



## Infrastructure Sector poised for a bull run for the next 3 years

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It will be among the lead gainers in the current calendar year as this is the one sector which has suffered the most in the last few years. There has been a dilemma with regards to issues like land acquisition, fuel linkages, mining and environment. All these have had a negative impact on the infrastructure sector in the last two-three years. But now with the new land acquisition bill coming in, environmental issues have taken care of and the problem of fuel linkages being addressed, infrastructure as a sector should benefit.

Once the capex cycle starts on the back of government policy, large-cap construction companies like Larsen & Toubro and NTPC will benefit. Not only that, but everything that helps in the capital formation cycle, such as capital goods, engineering, power, mining and construction would also do well.

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