



EPACK DURABLE LIMITED

(Formerly Known as EPACK Durable Private Limited)

Regd. Off.: 61-B, Udyog Vihar, Surajpur, Kasna Road, Greater Noida, Gautam Buddha Nagar U.P. 201306
Corporate Off.: TR-901, AltF 142 Noida, 9th Floor, Plot Number 21 and 21A, Sector 142, Noida-201304, U.P.
CIN: L74999UP2019PLC116048,

Ph. No.: 0120-4522467, Email ID: info_ed@epack.in, Website: www.epackdurable.com

January 20, 2026

Listing Department
BSE Limited ("BSE")
Department of Corporate Services
Phiroze Jeejeebhoy Towers
Dalal Street, Mumbai – 400 001
Scrip Code: 544095
ISIN: INE0G5901015

Listing Department
National Stock Exchange of India Limited ("NSE")
Exchange Plaza, C-1, Block G
Bandra Kurla Complex
Bandra (E), Mumbai – 400 051
Symbol: EPACK
ISIN: INE0G5901015

Subject: Investor Presentation on the Unaudited Standalone and Consolidated Financial Results of the Company for the Quarter and Nine Months December 31, 2025

Dear Sir/Ma'am,

Pursuant to Regulation 30 read with Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed herewith Investor Presentation on the Unaudited Standalone and Consolidated Financial Results of the Company for the Quarter and Nine Months ended December 31, 2025.

A copy of same shall also be posted on the website of the Company at www.epackdurable.com

We request you to kindly take this on your record and oblige.

Thanking You

For EPACK Durable Limited

Jyoti
Verma
Digitally signed
by Jyoti Verma
Date: 2026.01.20
20:48:00 +05'30'

Jyoti Verma
Company Secretary and Compliance Officer

Encl. As above



EPACK Durable Limited

Empowering Brands, Defining Excellence

EARNINGS PRESENTATION

Q3-FY26



BUSINESS SNAPSHOT



Leading Living Appliance ODM



Largest Induction Cooktop ODM/OEM



2nd Largest RAC ODM¹



55+ Trusted Customers



4 Pan India Manufacturing locations³



3 NABL Certified R&D labs



Highest Amount of Backward Integration for RACs, LDAs and SHAs⁴



Diversified Portfolio- RAC, LDA, SDA and components



15+ No. of Products



2 Decades + Industry Experience



INR 21,919 Mn. Total Income²



Manufactures critical components such as heat exchangers, copper tubing, PCBAs, etc.

1. In India in terms of number of units (indoor units + outdoor units) manufactured in Fiscal 2023 through the ODM route. (Source: F&S Report)

2. Total Income for the FY 24-25.

3. Manufacturing Facilities in Dehradun, Bhiwadi, Sri City & Silvassa (EPAVO)

4. That has been grown within the same company organically in India (Source: F&S Report)



- 1**
Company Overview
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Q3-FY26 Performance
- 3**
Strategic Overview
- 4**
Historical Financials



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COMPANY OVERVIEW

COMPANY OVERVIEW



- **Incorporated in 2003**, EPACK Durable (EPACK) began as a contract manufacturer of consumer durables, primarily Room Air Conditioners (RACs).

Later in 2012, EPACK transformed into an **Original Design Manufacturer (ODM)** for air conditioners, small domestic appliances and large home appliances. The Company has grown significantly since then and is now the **second-largest ODM player in India**, with a **market share of 24%¹**.

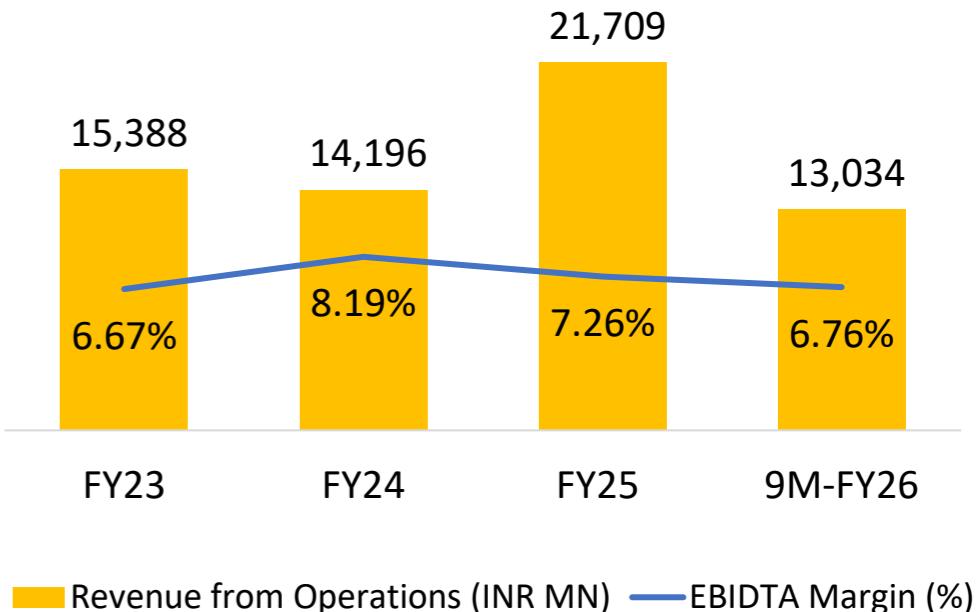
EPACK was **founded by the Singhania and Bothra families**, who have been engaged in the manufacturing of consumer durables for **over two decades**, bringing **extensive industry knowledge and experience** to the Company.

EPACK operates **three strategically located manufacturing facilities in Dehradun, Bhiwadi, and Sricity**. These facilities are **highly backward-integrated**, offering **cost advantages** over competitors by producing key components in-house.

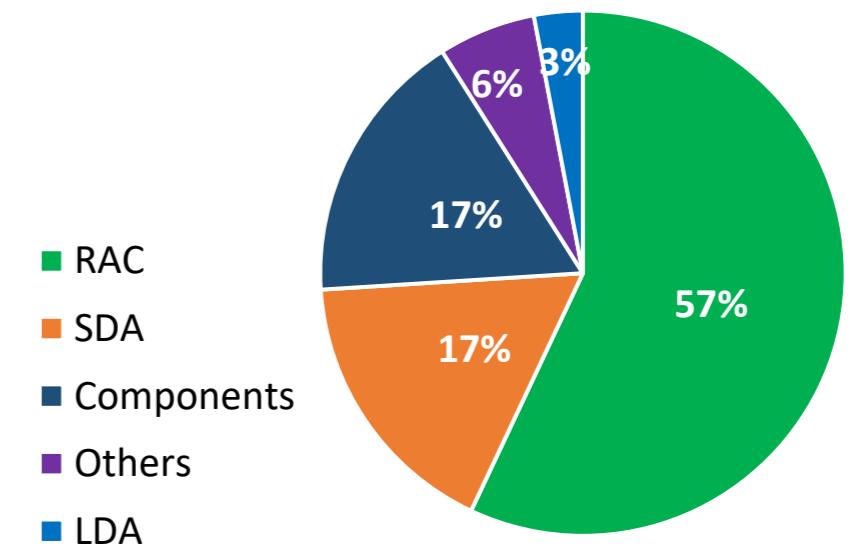
Approximately **57%** of the company's operating revenue comes from the **sale of RACs**, while the **remaining revenue is contributed by Small Domestic Appliances, Large Domestic Appliances, Components & Others**.

EPACK boasts a **marquee clientele**, including **Voltas, Haier, Philips, Panasonic, Godrej, Daikin, Havells, Bosch & Siemens, Bajaj, Crompton & Greaves, Blue Star & Hisense** among others, with whom it has built **long-standing and trusted relationships**.

REVENUE & EBITDA MARGINS



9M- FY26 SEGMENTAL REVENUE CONTRIBUTION*



* Total Operating Revenue Segment Wise

1. In terms of domestically manufactured units by ODM Companies in the Indian RAC ODM / OEM market in FY 2023 (Source: F&S Report)

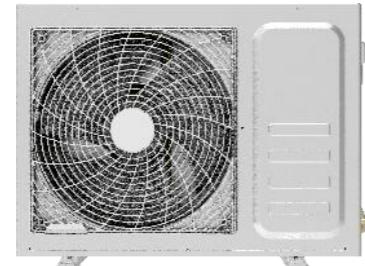
OUR PRODUCTS



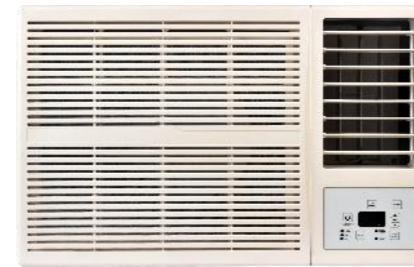
RAC Category



Indoor Unit (IDU)
Range : 9K - 30K
Inverter/ Fixed Speed
Installed Capacity 1.60 Mn



Outdoor Unit (ODU)
Range- 12K-36K
Inverter/Fixed Speed
Installed Capacity 2.05 Mn



Window Air Conditioner (WAC)
Range- 9K- 22K
Inverter/Fixed Speed
Installed Capacity 0.62 Mn

LDA Category



Air Cooler
Range- 85L – 120L
Installed Capacity 0.60 Mn



Washing Machine
Range- Push/Touch Button
7.0KG – 11.0KG
Installed Capacity 0.65 Mn

OUR PRODUCTS (SDA)



Existing Product Range

Induction Stove
Range- 1200W-2200W
(Single)
3500W (Dual)
Installed Capacity 2.00 Mn



Water Dispenser
Range: Floor-Standing
and Table-Top
Installed Capacity 0.11 Mn



Mixer Grinder
Range- 500W-1000W
Installed Capacity 0.62 Mn



Air Fryer
Range- 1500W
(Analog/Digital Model
4L& 5L)



FY26 Launched Products

Infrared Cooktop
Range- 2000W-2200W



Nutri Blender
Range- 300W (Copper motor)



Dry Vacuum Cleaner
Range- 1700 W & 42 LTR



Coffee Maker
Range- 0.65-Litre 600W



FY27 Upcoming Products

Tower Fan
Range- 40W



Hair Dryer
Range- 1600W
(High-Speed DC Motor)



Air Purifier
Range- 5W

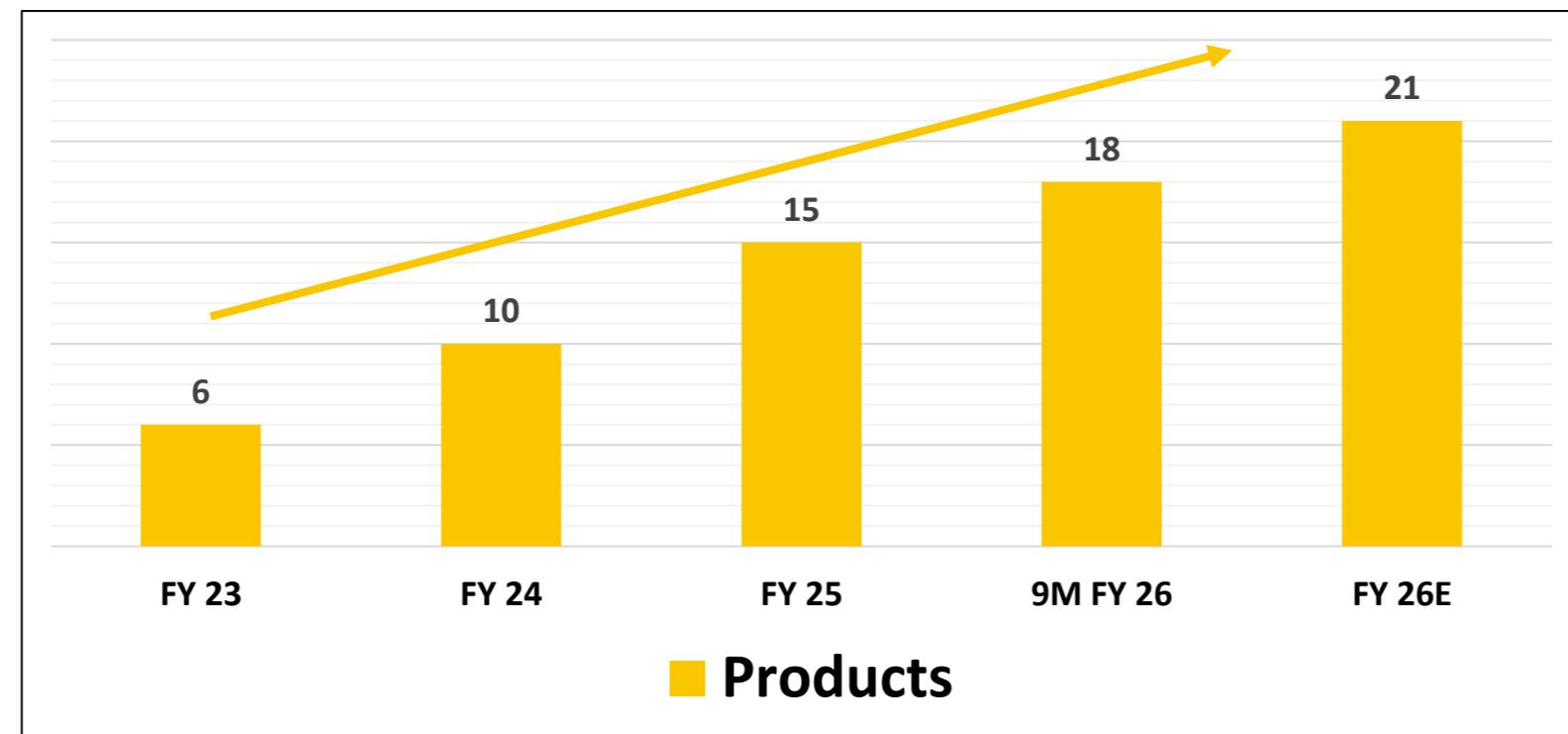
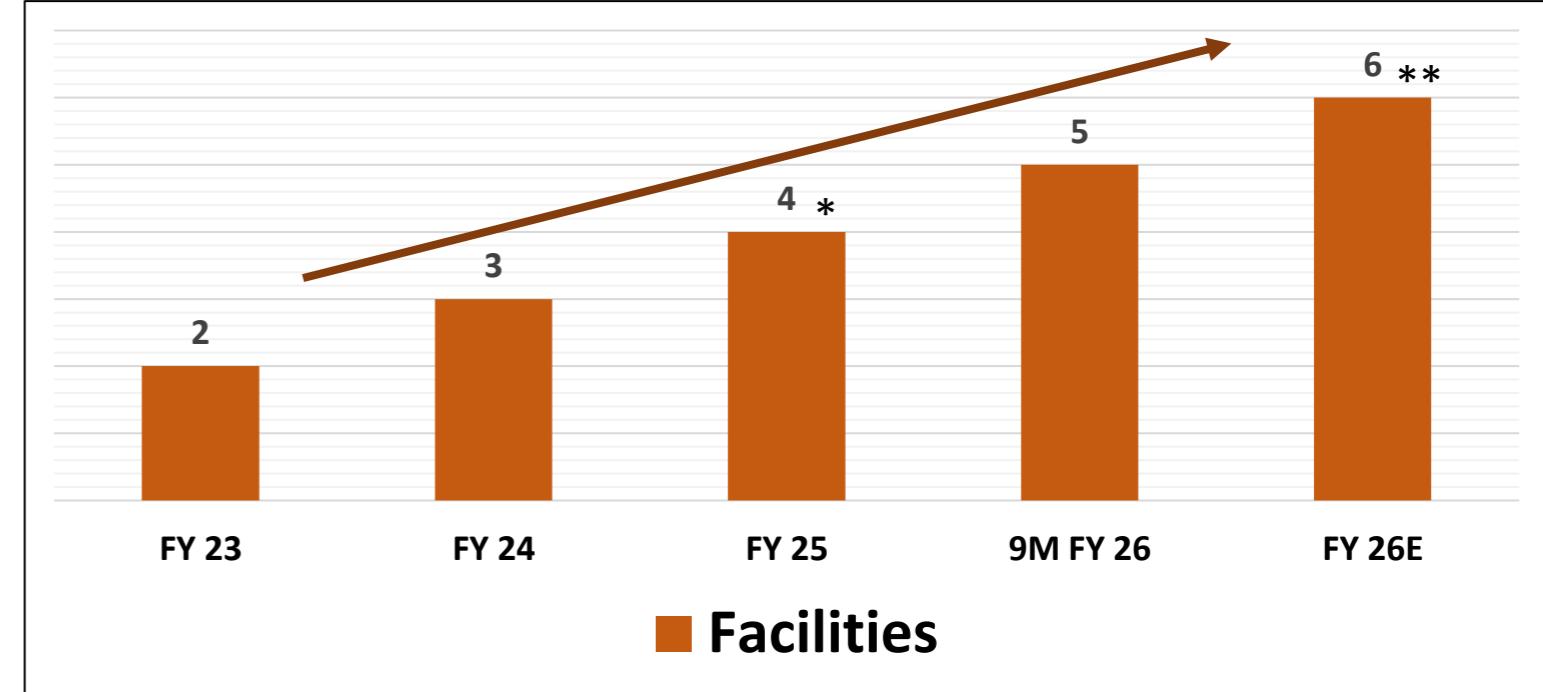
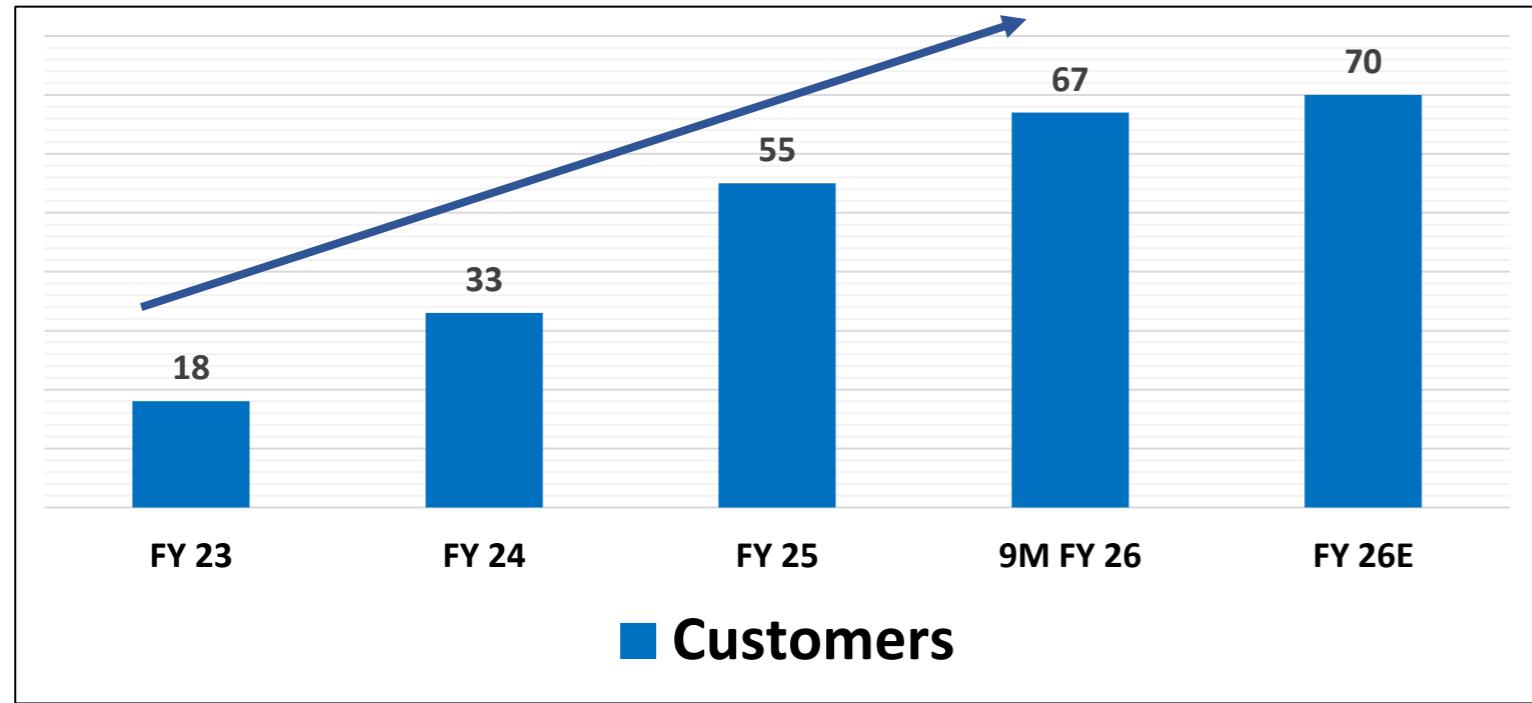


COMPONENTS



	Components	In-house	Components	Segments
	Plastic Molding	✓	✓	IDU, WAC, Refrigerators, Washing Machine, Consumer Durables, Energy Meter, Automotive
	Sheet Metal	✓	✓	ODU, WAC, Refrigerators, Washing Machine, Consumer Durables, Energy Meter, Automotive
	Cross Flow Fan	✓	✓	IDU
	PCB	✓	✓	IDU, ODU, ICT
	Heat Exchanger	✓	✓	ODU, IDU
	Copper Tubing	✓	✓	ODU, IDU
	Universal Motor	✓		Consumer Durable MG
	Induction Coil	✓		Consumer Durable ICT

POSITIVE PROGRESSION



* Including 1 JV Company facility (EPAVO)

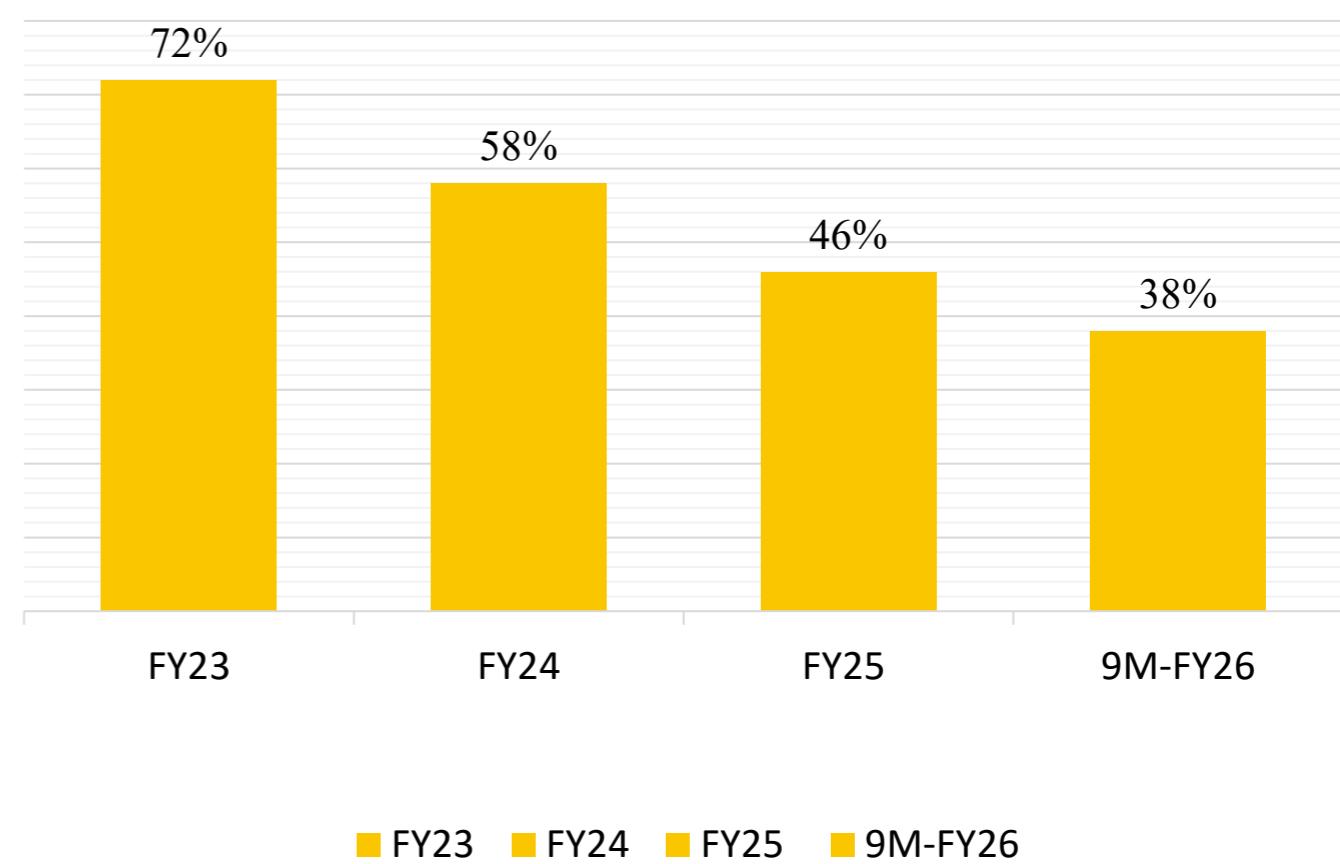
** 2 New Facilities – WOS (EMTPL) and JV Company

CLIENTS



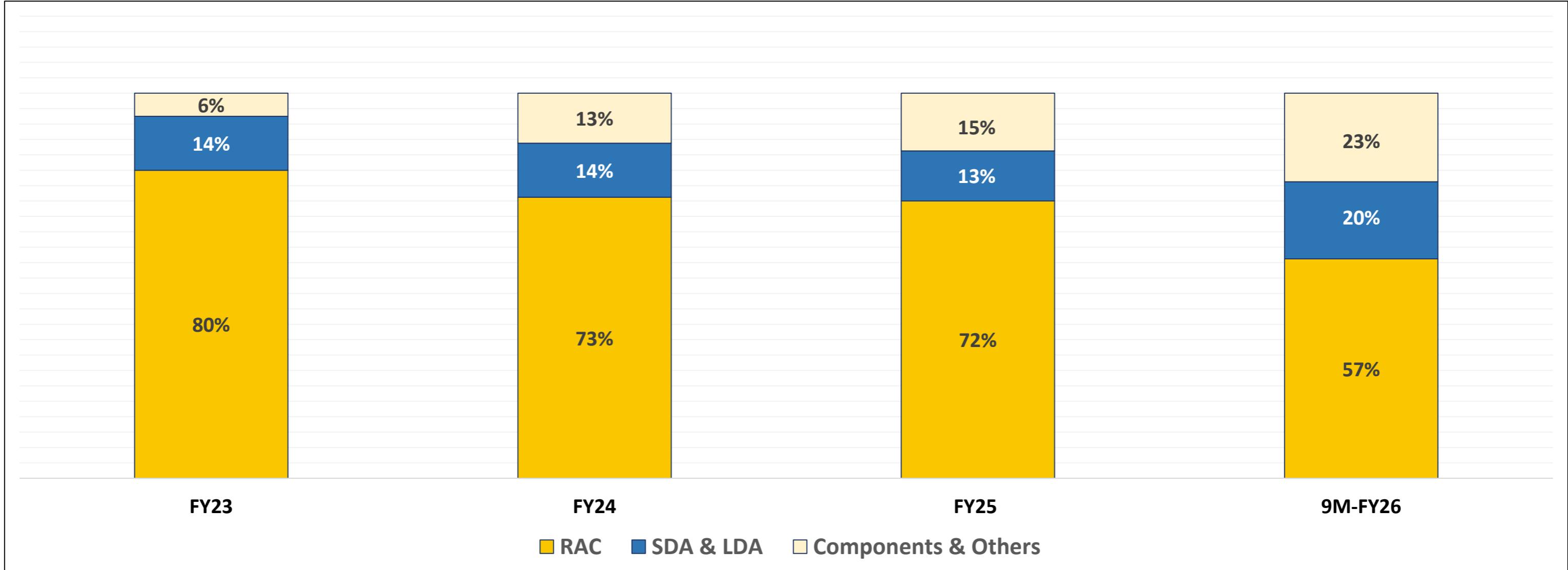
Trusted Partner of India's leading Home Appliance Brands

Top 2 Customer Dependency



The dependency on Customer is reducing from 72% in FY 23 to 38% in 9M FY26.

PRODUCT DIVERSIFICATION



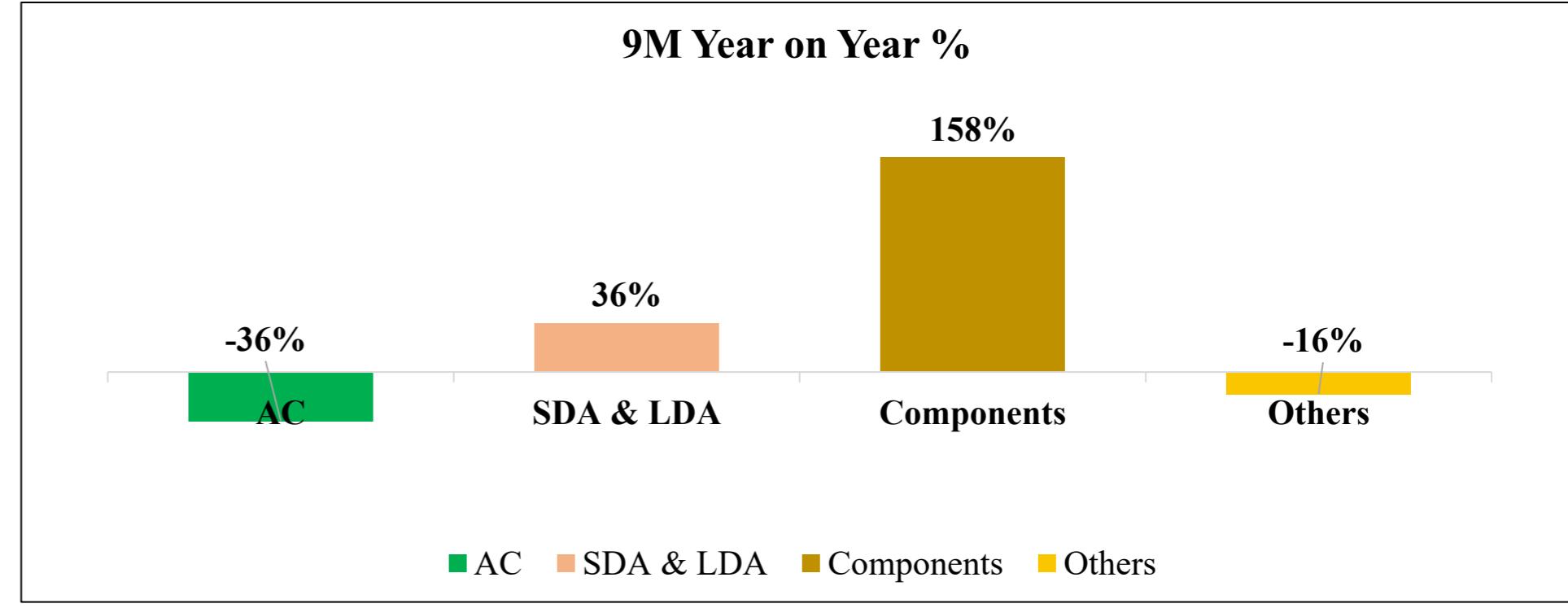
Product Diversification as a % of Operating Revenue

The dependency on RAC business is reducing from 80% in FY 23 to 57% in 9M-FY26.
 New Product SDA, LDA and component are in increasing trends.

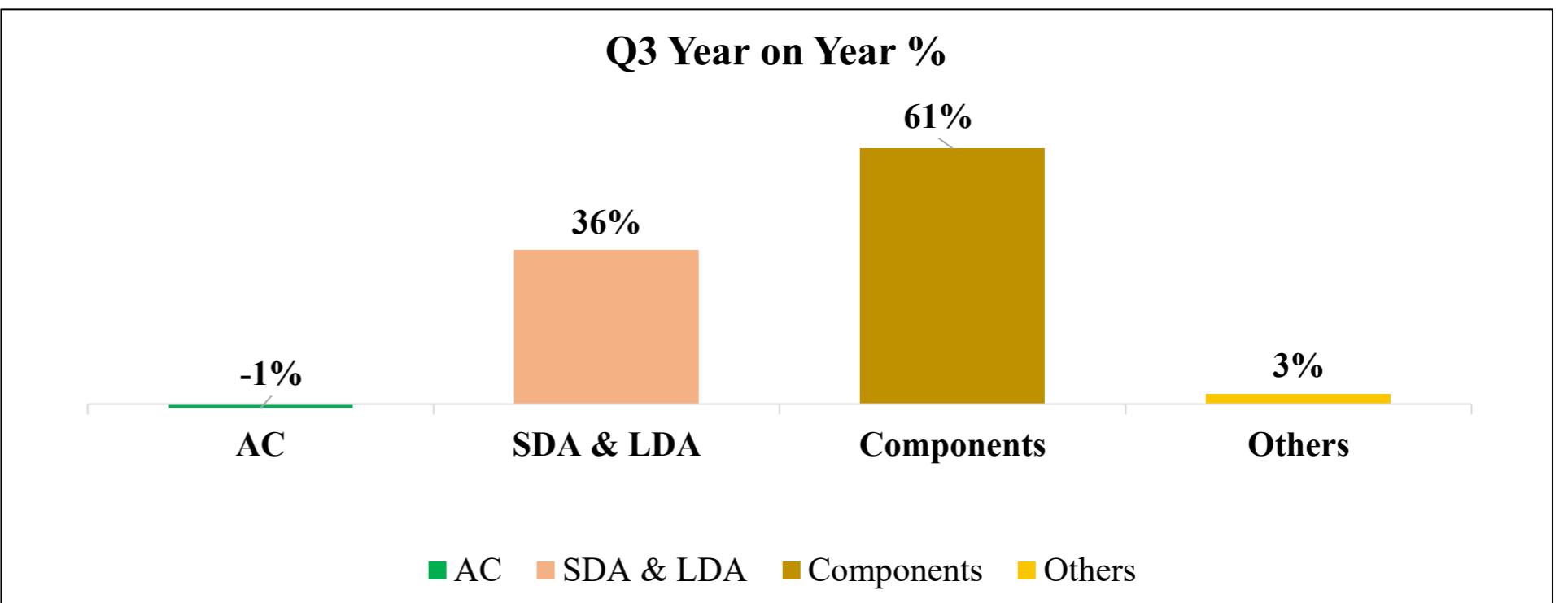
PRODUCT SALES



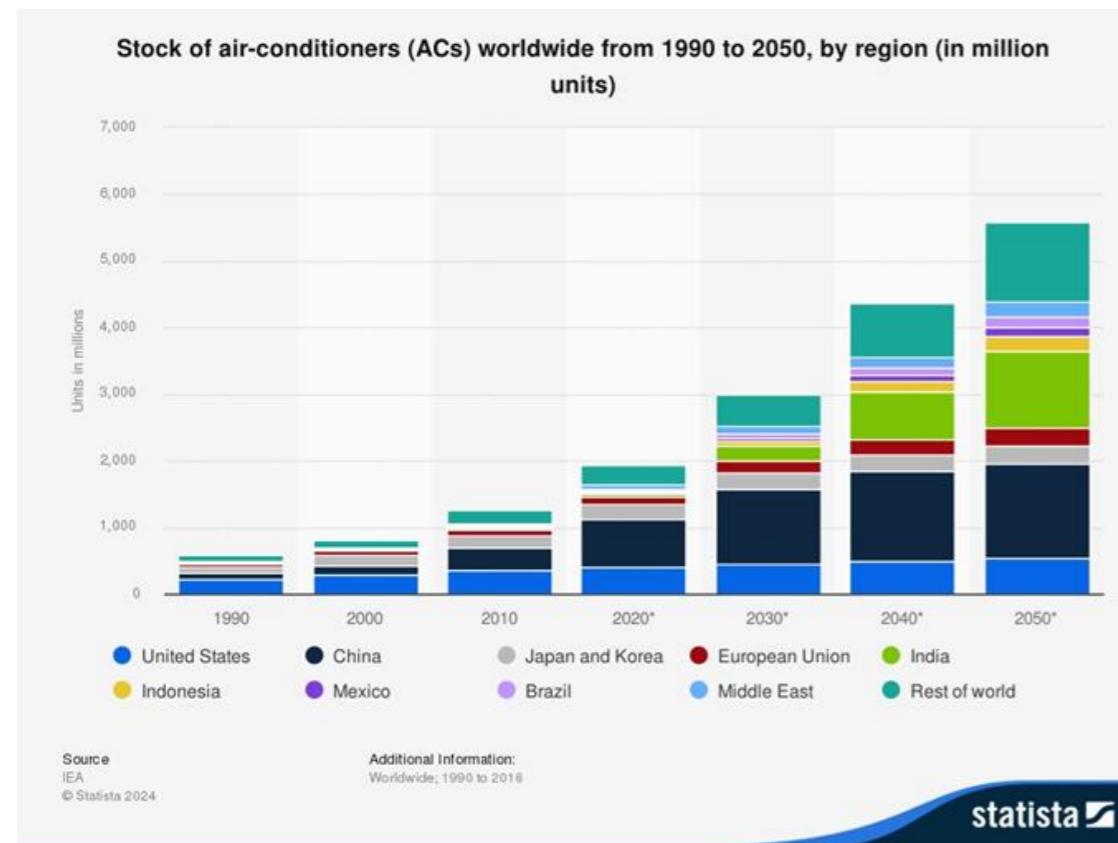
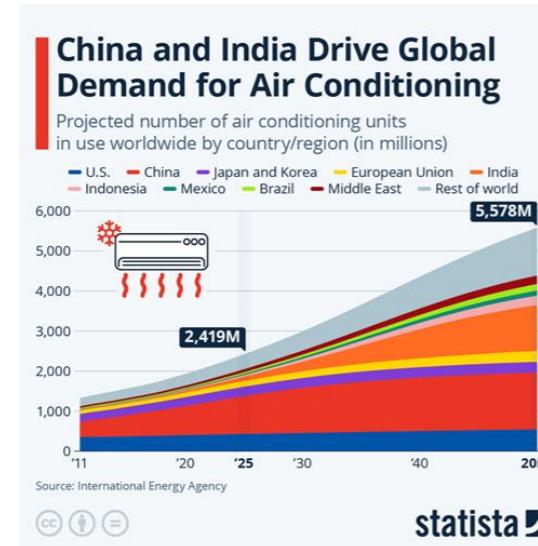
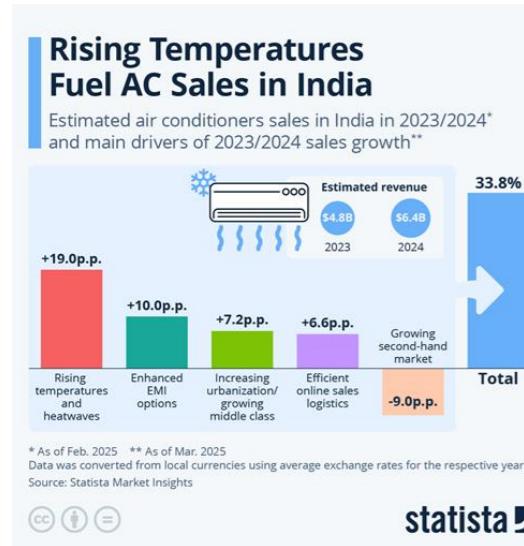
Product (Mn INR)	9M FY26	9M FY25	YOY
AC	7,380	11,571	-36.2%
SDA & LDA	2,642	1,941	36.1%
Components	2,270	879	158.4%
Others	741	885	-16.3%
Total Operating Revenue	13,034	15,276	-14.7%



Product (Mn INR)	Q3 FY26	Q3 FY25	QOQ
AC	2,436	2,459	-0.9%
SDA & LDA	792	580	36.4%
Components & Others	835	520	60.5%
Others	215	210	2.5%
Total Operating Revenue	4,278	3,769	13.5%



RAC BUSINESS OUTLOOK



Despite the headwind in current year, the RAC market is projected to grow annually by 16% (CAGR 2025-2030)

Looking ahead to 2030, volumes in India estimated to grow to 28M units

Low penetration, rising temperatures, increasing disposable income & growing middle class would continue to drive growth

Growth would be fuelled by energy efficient and smart cooling solutions

Shift towards more eco-friendly refrigerants would continue

Regulatory (BIS / BEE) requirements would enable fast manufacturing growth within the country



Top Categories in Demand

Kitchen Appliance – Mixer Grinder, Air Fryers, Juicer, OTG. ICT
 Home Comfort – Air Purifier, Room Heaters, Fan, Humidifier
 Cleaning Tech – Vacuum Cleaners (Robotic & Stick)
 Personal Care – Hair Dryers, Trimmer



EPACK POSITIONING

Ongoing Range- Induction Cooktops, Mixer Grinders, Air Fryers, Water Dispenser, Nutri Blender, Vacuum Cleaner, Infrared ICT, Coffee Maker

Upcoming Range – Tower Fan, Hair Dryer, Air Purifier

What Consumers Want

Millennials - Espresso Coffee maker, Air Fryer, Vacuum Cleaner
 Families – Multipurpose Kitchen Tools and energy-saving fans
 Seniors – Induction Cooktops, Rice Cooker



Air Fryer, Vacuum Cleaner, Induction Cook Tops, Infrared ICT

Top Brands

Indian – Bajaj, Prestige, Usha, Crompton, Havells, Butterfly
 Global – Philips, Panasonic, Bosch, LG, Samsung
 Premium – Dyson, Morphy Richards, Xiaomi



Bajaj, Usha, Crompton, Havells, Philips, Bosch, Preethi, Haier, Bluestar

Growth Drivers

Rise of Nuclear families & urban workstyle
 Aspiration of smart, connected homes
 Govt. PLI Schemes & easy financing options



Offering of Energy Efficient & Compact Designs
 Diversified Product Range
 3 Manufacturing Footprints
 Patents and In-house Design Capabilities

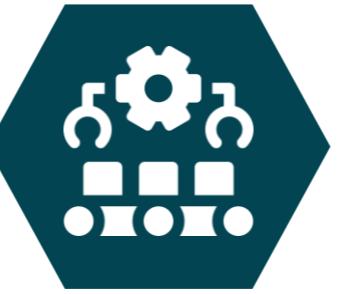
KEY STRENGTHS



Long-Standing Relationships with Established Customers, with Potential to Expand the Customer Base



Among the Key Manufacturers in Fast-Growing RAC & SDA Manufacturing Industries



Advanced Vertically Integrated Manufacturing Operations with Product Portfolio Aimed at Capturing the Full Spectrum of the RAC & SDA Value Chain



Robust Product Development & Design Optimization Capabilities



Experienced Promoters Supported by Senior Management Team with Proven Track Record of Performance



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STRATEGIC OVERVIEW

STRATEGIC GROWTH INITIATIVES



HISENSE

EPACK Manufacturing Technologies Private Limited for **Hisense**

**Air conditioners,
Washing Machines and
appliances**

EPAVO

EPAVO Electricals Private Limited, is a **50:50 partnership** between the Company and **Ram Ratna Group**.

**Brushless DC (BLDC)
motors, HVAC
products, and related
appliances**

Bumjin

Bumjin India Audio Products Private Limited has **Participated in ECMS Scheme**.

**TV Speaker, Sound bar,
AI Speaker, Bluetooth
Speaker, Smart Speaker**

EECPL

Epak Electronic Component Private Limited has **Participated in ECMS Scheme**.

**Manufacturing of
Components as per
ECMS Category**

EDGS LLC- FZ

Epak Durable Global Sales LLC- FZ has been incorporated in UAE to cater the MEA & Export Market.

**Expansion of Foot Print
in MEA Market**

GROWTH INITIATIVES



HISENSE

- Established a strategic partnership with **Hisense**, a global leader in consumer electronics and appliances, to manufacture air conditioners and appliances in India utilizing Hisense's advanced technology.
- Partnership anticipated to **deliver \$1 billion** in incremental revenue over five years.
- Strategic focus on the Indian market, with export potential targeting **SARC and MEA markets** to expand global footprint.
- Establishing** new manufacturing facility for wholly owned subsidiary EMTPL in Sri City, Andhra Pradesh.
- Commercial Production is scheduled to commence in Q4 FY26.
- ODM product supply initiated since March 2025.

JOINT VENTURE

EPAVO

- The joint venture, EPAVO Electricals Private Limited, is a **50:50 partnership** between the Company and Ram Ratna Group.
- It strengthens backward integration in our AC manufacturing by enhancing capabilities in **Brushless DC (BLDC) motors, HVAC products**, and related appliances.
- The JV is well positioned to capitalize on growing demand for energy-efficient and sustainable solutions.
- The greenfield Bhiwadi facility commercial production commenced in Q2 FY 26 as planned.
- In the initial year, the focus will be on production ramp-up, customer validation, and approvals.

New Initiative

- Company has tie-up with Panasonic & Daikin and other RAC manufacturers to produce **PCBA controllers** and **Copper components** for RACs.
- This **Strategic move** will enable the company to enter the EMS business, focusing on the manufacturing of critical components such as PCBA controllers, heat exchangers, CFFs, Copper Parts and molded parts, leveraging the benefits of the PLI scheme.
- Our facilities in Bhiwadi and Sri City will drive this business forward, partnering with industry leaders such as **Panasonic, Daikin**, etc., to optimize capacity and achieve manufacturing excellence.

KEY GROWTH DRIVERS



Growth in the Product Business

Strengthening growth in the **Room Air Conditioner (RAC)** business both Domestic and Exports
Expanding the SDA segment by adding new customers and launching new product categories
Driving volume growth in LDA Segment, Air Coolers, Washing Machine through the onboarding of new customers

Focus Driver Component Segment

Focused on expanding into new market verticals while accelerating growth in existing markets for Component portfolio, including Copper Parts, PCBs, Plastic Molding Components, and Cross Flow Fans (CFFs)—driving sustainable, balanced growth through diversification and core capability leverage.

Production Linked Incentive Scheme (PLI)

BIS Certification Requirement

The program mandated increased domestic Production and Manufacturing competitiveness. We participated in PLI scheme for RACs and components business.. As a result, Domestic Manufacturing is increased due to PLI. We are also participating upcoming ECMS Scheme of GOI.

The mandatory **BIS certification** for RACs, SDA, LDA and key components has created **barriers for imports**, particularly from China and Thailand
Providing a competitive edge and growth opportunity for us as a domestic manufacturer.



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Q3-FY26 PERFORMANCE

FINANCIAL HIGHLIGHTS



Q3-FY26 PERFORMANCE

INR 4,278 Mn
Operating Revenue
13.5% YoY

INR 317 Mn
EBITDA
31.5% YoY

7.41%
EBITDA Margins
102 Bps YoY

INR 26 Mn
Net Profit
4.0% YoY

0.61%
PAT Margins
-5 Bps YoY

INR 0.27/Share
Diluted EPS
3.8% YoY

9M-FY26 PERFORMANCE

INR 13,034 Mn
Operating Revenue
-14.7% YoY

INR 881 Mn
EBITDA
3.0% YoY

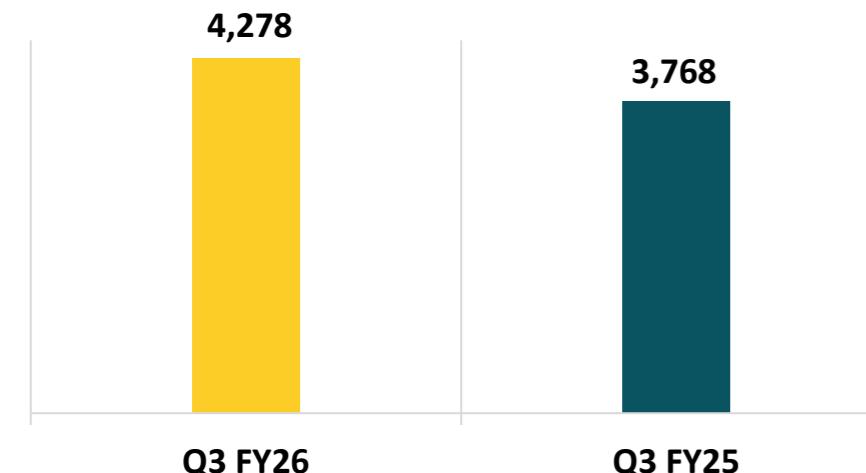
6.76%
EBITDA Margins
116 Bps YoY

INR 32 Mn
Net Profit
-81.6% YoY

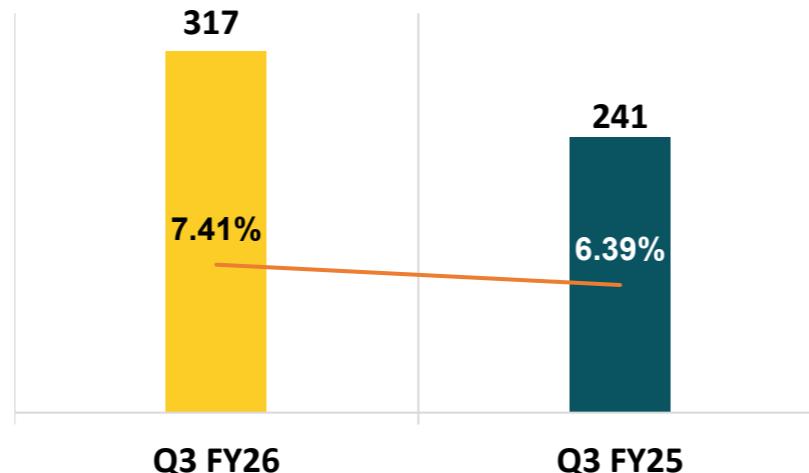
0.25%
PAT Margins
-89 Bps YoY

INR 0.34/Share
Diluted EPS
-81.3% YoY

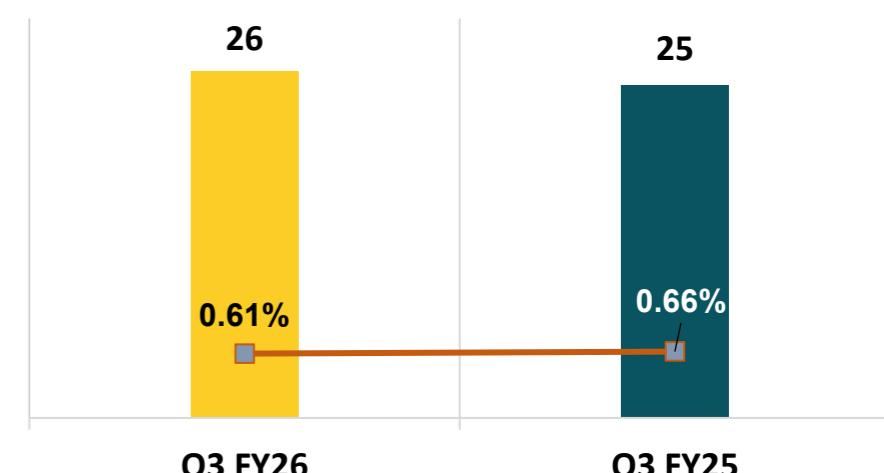
OPERATING REVENUE (INR Mn)



EBITDA (INR Mn) & EBITDA MARGINS (%)



PAT (INR Mn) & PAT MARGINS (%)



OPERATIONAL HIGHLIGHTS Q3-FY26



Operating Revenue grew by 13.5% YoY during the quarter.

- **RAC Segment witnessed a marginal 1% YoY decline during the quarter.**
- **The SDA Segment grew by 30% YoY basis**, driven by healthy order inflow across both existing and newly launched products. Demand for air fryers has been very encouraging and is gaining good traction with customers.
- **The Component Segment reported 61% YoY growth**, supported by a robust order pipeline for PCBs, copper parts, and plastic moulding components
- **The LDA Segment grew by 74% YoY**, with customer base expansion identified as a key strategic growth driver.
- **On New Customer Acquisition** – In Q3, we **secured business with 2 new Customers**, and **supply has been successfully commenced**. With this, our total customer base has been increased to 67 over the first 9 Months of the year, in line with our growth objectives.
- **Component Segment Diversification**- Diversified into the Energy Meter sector by entering the component supply business, expanding beyond the Consumer Durables Industry.

OPERATIONAL HIGHLIGHTS Q3-FY26



The **Product business contributed 75%** of total operating revenue, demonstrating strong market adoption and reaffirming customer confidence in the company's core product portfolio

Strategic Capital Investment by End of Q2 FY26-27					
Location	Investment (Mn INR)	Q1 FY26 (Mn INR)	Q2 FY26 (Mn INR)	Q3 FY26 (Mn INR)	9M FY26 (Mn INR)
EDL Dehradun	200	13	2	27	42
EDL Bhiwadi	1,250	74	356	57	487
EDL Sricity	2,250	244	399	293	936
New Sricity Plant through EMPTL (WOS)	1,000	123	532	65	720
Total	4,700	454	1,289	442	2,185

QUARTERLY FINANCIAL PERFORMANCE



Particulars (INR Mn)	Q3-FY26	Q3-FY25	Y-o-Y	Q2-FY26	Q-o-Q
Operating Revenue	4,278	3,768	13.5%	2,133	100.6%
Expenses	3,961	3,527	12.3%	2,128	86.1%
EBITDA	317	241	31.5%	5	6240.0%
EBITDA Margins (%)	7.41%	6.39%	102 bps	0.23%	718 bps
Other Income	28	49	-42.9%	62	-54.8%
Depreciation	136	121	12.4%	135	0.7%
Interest	135	124	8.9%	202	-33.2%
Profit before share of loss of JV	74	44	68.2%	(270)	-127.4%
Share of loss of JV	(23)	(9)	155.5%	(16)	43.8%
PBT	51	35	45.7%	(286)	-117.8%
Tax	25	10	150.0%	(64)	-139.1%
Profit After tax	26	25	4.0%	(222)	-111.7%
PAT Margins (%)	0.61%	0.66%	-5 bps	(10.41)%	980 bps
Diluted EPS (INR)¹	0.27	0.26	3.8%	(2.32)	-111.6%

1. Not annualised

YTD FINANCIAL PERFORMANCE



Particulars (INR Mn)	9M-FY26	9M-FY25	Y-o-Y
Operating Revenue	13,034	15,276	-14.7%
Expenses	12,153	14,421	-15.7%
EBITDA	881	855	3.0%
EBITDA Margins (%)	6.76%	5.60%	116 bps
Other Income	134	156	-14.1%
Depreciation	398	350	13.7%
Interest	496	402	23.4%
Profit before share of loss of JV	121	259	-53.3%
Share of loss of JV	(43)	(18)	138.9%
PBT	78	241	-67.6%
Tax	46	67	-31.3%
Profit After tax	32	174	-81.6%
PAT Margins (%)	0.25%	1.14%	-89 bps
Diluted EPS (INR)¹	0.34	1.82	-81.3%

1. Not annualised



Expansion of Opportunities and Client Relationship Optimization

The SDA, LDA, and Components segments present substantial growth potential, comprising key product categories such as Air Fryers, Mixer Grinders, Nutri Blenders, Infrared ICT, Vacuum Cleaners, Coffee Makers, and Washing Machines.

The company is focused on strengthening and leveraging established client relationships to effectively meet increasing market demand and enhance market share.

Targeted expansion in the **ODM domain** is prioritized for **Washing Machines**, Mixer Grinders, Air Fryers, Infrared ICT, and Nutri Blenders, reinforcing the company's competitive positioning.

Strategic Growth Drivers

The SDA, LDA, and Components segments are identified as principal growth catalysts, complemented by sustained growth within the RAC segment.

Emphasis on New Customer–New Product (NCNP), New Customer–Existing Product (NCEP), and Existing Customer–New Product (ECNP) strategies is integral to the growth roadmap for FY26.

This strategic framework aims to drive comprehensive business expansion and reinforce cross-segment synergies.

New Client/Segment Acquisitions

Recently added **Energy Meter (Genus)** to the Segment portfolio / customer.

Strategic Capital Expenditure INR 4,500~5,000 Mn.

The Capex will be completed by **End of Q2 FY26 -27** to ramp up the capacities and add new products to cater the market demand for FY27 & Onwards.



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HISTORICAL FINANCIALS

HISTORICAL CONSOLIDATED INCOME STATEMENT



Particulars (INR Mn)	FY22	FY23	FY24	FY25
Operating Revenue	9,242	15,388	14,196	21,709
Expenses	8,554	14,362	13,034	20,133
EBITDA	688	1,026	1,162	1,576
EBITDA Margins (%)	7.44%	6.67%	8.19%	7.26%
Other Income	32	14	89	211
Depreciation	163	261	355	474
Interest	294	315	389	539
Profit before share of loss of JV	263	464	507	774
Share of loss of JV	-	(8)	(15)	(30)
Profit before exceptional item	263	456	492	744
Exceptional Item	-	(16)	-	-
PBT	263	440	492	744
Tax	89	120	138	193
Profit After tax	174	320	354	551
PAT Margins (%)	1.89%	2.08%	2.49%	2.54%
Diluted EPS (INR)	3.47	4.64	4.35	5.76

HISTORICAL CONSOLIDATED BALANCE SHEET



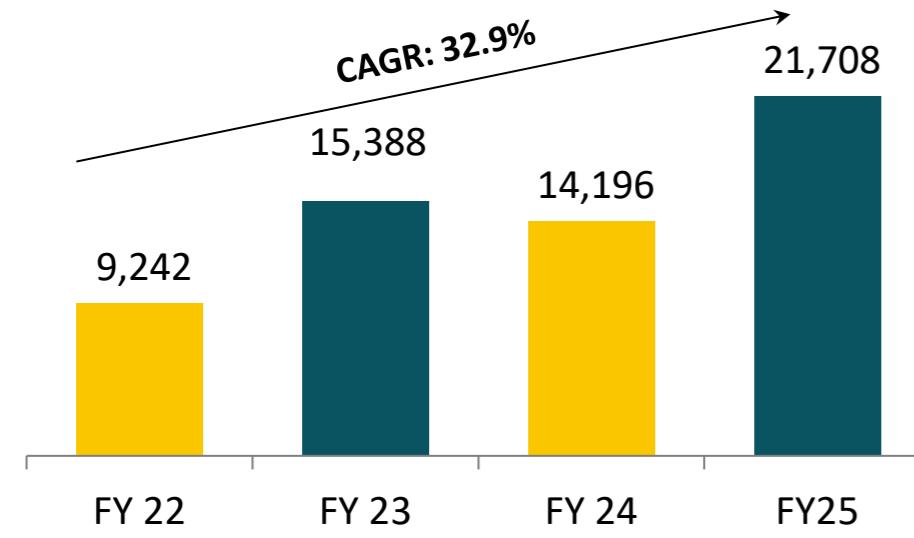
Particulars (INR Mn)	FY23	FY24	FY25	H1 FY26
Equity	3,136	8,922	9,518	9,569
Equity Share Capital	521	958	960	962
Other Equity	2,615	7,964	8,558	8,607
Non-current Liabilities	1,563	1,231	882	1,810
A) Financial Liabilities				
i) Borrowings	1,136	618	326	1,221
ii) Lease Liability	260	387	270	222
B) Provisions	28	38	54	65
C) Deferred Tax Liabilities (Net)	139	188	225	234
D) Other non current liabilities	-	-	7	68
Current Liabilities	9,943	7,525	9,728	8,779
A) Financial Liabilities				
i) Borrowings	3,789	2,696	3,371	5,666
ii) Lease Liabilities	65	160	195	132
iii) Trade Payables	3,891	4,156	5,389	2,364
iv) Other Financial Liabilities	1,917	303	350	359
B) Other Current Liabilities	275	194	402	221
C) Provisions	6	16	21	37
Total Liabilities	11,505	8,756	10,610	10,589
Total Equity And Liabilities	14,642	17,678	20,128	20,158

Particulars (INR Mn)	FY23	FY24	FY25	H1 FY26
Non-current Assets	5,935	7,673	10,053	10,080
A) Property, Plant And Equipment	3,235	5,362	5,450	6,053
B) Capital Work-in-progress	915	266	582	1,486
C) Intangible Assets	2	1	7	6
D) Goodwill	5	5	5	5
E) Right Of Use Assets	951	1,413	1,447	1,385
F) Investments Accounted For Using Equity Method	18	55	168	149
G) Financial Assets				
i) Investments	31	31	31	31
ii) loans	46	46	203	203
iii) Other Financial Assets	20	26	1,702	212
H) Deferred Tax Assets (Net)	-	-	-	5
I) Income Tax Assets (Net)	42	49	50	110
J) Other Non-current Assets	671	419	408	435
Current Assets	8,707	10,005	10,075	10,078
A) Inventories	2,937	3,782	5,807	5,072
B) Financial Assets				
i) Trade Receivables	4,791	2,124	2,981	2,650
ii) Cash And Cash Equivalents	600	1,069	142	116
iii) Bank Balances Other Than Above	154	1	300	300
iv) Other Financial Assets	13	2,389	97	1,052
C) Other Current Assets	212	640	748	888
Total Assets	14,642	17,678	20,128	20,158

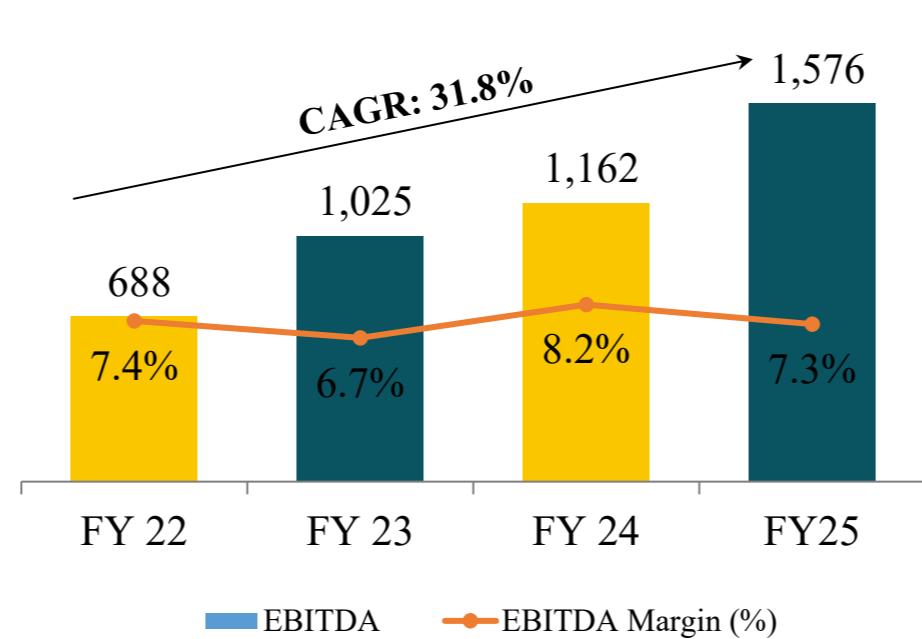
FINANCIAL PERFORMANCE



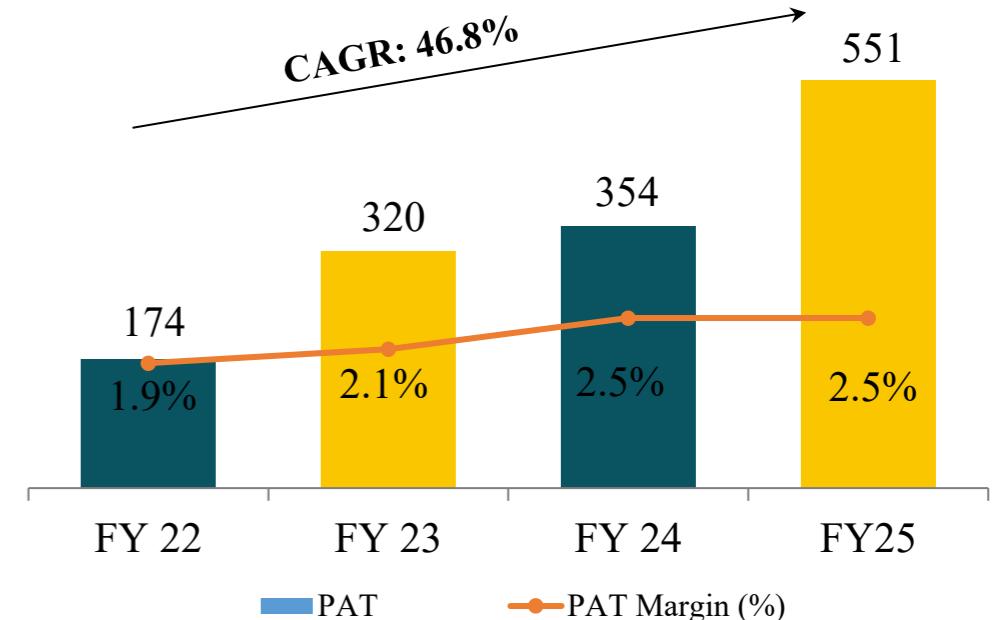
REVENUE FROM OPERATIONS (INR MN)



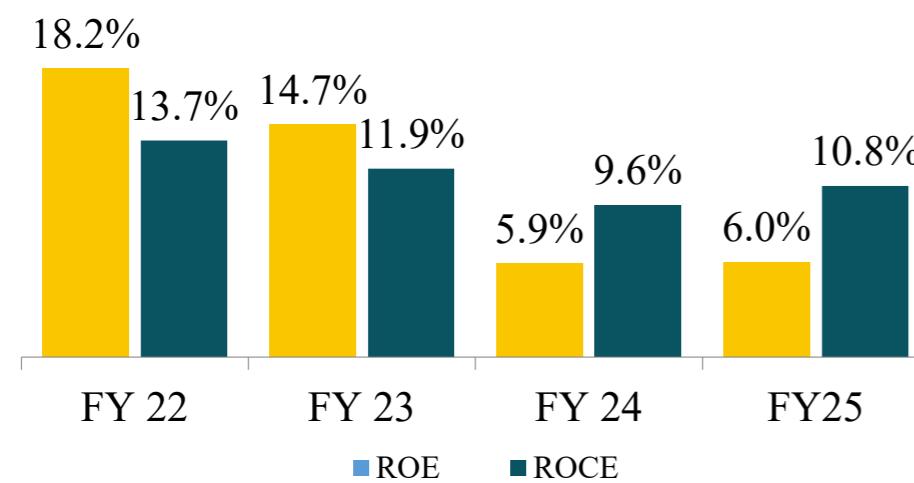
EBITDA & EBITDA MARGIN (INR MN)



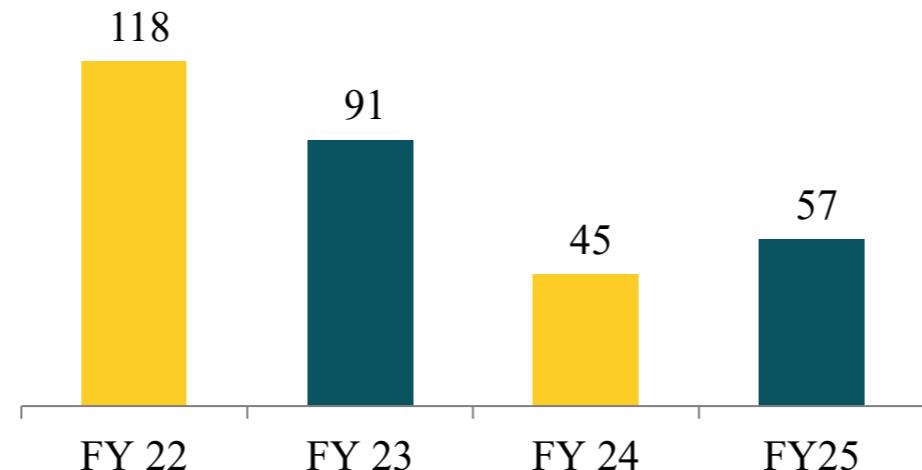
PROFIT FOR THE YEAR & PAT MARGIN (INR MN)



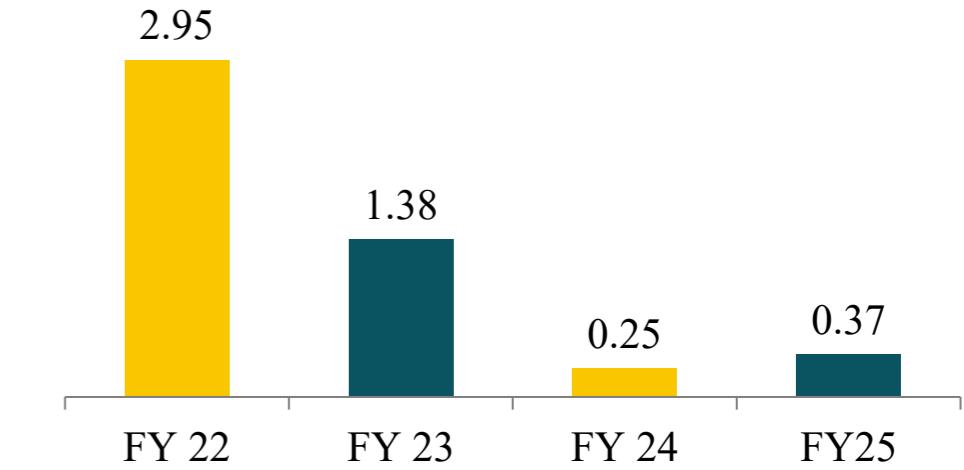
ROE & ROCE (%)



WORKING CAPITAL CYCLE DAYS (IN DAYS)



NET DEBT TO EQUITY RATIO (IN TIMES)





Particulars (INR Mn.) (As a % of Operating Revenue)	Q3 FY25	Q3 FY26	Change %	9M FY25	9M FY26	Change %
Cost of Raw Materials	3,096	3,565	15.1%	12,972	10,949	-15.6%
Employee Expenses	170	168	-1.2%	514	505	-1.8%
Finance Cost	124	135	8.9%	402	496	23.4%
Depreciation & Amortization	121	136	12.4%	350	398	13.7%
Other Expenses	261	228	-13.0%	935	699	-25.2%

Particulars (INR Mn.)	FY25	H1 FY26
Gross Debt	3,697	6,887
Free Cash & Bank Balance	142	116
Net Debt	3,555	6,771
Net Debt/Equity	0.37	0.71

KEY RATIO



Particulars (INR Mn.)	FY 25	H1 FY26
Net Fixed Assets	6,909	7,449
Net Fixed Asset Turns	3.2	2.4
Trade Receivables	2,980	2,650
Trade Receivables Days	50	55
Inventories	5,807	5,072
Inventory Days	98	106
Trade Payables	5,389	2,364
Trade Payable Days	91	49
Cash Conversion Cycle	57	112
Net Worth (A)	9,518	9,569
Gross Debt	3,697	6,887
Cash and Cash Equivalents	142	116
Net Debt (B)	3,555	6,771
Capital Employed (A+B)	13,073	16,340

Net Fixed Asset Turns

(Operating Revenue / Average Net Fixed Assets)

Trade Receivables Days

(Trade Receivables / Operating Revenue) × 365

Inventory Days

(Inventories / Operating Revenue) × 365

Trade Payable Days

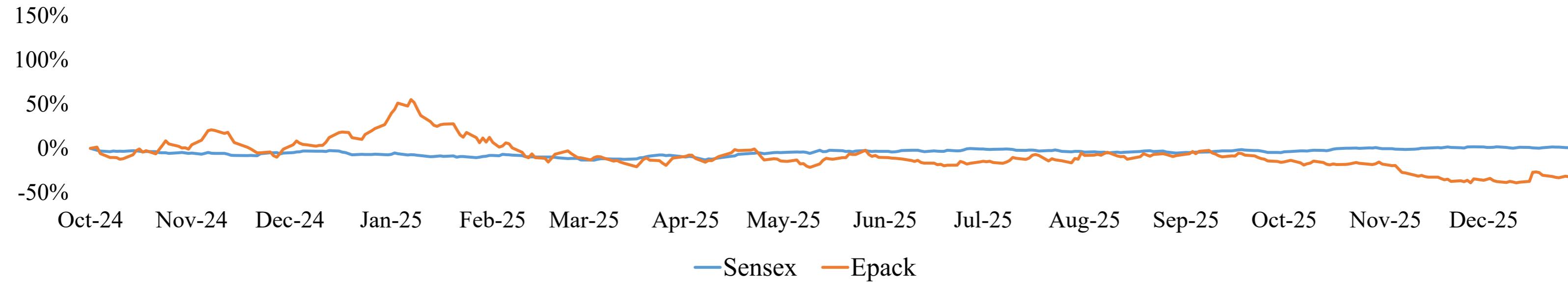
(Trade Payables / Operating Revenue) × 365

Cash Conversion Cycle

Inventory Days + Receivables Days – Payable Days



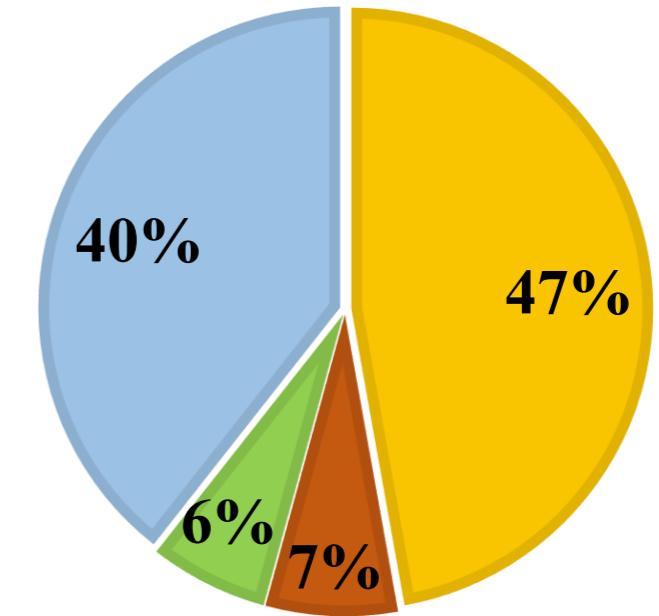
SHARE PRICE PERFORMANCE



MARKET DATA (INR) AS ON 31 st Dec'2025	
Face Value	10
CMP	282.0
52 Week H/L	673.7/ 245.5
Market Cap (INR Mn)	27,136
Shares O/S (Mn)	96
Avg. Volume ('000)	1217.0

SHAREHOLDING PATTERN AS ON 31st Dec'2025

■ Promoters ■ DII ■ FPI ■ Public



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