological Advancements:

Renewables are getting better:

Technological innovations are improving the efficiency and affordability of clean energy solutions. For example:

- Solar panels are becoming cheaper and more efficient at converting sunlight into electricity.
- Wind turbines are getting larger and more powerful, capturing more wind energy.
- Battery storage solutions are improving, allowing for better integration of renewable energy into the grid, which has traditionally relied on dispatchable fossil fuel plants.

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Environmental Concerns:

- **The climate change factor:** Growing public awareness of climate change is driving a shift towards cleaner energy sources. People are pressuring governments and businesses to adopt sustainable practices.
- **Regulations and policies:** Many countries are implementing stricter regulations on carbon emissions, making fossil fuels a less attractive option for power generation.

Impact on Fossil Fuels:

- **Not a clean sweep:** Fossil fuels aren't disappearing overnight. They still have a significant role to play, especially in sectors like transportation where clean alternatives are still under development.
- **Squeezed market share:** However, the rise of clean energy is squeezing fossil fuels' market share, particularly in electricity generation. As renewable energy sources become more cost-competitive and efficient, their share of the energy mix is expected to continue growing.

Challenges Remain:











- **Intermittency:** Some renewable energy sources like solar and wind are intermittent, meaning they don't produce energy consistently. This can create challenges for integrating them into the grid.
- **Storage limitations:** Energy storage solutions are crucial for managing the intermittency of renewables. However, current battery storage technologies still have limitations in terms of capacity and cost.

The takeaway: Clean energy is on the rise, driven by economic, technological, and environmental factors. While fossil fuels won't disappear entirely in the near future, their dominance is being challenged. The transition to a clean energy future is well underway, with significant investments and advancements happening all around the world.











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- **Boom or Bust?** Exploring Potential Scenarios of Large Language Model (LLM)
- **Plant-based Food:** The future is sprouting! Rise in demand for plant-based food in F&B sector.
- **Indian IT Services:** A Year of Resilience in a Challenging FY24

Month in review

Date		Company Name	Report name	CMP	TP	Rating
Apr-15		Tata Consumer Products Limited	Doubling down on growth with acquisition	1145.3	1255	BUY
Apr-18		Alibaba Group Holdings Ltd	Investing for better shopping experience	74.2	82	BUY
Apr-23		Qualys, Inc.	Advancing solutions and raising opportunities	162.05	181	BUY
Apr-29		CyberArk Software Ltd.	The "integrated security" is revolutionizing the industry	240.11	266	BUY
Apr-18		Nvidia Corporation	Amplified by partnerships	860.01	960	BUY
Apr-24		Riot Platforms, Inc.	Driven by Bitcoins Growth	11.85	13.5	BUY
Apr-18		UnitedHealth Group Inc	UnitedHealth Group: A Diverse and Innovative	478.99	545	BUY
Apr-02		Stryker Corporation	Stryker's Surge: Exceeding Expectations with Sustainable	354.67	390	BUY
Apr-24		Intuit, Inc	Built stronger with tax innovation and small business	605.17	691	BUY
Apr-18		Palantir Technologies Inc	2023: A breakthrough year. Palantir soars	22.42	24.7	BUY

Up coming coverage

	Company Name	CMP
	Workday, Inc.	244.96
	Salesforce, Inc	268.69
	Taiwan Semiconductor Manufacturing Co.	772.00
	Broadcom, Inc.	1242.86
	StoneCo Ltd	15.74
	Warner Bros. Discovery	7.62
	JD.com Inc	120.40
	Walmart Inc	58.85
	Shopify Inc	70.40
	Hewlett Packard Enterprise Co	16.44

Sector report - April 2024

- The LLM Funding Roadmap 2024 – Vol 2 – “The Future of Language is Funded”
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- The “FANG” Q1’ 2024 Performance – FANGtastic Q1? Not Really.


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