Subject: Analysis of Telecom Companies' Revenue and Profit Impact.

Hi Elisse,

I hope this message finds you well. I have reviewed several analyst reports regarding the impact on revenue and profits for telecom companies operating in various markets, particularly focusing on the implications of adopting new business models such as handset leasing and smartphone rentals.

Summary of Findings:

1. **Handset Leasing Model**:
   * Reports indicate that telecom companies like Sprint are increasingly focusing on handset leasing to accelerate growth. This model allows customers to pay lower upfront costs for devices, which can drive higher subscription rates.
   * Sprint's shift towards leasing has reportedly contributed to a significant increase in customer acquisition and retention, leading to improved revenue streams.
2. **Smartphone Rentals**:
   * The analysis from Mobile World Live suggests that smartphone rentals offer surprising value for consumers, particularly in markets with high device costs. This model appeals to budget-conscious customers who prefer flexibility over ownership.
   * The rental approach can lead to increased customer loyalty and recurring revenue for telecom providers, as customers are likely to return for upgrades or new devices.
3. **Financial Implications**:
   * According to Phillip Capital's report on the SG Telco sector, companies adopting these innovative models have seen a positive impact on their financial performance. For instance, increased cash flow from leasing arrangements can enhance profitability metrics.
   * The transformation observed in Globe Telecom highlights how embracing new business models can lead to substantial revenue growth and market share expansion.

Based on the findings from the reports, I believe that exploring the handset leasing and smartphone rental models could be an attractive business opportunity for our team. The potential for increased revenue, coupled with the ability to meet evolving consumer preferences, positions these models favorably in the current telecom landscape.

If you would like, I can prepare a more detailed analysis or presentation on this topic for our upcoming meeting.

Thanks & Regards,

Sohel Datta