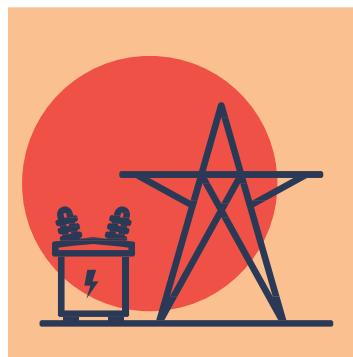


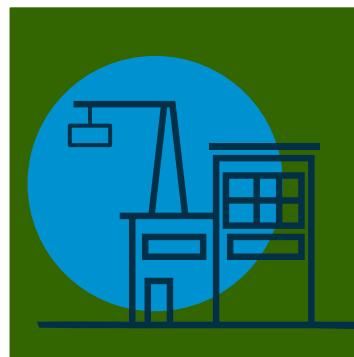
KEC International Limited

Corporate Presentation

01 April 2025



Power T&D



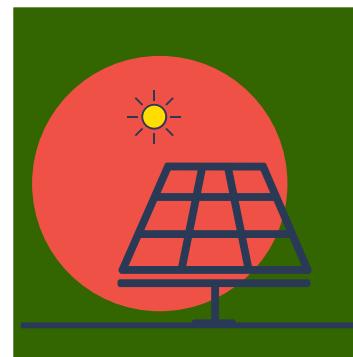
Civil



Transportation



Oil & Gas Pipelines



Renewables



Cables

Disclaimer

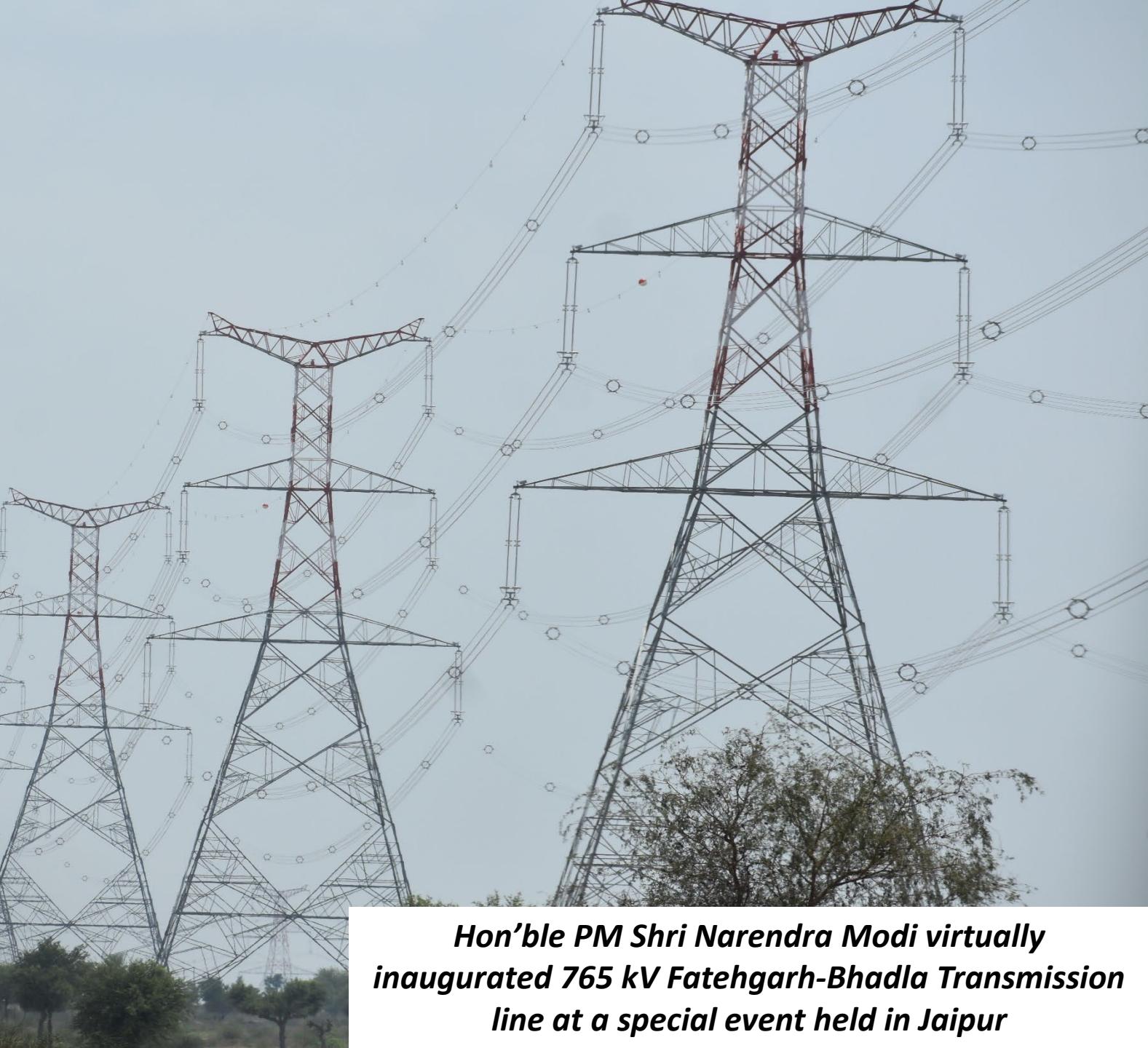
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1

Overview – RPG Group & KEC International



*Hon'ble PM Shri Narendra Modi virtually
inaugurated 765 kV Fatehgarh-Bhadla Transmission
line at a special event held in Jaipur*

RPG Group: Powered by Passion, Driven by Ethics

UNLEASH TALENT
TOUCH LIVES
OUTPERFORM
AND ☺

RPG Enterprises was founded in 1979. The group currently operates various businesses in Infrastructure, Technology, Life Sciences, Plantations and Tyre industries. The group has business history dating back to 1820 AD in banking, textiles, jute and tea. The Group grew in size and strength with several acquisitions in the 1980s and 1990s. RPG Group is one of India's fastest growing conglomerates with 31,000+ employees, presence in 135+ countries and annual gross revenues of USD 4.8 Bn



EPC major in infrastructure segments like T&D, Civil, Transportation, Oil & Gas, Renewables & Cables



One of India's leading tyre manufacturers



Global technology consulting and IT services company



Integrated pharma company in formulations and synthetic APIs



Technology solutions company catering to energy and infrastructure



HARRISONS MALAYALAM LIMITED

One of India's largest plantation companies producing tea, rubber, etc.

KEC International : Building Infrastructure for the World of Tomorrow

8

DECADES

FOOTPRINT IN
110+
COUNTRIES

300+
ONGOING
PROJECTS

\$2.4
BILLION
GLOBAL EPC
MAJOR

83
HAPPINESS
SCORE

7500+
EMPLOYEES

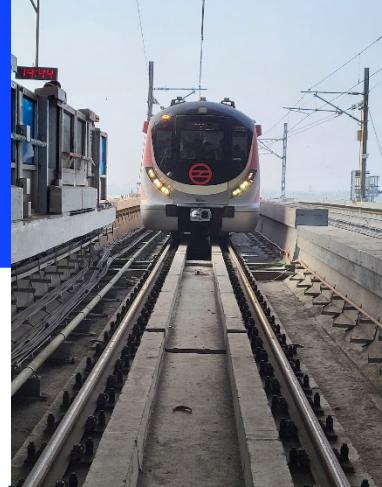
40+
NATIONALITIES



Transmission
& Distribution



Civil



Transportation



Oil & Gas



Renewables

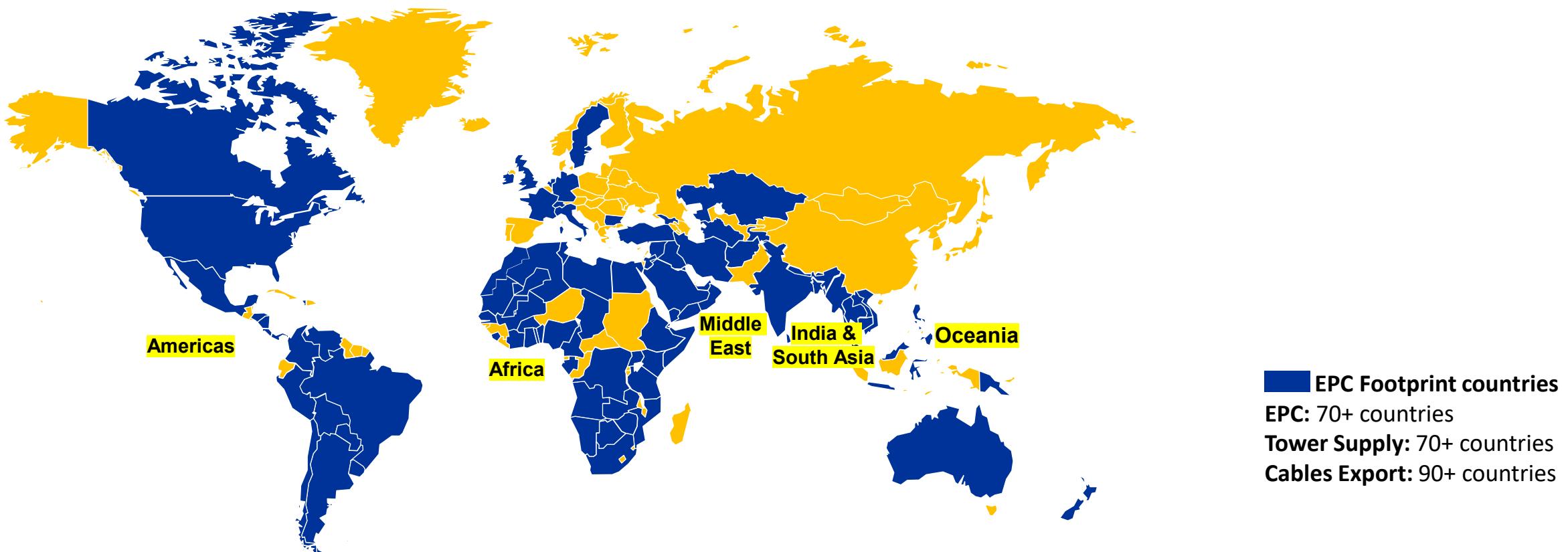


Cables

KEC Overview

- Global infrastructure EPC major
- FY24 Sales: Rs. 19,914 crore (USD 2.4 billion)
- Eight manufacturing facilities across India, Dubai, Brazil and Mexico

Footprint in 110+ countries across the globe



Diverse Portfolio of Offerings



Transmission Lines



Factories



Underground Cabling



Water



Airports



Hospitals



Substations



Residential Buildings



S&T



Metros – Civil



Metros - Tech



Commercial Buildings



OHE



Track Laying



Railway Bridges



Data Centre



TCAS - Kavach



Automatic Signalling



Solar



Tunnel Ventilation



Warehouses



Defence



Speed Upgradation



Converter Stations



Cables



Depot & Workshops



Smart City



Stations & Platforms



Oil & Gas Pipelines



Logistics

Purpose Statement and Culture Pillars

**“WE TRANSFORM LIVES
BY BUILDING SUSTAINABLE
WORLD CLASS INFRASTRUCTURE”**



Board of Directors



H. V. Goenka

Chairman, Non Executive Director



Vimal Kejriwal
Managing Director
& CEO



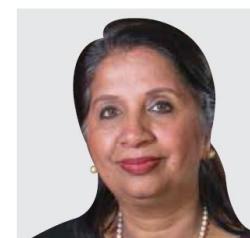
Arvind Singh
Non Executive
Independent Director



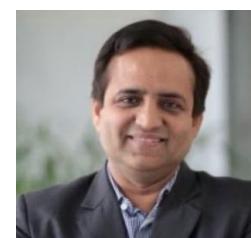
M.S. Unnikrishnan
Non Executive
Independent Director



Neera Saggi
Non Executive
Independent Director



Nirupama Rao
Non Executive
Independent Director



Shirish Sankhe
Non Executive
Independent Director



Vikram Gandhi
Non Executive
Independent Director



Vimal Bhandari
Non Executive
Independent Director



Vinayak Chatterjee
Non-Executive
Non-Independent Director

Management Team



Vimal Kejriwal

Managing Director & CEO, KEC International Limited



Rajeev Agarwal
Chief Financial Officer



Milind Apte
Chief Human
Resources Officer



Anand Kulkarni
Executive Director -
Business Operations



Ganesh Srinivasan
President –
T&D



Prateek Bhattacharya
Managing Director,
KEC Asian Cables Ltd.



Nagesh Veeturi
Executive Director -
Civil



Kaushal Kodesia
Executive Director -
Transportation



Manjit Singh Sethi
Executive Director –
Renewables



Mayank Agrawal
Chief Executive -
Oil & Gas Pipelines



Rakesh Gaur
CEO – SAE & ED – T&D
(Africa & CIS)



Rajinder Gupta
Chief Executive –
T&D (India & Sri Lanka)

2

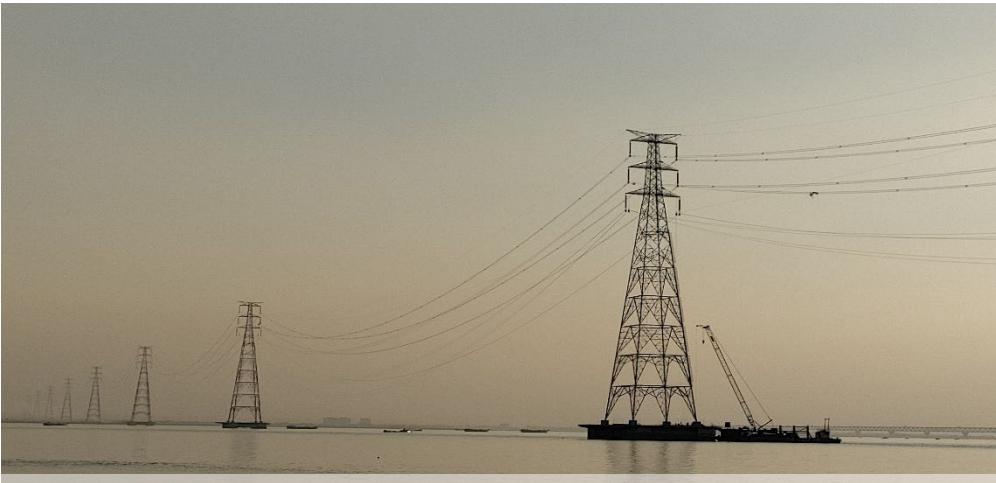
Business Overview



Water Intake System at Bheden, Odisha

Part of the 'Jal Jeevan Mission' - Water supply to various households across various villages

Transmission & Distribution (T&D)



400 kV Padma River Crossing Transmission Line, Bangladesh



132 kV Air Insulated Substation, Papua New Guinea

- One of the largest Power T&D EPC companies; footprint across 70+ countries
- Global leadership with experience of 7+ decades
- Integrated solutions on turnkey basis
 - Transmission Lines up to 1,200 kV
 - Large size substations – Air Insulated up to 1,150 kV, Gas Insulated up to 765 kV & Hybrid Substations up to 220 kV
- Leading turnkey provider of Optical fibre cable laying & Optical ground wire stringing
- Strong capabilities in ahead of schedule & on-time delivery of projects
- Successfully ventured into emerging areas of Digital GIS Substations and HVDC terminal stations
- Leveraging robotic process automation, artificial intelligence, and advanced analytical techniques to improve design timeline and costing accuracy for tendering as well as execution.

Transmission & Distribution (T&D) (contd.)



SAE Towers, USA
Wholly owned subsidiary

- Leading manufacturer of steel lattice transmission towers in the Americas
- 9+ decades of rich and diverse experience in the region
- Expanded hardware portfolio with fittings for OPGW, Cross-rope steel wire and Stock Bridge Damping system
- Products & services offered –
 - End-to-end solutions for building transmission lines & substations
 - Manufactures transmission towers, poles, substation structures, hardware; Annual production capacity of 3,72,200 MTs per annum
 - Comprehensive Tower testing solutions



500 kV SAPEAÇU – POÇÕES III Transmission Line in Brazil



Substation - Gantry Foundation in progress for 138 kV Transmission Line, Nicaragua

In-house capabilities for turnkey solutions



Design & Engineering

- In-house design centers with 400+ engineers across eight centres in India, the Middle East and Americas
- >60 years library of transmission lines design database, including towers, hybrid poles and monopoles; expertise across designing substations (AIS, GIS, Hybrid) and solar structures
- Equipped with latest design, detailing and profiling software



Manufacturing

- Largest globally operating manufacturing capacity of 4,32,200 MTs p.a. (including Transmission towers, Steel poles, Hardware, Structures for Railways, Solar, and Substations)
 - Railway structures' manufacturing capacity of 38,000 MTs p.a.
 - Solar Structures' manufacturing capacity of 10,000 MTs p.a.
- Six tower manufacturing plants – 3 in India, 1 in Dubai, 1 in Mexico and 1 in Brazil



Tower Testing

- Only company in the world to have 4 tower testing stations - 3 in India; 1 in Brazil
- Complete testing solutions for all kinds of transmission towers of up to 1,200 kV, including Lattice and Guyed Towers, Tubular Towers and Monopoles

Transportation



- Currently executing 55+ projects; electrified 19% of the Indian Railway network till date
- Complete turnkey solutions provider in the railway infrastructure EPC space
 - Overhead Electrification systems
 - Signalling & Telecommunication systems for outdoor and indoor installation including Electronic Interlocking (EI) for new lines and capacity augmentation works
 - Traction substations
 - Doubling, tripling, and new railway lines including earthwork and track-laying
- Civil infrastructure such as bridges, tunnels, platforms, stations, residential buildings and workshops
- Electrification, track laying and other services in the technology enabled/ emerging growth areas of Metros, DFCC and High-speed trains
- Manufacture of signalling cables, contact & catenary conductors, quad cables, contact wires, dropper, jumper & feeder wires, earthing conductors, and galvanised steel structures
- Forayed into new technology segments such as KAVACH (TCAS) and Automatic Block Signalling (ABS)



Third Line between Mathura, Uttar Pradesh & Dholpur, Rajasthan



Hubli - Tinaighat Railway Electrification project, Karnataka



Duhai Depot, Delhi-Meerut RRTS project



- Focus on construction of factories, warehouses, residential buildings, commercial complexes, data centres, airports, metros, water pipelines and water treatment plants
- Providing services in an area dominated by small unorganised players and few large companies
- Established as a preferred agency in the construction of factories, especially Cement, Automobile and Auto-ancillaries
- In the league of top 10 contractors executing the slip form technology in Silo Construction
- Currently executing 60+ projects
- Leveraging advanced digital technologies such as drones, photogrammetry, BIM, and IoT in construction and utilising latest formwork technology and mechanisation tools
- Seven decades of experience executing various civil works across the business
- Executing more than 65 high-rise luxury residential and commercial buildings
- Delivering five state-of-the-art Data Centres for public and private clients



Beneficiation Plant at Dariba, Rajasthan



Construction of luxury residential project in Goa



Kochi Metro Rail project, Kerala

Renewables



- One of the few companies with capabilities to execute large-scale projects of up to 600 MWp, including Single Axis Tracker technology and unique solar projects such as carports.
- Capabilities to execute large scale projects >150 MW
- Proficiency in Design, project feasibility analysis across large-scale Solar Photovoltaic Power plants, backed by project management & execution capabilities
- Supply/sourcing of key equipment and structures
- Complete range of civil works and O&M services
- Integrated EPC solutions for solar generation and evacuation
- Preferred EPC status with large international developers
- Secured largest ever solar order of over Rs. 750 Crore for 600 MWp tracker based project



150 MWp Ground Mount Solar Project, Rajasthan



20 MW Solar Carport project, Haryana



30 MW Tracker Based Installation, Andhra Pradesh

Oil & Gas Pipelines



Station Piping Works at Sultanpur-Jhajjar Pipeline Project



Kandla Gorakhpur Pipeline Project

- KEC launched the Oil and Gas Pipelines EPC business in line with the Government's thrust in the sector and our strategy to diversify the business portfolio into adjacencies.
- The business focusses on the construction of Oil & Gas cross-country pipelines in India as well as in international markets.
- Currently executing over 20 projects in oil & gas pipelines, slurry pipelines, and station development projects.
- The team is working on digital Project Management module iTrack to improve planning and monitoring of project progress.
- In October 2021, KEC acquired Spur Infrastructure Private Limited, an Indian EPC company engaged in setting up of cross-country oil & gas pipelines and city gas distribution networks.
- The company is executing prestigious projects for marquee customers such as Indian Oil Corporation Limited, (IOCL) Gas Authority of India Limited (GAIL India), IHB Ltd., Indraprastha Gas Limited (IGL) and Bharat Gas Resource Limited (BGRL).
- In line with the diversification strategy of the Company, the business has ventured into station works development projects, which will further pave the way for entry into process plant projects at terminals and refineries.

Cables

- Extensive range of cables & turnkey cabling solutions offered in 90+ countries
- Two fully integrated facilities, manufacturing a wide range of Power (HT, LT and EHV up to 220 kV), Control & Instrumentation, Telecom, Solar, Railway Signalling Cables and Railway Contact & Catenary Conductors
- Manufacturing capacity includes:
 - Power (~42,150 km p.a.)
 - Instrumentation (3600 km p.a.)
 - Optical fibre (8 lakh fiber km p.a.)
 - Copper telecom (6 lakh conductor km p.a.)
 - Catenary conductors (2,040 MTs p.a.)
 - Contact wire (3,240 MTs p.a.)
- Pioneered production of cross-linked polyethylene (XLPE) cables in India
- Accredited with ISO 9001, ISO 14001 and OHSAS 18001 certifications
- Developed 7 new products in FY24 such as Green Cable, EV Charging Cable, LT AB Cable, UL Cables, Dropper Wires, PV Solar cable, Cathodic Protection cable, etc.
- Continued to be a strategic enabler for KEC's non T&D businesses with ~30% of captive consumption



Cables Manufacturing Facility at Vadodara, Gujarat



Cables manufacturing unit, Mysore, Karnataka



Industrial Project at Odisha

2

Key Performance Highlights & Financial Overview

Financial Highlights Q3 & 9M FY25 – Growth Across Parameters

Q3 FY25 vs Q3 FY24

Revenues

7%
YoY

₹ 5,349 Cr

EBITDA

22%
YoY% 7.0%
₹ 374 Cr

PBT

32%
YoY% 3.0%
₹ 160 Cr

PAT

34%
YoY% 2.4%
₹ 130 Cr

9M FY25 vs 9M FY24

Revenues

9%
YoY

₹ 14,975 Cr

EBITDA

20%
YoY% 6.6%
₹ 989 Cr

PBT

65%
YoY% 2.6%
₹ 385 Cr

PAT

55%
YoY% 2.0%
₹ 303 Cr

Key Business Highlights – Q3 FY25



T&D

- Revenues of Rs. 3,175 Cr, growth of 17% YoY
- Significant traction in order intake with a staggering growth of more than two times and YTD orders of over Rs. 16,000 Cr
- Post completion of capacity expansion at Dubai plant last year, we have now expanded Jaipur plant and are currently expanding the Jabalpur plant capacity



Civil

- Revenues of over Rs. 1,100 Cr
- YTD Order inflow Rs. 2,100 Cr+ in industrial, residential building & Defence segments
- Diversified customer base adding renowned clients in the industrial segment
- Strong order book & L1 of over Rs. 9,700 Cr



Transportation

- Expanded our Transportation portfolio by adding Ropeways to our existing Railway business
- Revenues of Rs. 456 Cr
- YTD order intake of over Rs. 2,000 Cr
- Focus on fast-tracking completion of existing projects & collection of receivables



Oil & Gas

- Revenues of Rs. 76 Cr
- Widened footprint by securing its first order in the composite space (including design, supply and build)
- Sustained focus on enhancing pre-qualifications to expand the size of addressable market
- Focusing on International opportunities



Renewables

- Revenues of Rs. 238 Cr, growth of 50%+
- Successfully commissioned 3rd phase of the 500 MW solar project in Karnataka, bringing the total capacity commissioned to 200 MW
- Order book & L1 of over Rs. 1,000 Cr
- Started bidding for Wind EPC projects



Cables

- Successfully transferred the Cables business to KEC Asian Cables Limited, a wholly owned subsidiary of KEC, wef Jan 1st, 2025
- Revenues of Rs. 406 Cr, growth of 6% YoY
- Commissioned first phase of Aluminium Conductor Plant, with final phase on track for commissioning by end March 2025

Profit and Loss Summary (Consolidated)

Revenues		
EBITDA		
<i>EBITDA Margins</i>		
(+) Other Income		
(-) Depreciation		
(-) Interest		
<i>Interest as % to Revenue</i>		
PBT		
<i>PBT Margins</i>		
Tax		
<i>Tax Rate %</i>		
PAT		
<i>PAT Margins</i>		

Q3 FY25	Q3 FY24	Growth (Y-o-Y)
5,349	5,007	7%
374	308	22%
7.0%	6.2%	
1	26	
45	49	
170	164	4%
3.2%	3.3%	
160	121	32%
3.0%	2.4%	
30	24	
18.9%	19.8%	
130	97	34%
2.4%	1.9%	

9M FY25	9M FY24	Growth (Y-o-Y)
14,975	13,749	9%
989	827	20%
6.6%	6.0%	
27	45	
137	137	
493	501	-2%
3.3%	3.6%	
385	233	65%
2.6%	1.7%	
83	38	
21.5%	16.4%	
303	195	55%
2.0%	1.4%	

(₹ crore)

*EBITDA for 9M FY25 includes an amount of Rs. 24 Cr received towards an arbitration award

Profit and Loss Summary (Standalone)

Revenues		
	4,758	4,398
		8%
EBITDA		
	281	211
		33%
<i>EBITDA Margins</i>		
	5.9%	4.8%
(+) Other Income		
	4	29
(-) Depreciation		
	37	38
(-) Interest		
<i>Interest as % to Revenue</i>		
	154	146
		5%
	3.2%	3.3%
PBT		
	93	56
		67%
<i>PBT Margins</i>		
	2.0%	1.3%
Tax		
<i>Tax Rate %</i>		
	20	12
		21.9%
	21.2%	
PAT		
	73	44
		65%
<i>PAT Margins</i>		
	1.5%	1.0%

	Q3 FY25	Q3 FY24	Growth (Y-o-Y)
	4,758	4,398	8%
	281	211	33%
	5.9%	4.8%	
	4	29	
	37	38	
	154	146	5%
	3.2%	3.3%	
	93	56	67%
	2.0%	1.3%	
	20	12	
	21.9%	21.2%	
	73	44	65%
	1.5%	1.0%	

	9M FY25	9M FY24	Growth (Y-o-Y)
	13,130	12,082	9%
	709	564	26%
	5.4%	4.7%	
	56	50	
	112	107	
	443	436	1%
	3.4%	3.6%	
	210	71	197%
	1.6%	0.6%	
	47	16	
	22.4%	22.8%	
	163	55	199%
	1.2%	0.5%	

(₹ crore)

*EBITDA for H1 FY25 includes an amount of Rs. 24 Cr received towards an arbitration award

Businesswise Revenue Performance (Consolidated)

Particulars	Q3 FY25	Q3 FY24	Growth (Y-o-Y)	9M FY25	9M FY24	Growth (Y-o-Y)	(₹ crore)
T&D:							
- T&D (KEC)	3,175	2,723	17%	8,505	7,072	20%	
- SAE Towers	2,866	2,383	20%	7,533	6,091	24%	
	309	340	-9%	972	981	-1%	
Non T&D:							
- Civil	2,278	2,475	-8%	6,739	7,180	-6%	
- Transportation	1,102	1,099	0%	3,312	3,108	7%	
- Oil & Gas Pipelines	456	653	-30%	1,430	2,193	-35%	
- Renewables	76	182	-59%	293	414	-29%	
- Cables	238	157	52%	492	280	76%	
	406	383	6%	1,211	1,185	2%	
Inter SBU:							
Total Net Sales	5,349	5,007	7%	14,975	13,749	9%	
T&D Share	59%	54%		57%	51%		
Non T&D Share	41%	46%		43%	49%		

Borrowings & Working Capital (Consolidated)

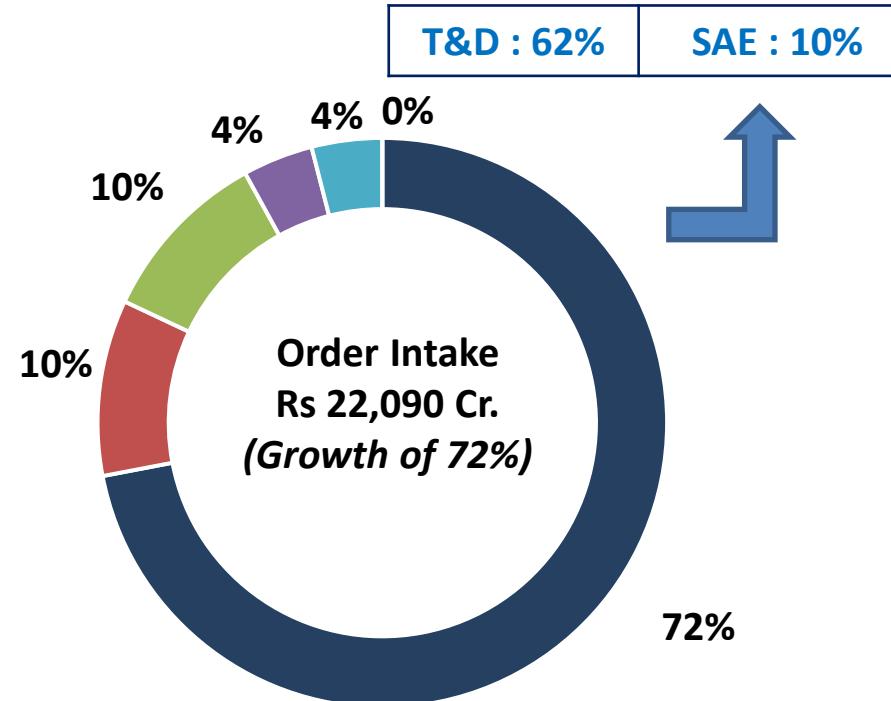
(₹ crore)

Particulars	31-Dec-24	31-Dec-23	Increase/ (Decrease)	30-Sep-24	Increase/ (Decrease)	31-Mar-24	Increase/ (Decrease)
I) Net Debt	4,064	4,445	-381	3,566	499	3,553	511
II) Interest Bearing Acceptances	1,510	1,600	-90	1,699	-190	1,537	-27
Total (I + II)	5,574	6,045	-471	5,265	309	5,090	484

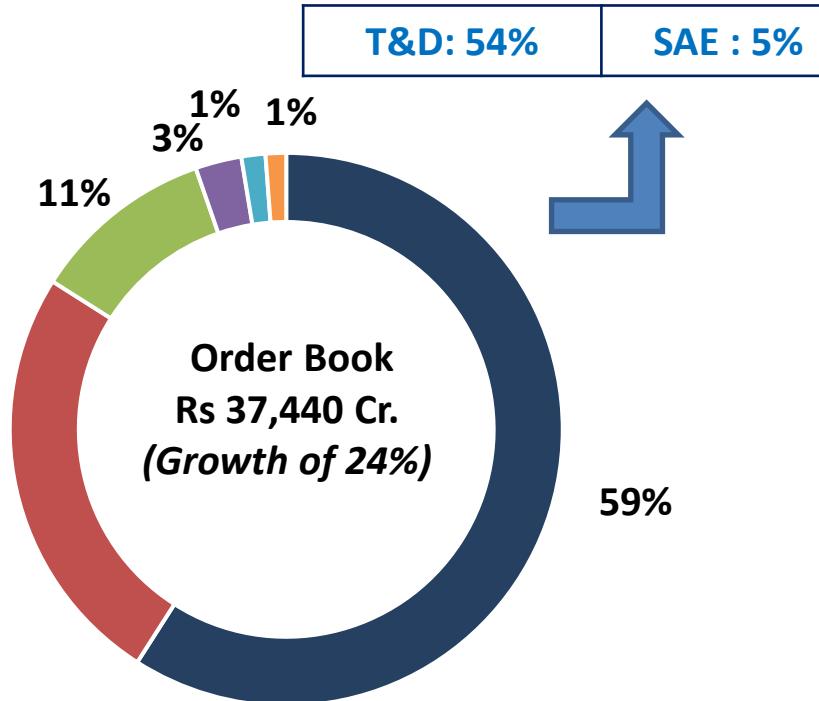
- **Net debt including acceptances** stand at Rs. 5,574 Cr as of Dec 31, 2024, a reduction of Rs. 471 Cr vis-à-vis Dec 31, 2023
- **Net Working Capital (NWC)** stands at 134 days as on 31 Dec'24 vis-a-vis 129 days as on 31 Dec'23. We continue to focus on below initiatives to optimize working capital:
 - Judicious monitoring of cash flows through daily/ weekly war rooms
 - Release of Retention through focused commercial closure of projects
 - Commercial execution of projects thereby reducing dependency receivables
 - Cash flows and working capital are expected to improve considering the quality of order intake

Order Intake & Order Book (Consolidated)

Order Intake – YTD FY25



Order Book – YTD FY25



✓ Robust Order Book + L1 of over Rs 41,000 Crore

✓ Tenders under Evaluation and in Pipeline of over Rs. 1,50,000 Crore

Business Outlook Looks Promising

TAILWINDS



HEADWINDS



- ↑ Government's focus on infrastructure
- ↑ Substantial momentum in T&D
 - India T&D – Increasing demand for power and the Government's focus on expanding renewable energy projects
 - International T&D – Promising opportunities across regions such as the Middle East, Africa, CIS, and the Americas
- ↑ Green shoots in private capex/ real estate
- ↑ Substantial opportunities in Renewable EPC
- ↑ In Transportation, Government focus is shifting towards conventional infrastructure development/ safety – *Kavach*
- ↑ International opportunities in Transportation, Civil and Oil & Gas
- ↑ Robust Order book and Tender Pipeline

- ↓ Manpower availability improves, however shortage persists
- ↓ Geopolitical unrests
- ↓ Subdued performance in Transportation - Increased competition/ Cash flow & Margin pressure
- ↓ Slow down in Water projects - Delayed collections

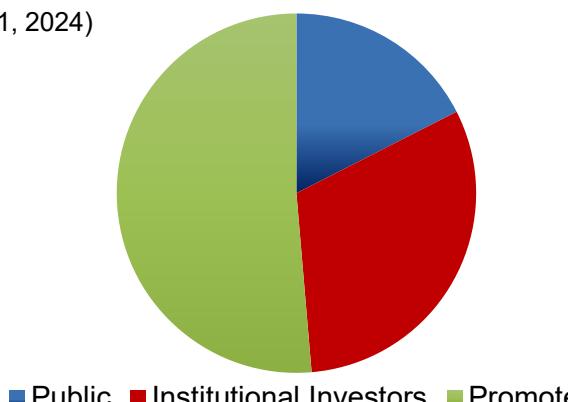
KEC: Equity Share Information

Year-End Market Capitalisation (Rs. Crore)



Shareholding Pattern

(As of March 31, 2024)



Equity Share Information (₹ crore)

- Share Price (04 Feb 2025): Rs. 812.90/share
- Market Cap (04 Feb 2025): Rs. 21,600+ crore
- Financial Year – April to March
- Listed on Indian Stock Exchanges
- Bloomberg Code – KECI IN
- Reuters Code – KECL.BO

- Successfully completed a Qualified Institutional Placement (QIP), raising Rs. 870 Cr. in Q2 FY25
- This placement received demand of around seven times

Notable participants in this placement include HDFC Mutual Fund, Nippon Mutual Fund, Aditya Birla Mutual Fund, Bandhan Mutual Fund, DSP Mutual Fund, Motilal Oswal Mutual Fund, White Oak Capital, BlackRock, SBI Life Insurance, and ICICI Prudential Life Insurance



4

Environmental, Social and Governance (ESG)

500 MW Solar Project at Pavagada, Karnataka

ESG & Sustainability Goals and Status



Happiness Quotient

Target: Increase Happiness Quotient to 85% by FY26

Status:

Happiness Quotient for FY24 has increased to 83% vis-à-vis 80% for FY21



Diversity & Inclusion

Target: Increase in diversity by 25% by FY26

Status:

Diversity has increased by 31% in FY24 vis-à-vis FY21



Occupational Health & Safety

Target: Work towards the goal of achieving Zero accidents

Status:

LTIFR has reduced to 0.22 in FY24 vis-à-vis 0.68 in FY21, a reduction of 68%



Corporate Social Responsibility

Target: Reach 2 lac CSR beneficiaries by FY 26

Status:

CSR beneficiaries for FY24 are 3.2 lakh



Circularity

Target: Zero waste to landfill by FY 26 for manufacturing plants

Status:

Waste to landfill has reduced by 53% in FY24 vis-à-vis FY21



Water Positive Approach

Target: Reduce water consumption intensity in manufacturing plants by 20% by FY26

Status:

Water consumption intensity has reduced by 20% in FY24 vis-à-vis FY21



Energy Consumption

Target: Reduce energy consumption intensity of manufacturing plants by 15% by FY26

Status:

Energy consumption intensity has reduced by 28% in FY24 vis-à-vis FY21



Carbon Emission

Target: Reduce Greenhouse Gas (GHG) emissions intensity of manufacturing plants by 20% by FY26

Status:

GHG emission intensity has reduced by 25% in FY24 vis-à-vis FY21



Sustainable Procurement

Target: 100% of key suppliers to be assessed under ESG criteria by FY23

Status:

100% of key suppliers assessed under ESG Criteria

Sustainability Roadmap – Key Initiatives and Approach



Happiness Quotient

- Conducting awareness sessions on the recently launched Purpose Statement and Culture Pillars
- Launched Happy Exchange, a digital recognition platform featuring Happiness coins



Circularity

- Reusage of construction waste to make shelters and support boards for safety signages
- Agreement with local bodies for collection and disposal of solid wastes to other than landfill



Diversity & Inclusion

- 100+ female Engineering leadership trainees hired
- Nurturing diversity through awards, Employee engagement activities, Townhalls, Trainings, etc.



Water Positive Approach

- Installation of Real Time IOT base Water Management System with electromagnetic flow meters
- Installed Concrete washout area to collect wastewater and reuse



Occupational Health & Safety

- EHS digital transformation initiatives - EHS Assessment scoresheet and EHS Management Information System
- Enhanced focus on safety training for all levels



Decarbonisation

- Reducing energy consumption & carbon emission**
- Use of Solar lighting arrangement for site and material storage area
- Increasing Galva Furnace efficiency & reducing Energy Consumption



Corporate Social Responsibility

- Empowered teachers to design and implement strategies for overall school improvement
- Installation of solar units in 13 schools



Sustainable Procurement

- Formulated the Code of Conduct (CoC) based on sustainability / ESG criteria
- Formulated Sustainable Procurement Policy

THANK YOU



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