The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$2.7-3.0 bn, FY26
- Exchange and clearing revenue
- April 2025 to March 2026

Primary economic engine

Equity and derivatives transaction fees, clearing, SME listings, co-location services and GIFT City international markets.

Boardroom Focus

01 **Strengthen derivatives risk controls and market integrity**

02 **Expand GIFT City participation and diversified revenues**

03 **Build resilient clearing and faster settlement capability**

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Dominant domestic platforms → stronger exchange competition and IFSC markets.

02 Technology

Manual oversight → faster settlement, broker APIs and AI-assisted surveillance.

03 Evidence and trust

Trading volume alone → investor outcomes, position data and market integrity.

04 Economics

Turnover dependence → diversified clearing, market-data and infrastructure fees.

05 Socio-cultural

Relationship brokers → app-led participation and greater investor-protection scrutiny.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in organised financial exchanges

01 Market opportunity

GIFT City markets, AI risk engines, co-location services and well-governed derivatives products.

02 Disruption

Derivatives restrictions, latency and fairness concerns, cyber threats and cross-border rules.

03 Sector impact

Volume shifts pressure fee income; stronger surveillance and cyber controls raise operating requirements.

04 Strategic response

Build manipulation-detection tools, secure broker APIs and reliable digital market access.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Exchange technology firms, co-location providers, digital brokerages and clearing infrastructure.

SURGE

Scale emerging lines

Advanced clearing services, SME listing platforms, GIFT City markets and accessible digital interfaces.

SHRINK

Reduce exposure

Manual broker back offices, unhedged currency exposure and inadequately controlled brokerage tools.

SUNSET

Exit structurally weak models

Paper-based clearing, manual settlement processes and obsolete physical trading workflows.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- Market-risk, margin, clearing and settlement requirements
- IFSCA and foreign-exchange controls for cross-border markets
- Cyber resilience, personal-data protection and secure member access

02 Board oversight priorities

- Strengthen derivatives surveillance and clearing risk controls
- Expand GIFT City participation with sound product governance
- Protect market infrastructure and support faster settlement

Director's Future Role

Strategy, finance and operations

Strategy

Model derivatives-volume shifts, IFSC products, SME listings and faster-settlement adoption.

Transformation

Upgrade clearing and co-location platforms; implement faster settlement and IFSC services.

Finance

Improve clearing and data-service economics; manage infrastructure costs and currency exposure.

Risk & Compliance

Govern margins, default resources, market integrity, cyber incidents and cross-border compliance.

Operations

Optimise matching performance, co-location services and dependable settlement operations.

Supply Chain

Secure low-latency infrastructure, market-data services, cyber tools and data-centre capacity.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Test trading uptime, clearing accuracy, fair access and disaster recovery.

Business Development

Expand institutional participation, co-location relationships and GIFT City market access.

Sales

Onboard brokers, algorithmic firms, SME issuers and international market participants.

Marketing

Explain market access, product features and risks through clear, responsible communication.

Client Experience

Support members and issuers with onboarding, investor education and settlement assistance.

Product & Technology

Build reliable matching engines, secure APIs, listing tools and governed derivatives products.

Director's Future Role

Data, people and governance

Data & Analytics

Detect manipulation, improve margin models and analyse latency and investor outcomes.

Information Security

Protect trading, clearing, co-location and member APIs with tested cyber controls.

People & Culture

Recruit quantitative and exchange engineers; develop surveillance and operations talent.

Learning & Development

Train staff and members in risk controls, settlement operations, surveillance and cyber hygiene.

Legal

Protect matching-engine IP; govern market rules, co-location contracts and data obligations.

ESG & Sustainability

Reduce data-centre waste and environmental impacts; strengthen facility and worker safety.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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