

# NLC India Limited

*A "Navratna" – Government of India Enterprise*

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## Corporate Presentation

November 2022

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- 1** **Company Overview & Performance Highlights**
- 2** **Financial & Operational Performance**
- 3** **Market Opportunity**
- 4** **Growth Plans**
- 5** **Corporate Social Responsibility**



# Company Overview & Performance Highlights



- ✓ A 'Navratna' CPSE incorporated in 1956. Under the administrative control of Ministry of Coal
- ✓ Paid up Equity Share Capital - Rs. 1,386.64 Crore (GoI holding - 79.20% as on 04.11.2022)
- ✓ Mining , Power Generation and Trading of Power
- ✓ Regional Presence to National Level Presence
- ✓ Advanced Technology
- ✓ Robust Financial Performance in Revenue, Profit and Net worth. Highest domestic credit rating . Consistent track record of Dividend.
- ✓ Skilled Manpower
- ✓ Present Composition of Board - Total 10 Directors (4 Functional Directors including CMD, 2 Government Nominee and 4 Independent Directors).\*

\* Govt. of India has sanctioned totally 16 Directors but present composition of the Board is 10. Ministry of Coal , the Administrative Ministry, has been appraised to fill up for two functional director and four independent directors.

# Board of Directors

			<b>Shri Rakesh Kumar,</b> Chairman-cum-Managing Director Director – HR (Addl.Charge) & Director – Finance (Addl.Charge)		
Part-time Official Director		<b>Shri M. Nagaraju</b> Additional Secretary, Ministry of Coal, GoI.			<b>Shri Ramesh Chand Meena</b> Additional Chief Secretary to Govt. of Tamil Nadu, Energy Department
		<b>Shaji John</b> Director - Power			<b>Shri Mohan Reddy</b> Director - Planning & Projects
Functional Directors		<b>Dr. Suresh Chandra Suman</b> Director - Mines			
		<b>Shri Subrata Chaudhuri</b> Independent Director			<b>Shri Prakash Mishra</b> Independent Director
Independent Directors		<b>Prof. Nivedita Srivastava</b> Independent Director			<b>Shri M.T.Ramesh</b> Independent Director

Note : Composition of the board as on 11.11.2022

# Vision & Mission

## *Vision:*

*To emerge as a leading Mining and Power Company, with social responsiveness accelerating Nation's growth*

## *ESG Vision :*

*To continue to be a socially responsiveness company.*

### Mission

- *Continue to develop and sustain expertise in Power and Mining with focus on growth and financial strength*
- *Be socially responsive, achieve sustainable development and be sensitive to emerging environmental issues*
- *Strive to achieve excellence in processes and practices*
- *To nurture talent, encourage innovation and foster collaborative culture*

### *ESG Mission*

- *To play an active role in society and be sensitive to emerging environment issues.*

### Values

*N- National Orientation*

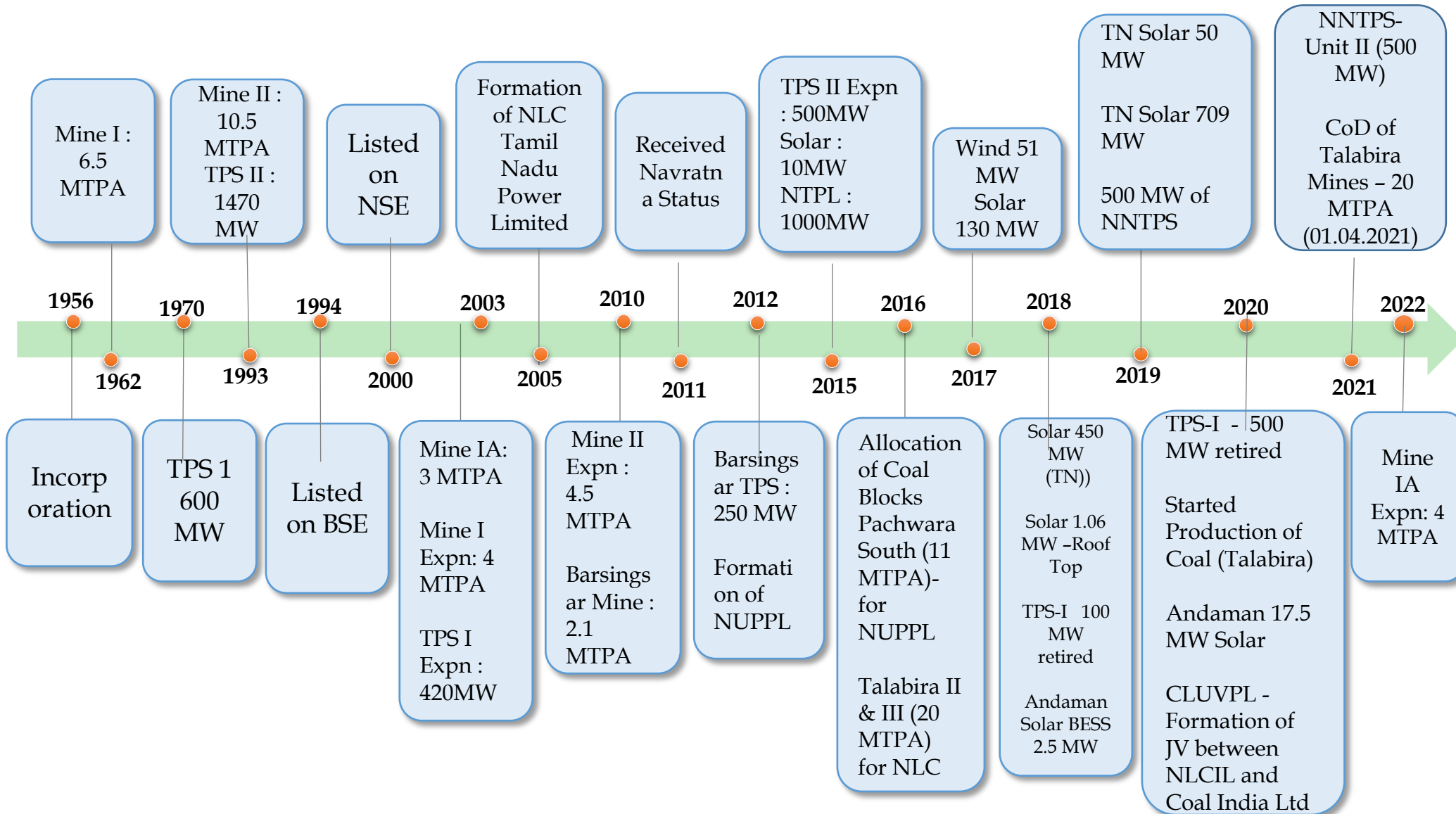
*L - Learning and Development*

*C- Commitment for Excellence*

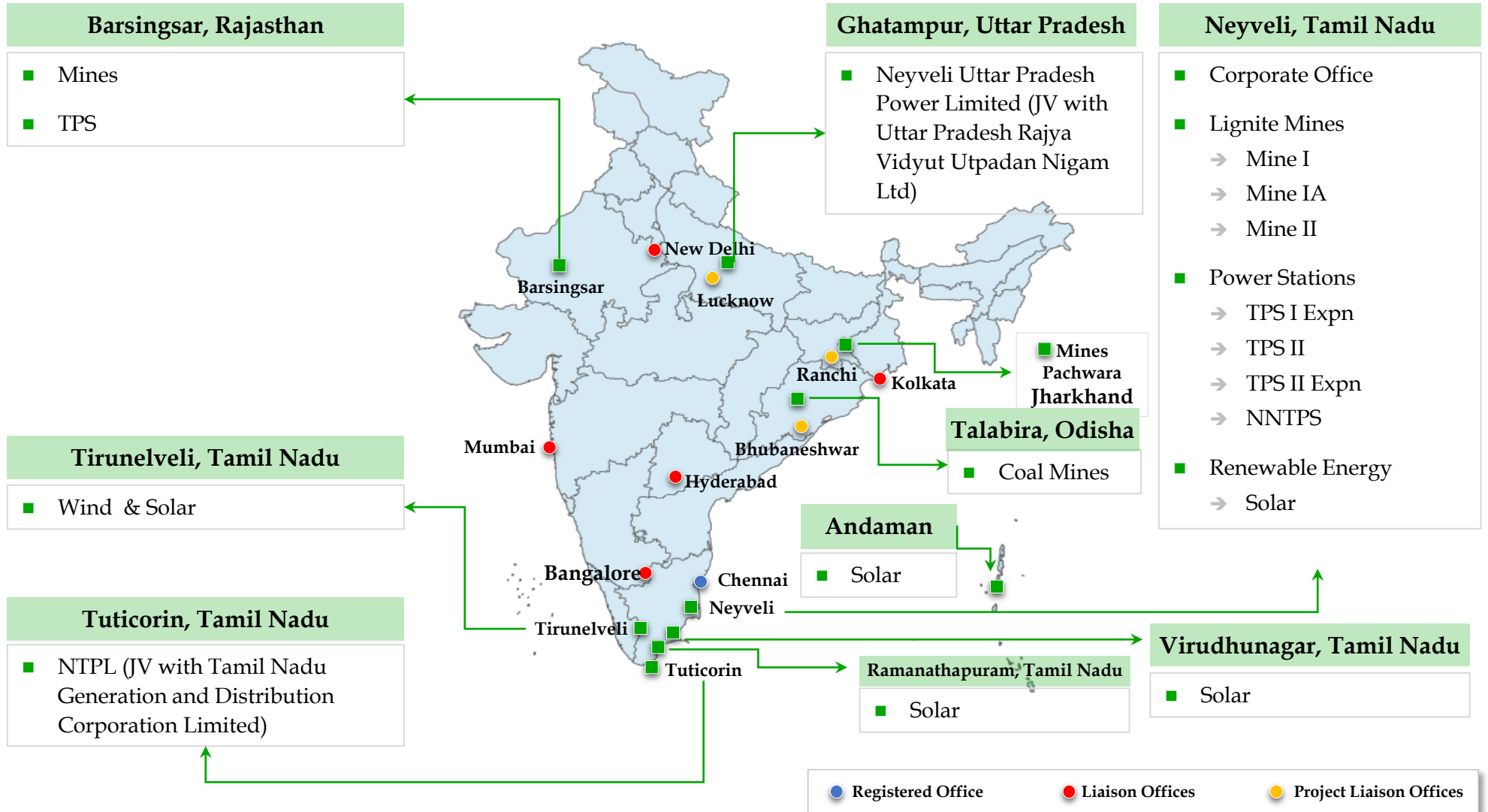
*I - Innovation and Speed*



# Evolution & Key Milestones





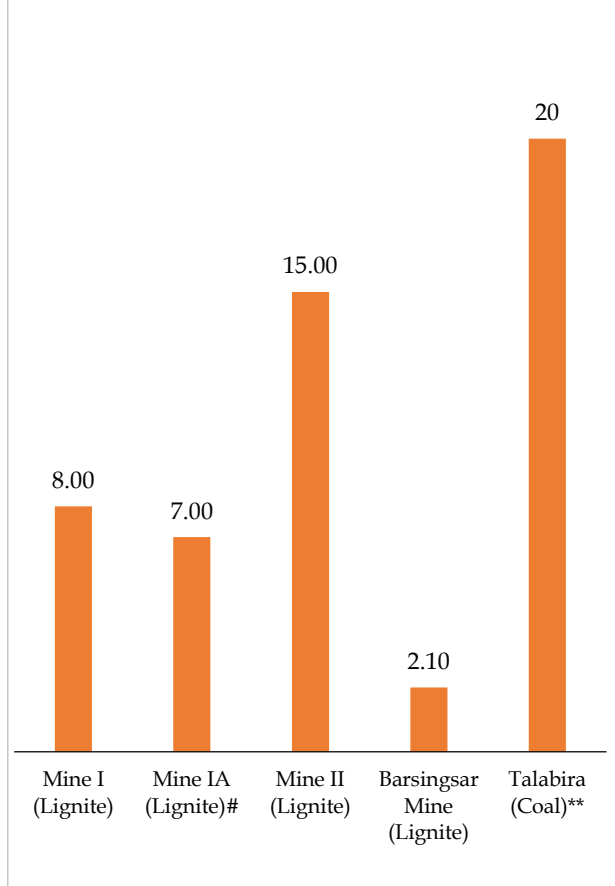


Note:- Map not to scale;

TPS = Thermal Power Station.

## Mining

**Total Mining Capacity - 52.10 MTPA\***



Note : Source from NLCIL Annual Reports and figures representing NLCIL Standalone financial statements

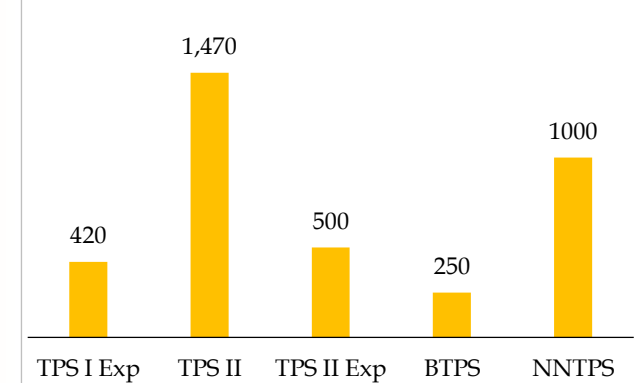
\*Existing Capacity as on 31.10.2022.

\*\* CoD of Talabira Coal Mines is on 01.04.2021 Achievement of Full Capacity expected by Jan 2027

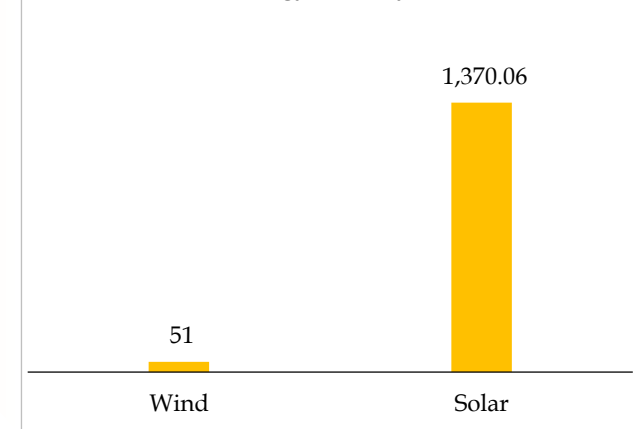
# CoD of Mine IA Exp is on 01.04.2022 and achievement of full capacity of 4 MTPA expected by 2028

## Power Generation

**Thermal Power Station - Capacity 3,640MW\***



**Renewable Energy Capacity 1421.06 MW\***

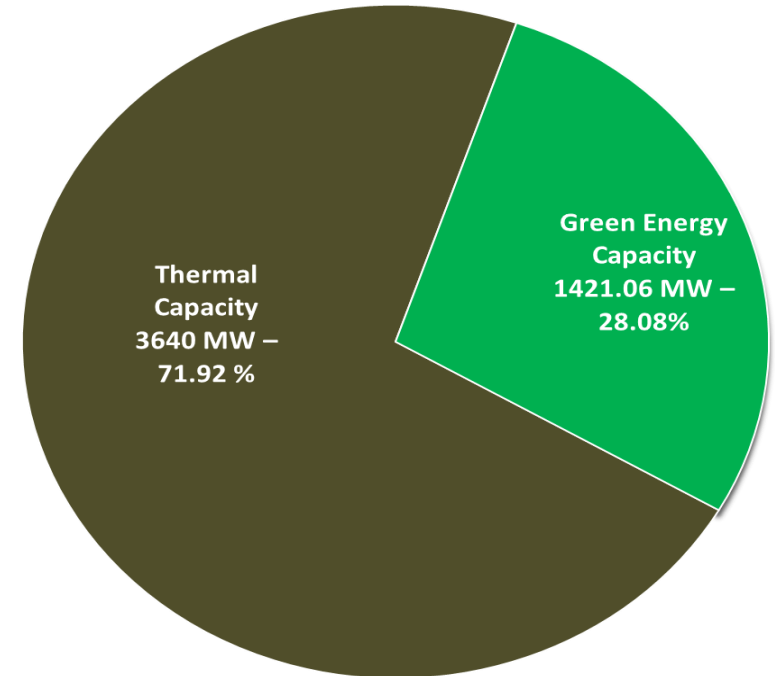
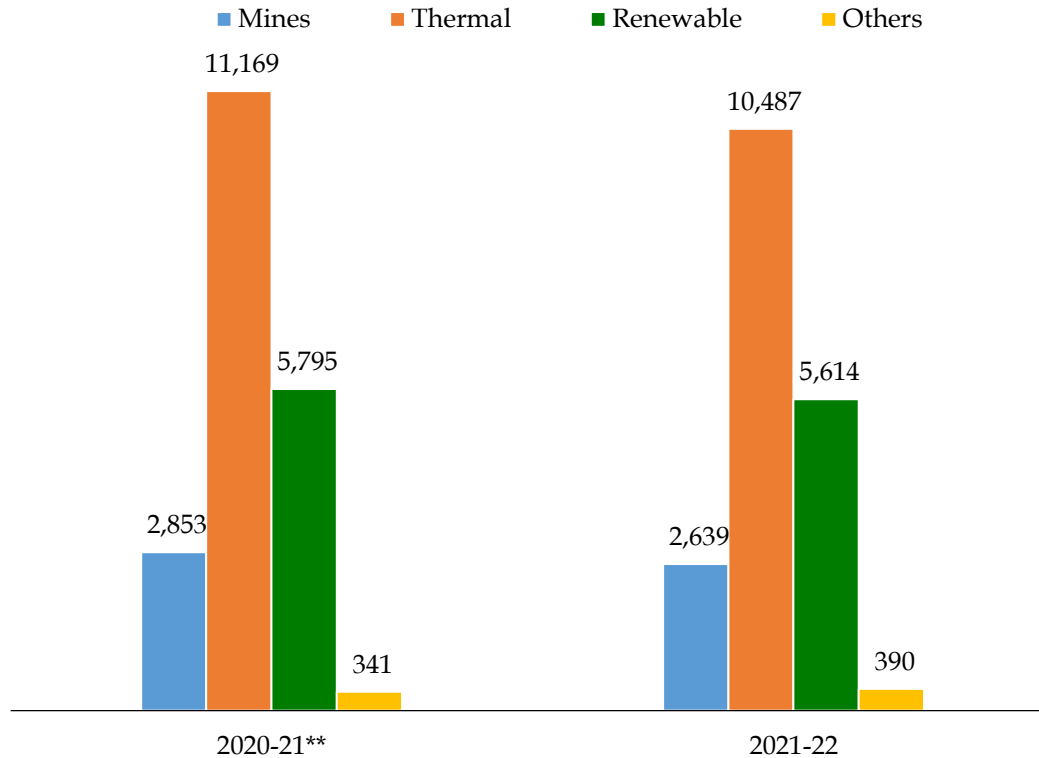


# Segment Investments & Green Portfolio

Net Book Value\*

Rs in Crore

Installed Generation Capacity#



\*Note : Source from NLCIL Financial Results / Annual Reports and figures representing NLCIL Standalone as on 31<sup>st</sup> March'2022

\*\* Restated

#As on 30.06.2022

## Expertise in Open Cast Mining & Power Generation

### Mining

- Vast experience in operation, maintenance and project management and consultancy in open- cast mining
- Asset bank of specialised mining equipments for open cast mining:
  - German excavation technology
  - 31 Bucket Wheel Excavators
  - 5 Reclaimers
  - Conveyor length – 110.02 KMs

### Power Generation

- Experience in operating lignite based thermal power station and consultancy in Renewable power project.
- Average of all thermal stations PLF are running at higher PLF than All India average PLF.
- NLCIL is the 1<sup>st</sup> Company has crossed 1 GW of renewable energy, which is highest ever achieved by any CPSE.

## Lignite / Coal Resources for Captive Consumption

- Captive fuel source with power plants located at the pit heads of Lignite mines
- Greater flexibility in terms of adjusting the lignite production to adjust for variations in power demands and power generation at thermal power plants
- Out of total measured lignite reserves of 7374.10 Million Tonne in India as on 31.03.2021 Neyveli Lignite Field, Barsingsar, Bithnok and Hadla of NLCIL accounts for 5163.17 Million Tonne which is about 70%.
- Coal from Talabira is presently transferred /sold to NTPL, NTPC and Open sales
- Talabira Coal mines Production in FY 2021-22 is 63.58 MT

## Lignite / Coal Mining of NLCIL

- All India Lignite production during 2020-21 is 36.61 Million Tonne. Out of the same NLCIL share is 19.26 Million Tonne, which is 52.61 % as compared to 59.07% in FY 2019-20.
- Operating the Talabira Coal mine through MDO Mode with target of attaining full rated capacity by 2027-28

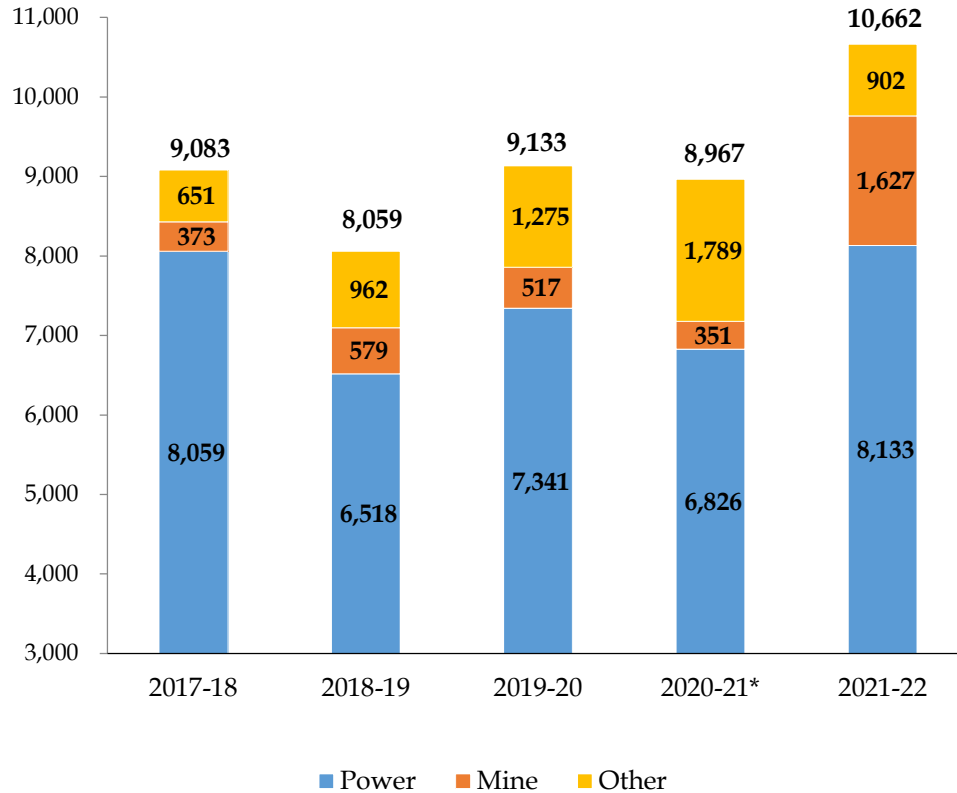


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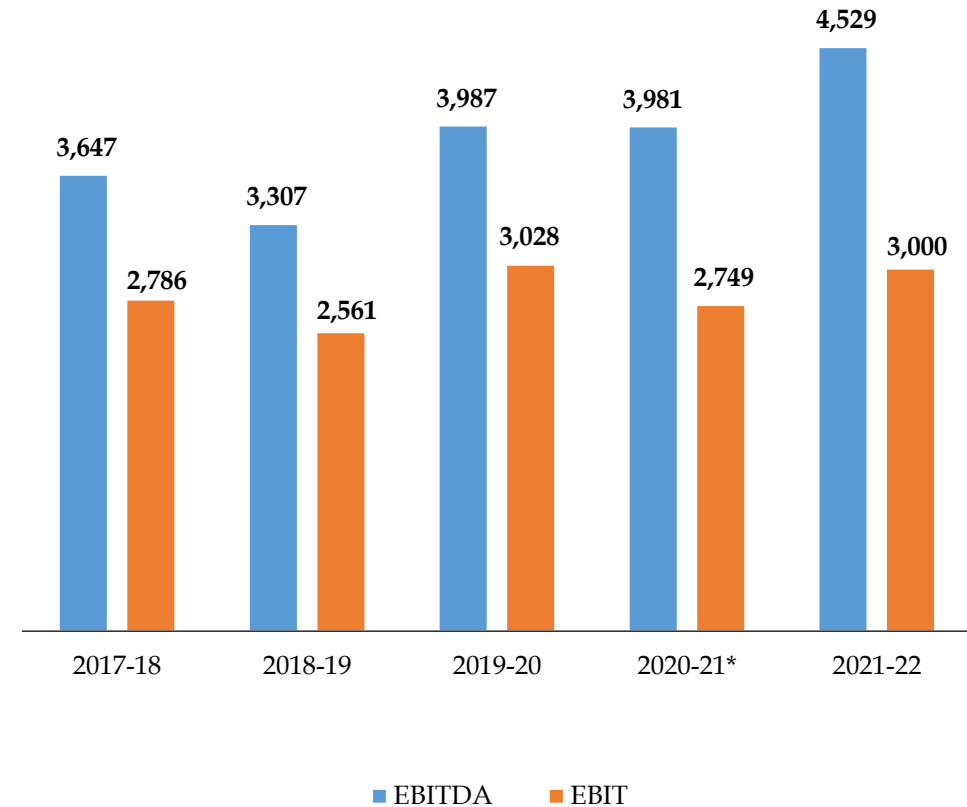
# Financial & Operational Performance

# Financial Performance

**Total Income (Rs in Crore)**



**EBITDA & EBIT^ (Rs in Crore)**

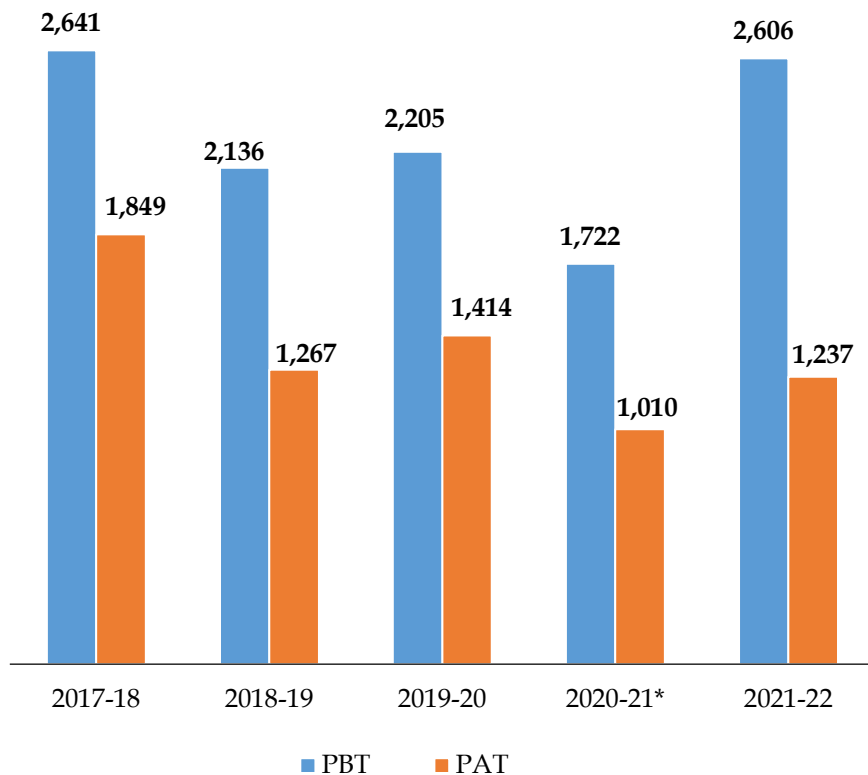


\* Restated 2020-21

^ EBITDA, EBIT computed considering Net Movement in Regulatory Expenses / Income and without considering Exceptional Item.

Note : Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone;

## # PBT & PAT (Rs in Crore)



## Key Financial Ratios

	2017-18	2018-19	2019-20*	2020-21*	2021-22
OPM^ (%)	26.04	20.58	22.99	13.65	21.66
NPM (%)	20.35	15.72	15.57	11.27	11.60
ROCE (%)	12.16	8.28	9.85*	9.10	11.29
RONW (%)	14.07	10.22	11.92*	7.86	9.03
Current Ratio	1.76	1.12	1.22	1.23	1.75
Quick Ratio	1.47	0.94	1.06	1.06	1.49

\* Restated financials as at 01.04.2020 and FY 2020-21

^ OPM computed considering Net Movement in Regulatory Expenses/Income and without considering Exceptional Item.

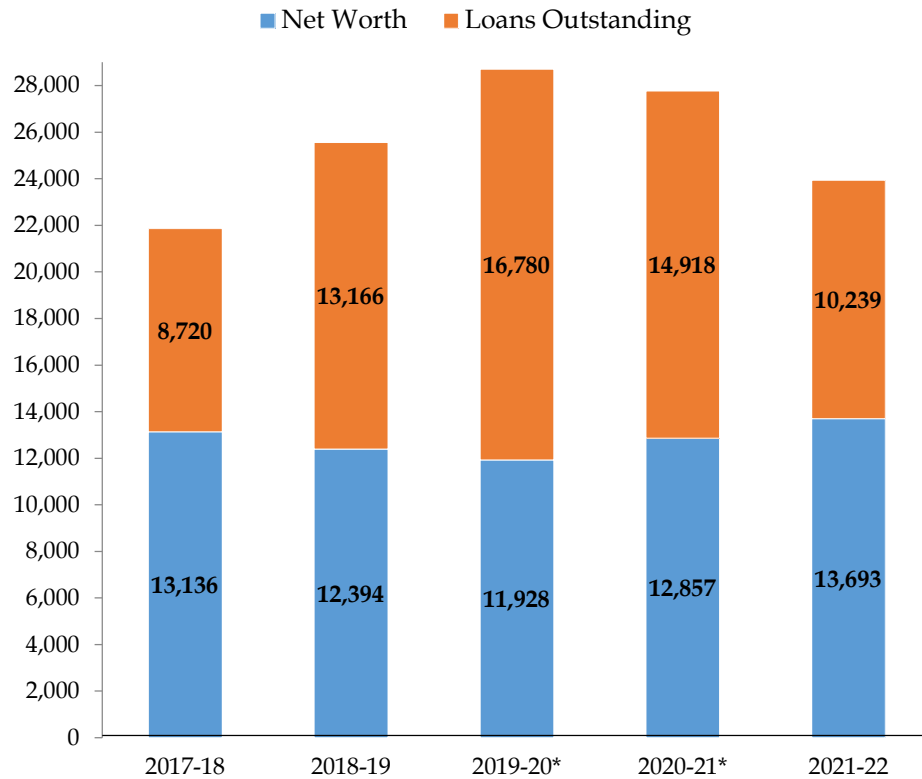
# PBT considering Net Movement in Regulatory Deferral Income/Expenses.

ROCE is EBIT without Exceptional/ Capital Employed

Note : Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone;



## Networth & Loans Outstanding (Rs in Crore)



## Credit Ratings (Long Term Borrowings)

Agency	Rating
CRISIL	AAA/Stable
ICRA	AAA/Stable
CARE	AAA/Stable
Brickwork	AAA/Stable
India Rating	AAA/Stable

## Credit Ratings ( Commercial Paper)

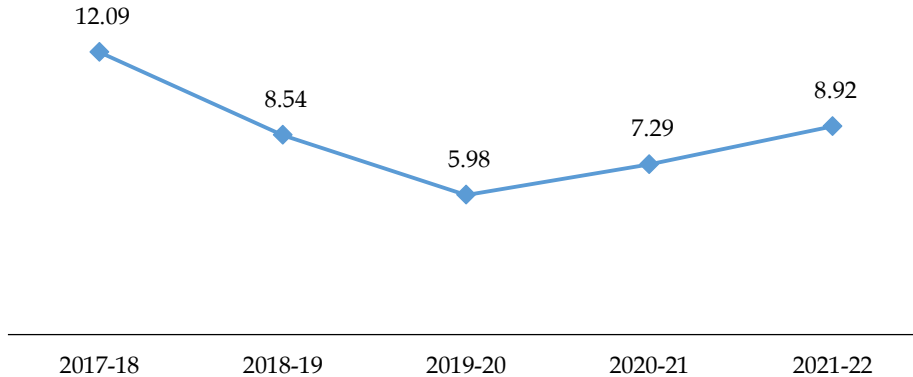
Agency	Rating
CARE	A 1+
India Rating	A 1+

Note : Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone as on 31<sup>st</sup> March'2022

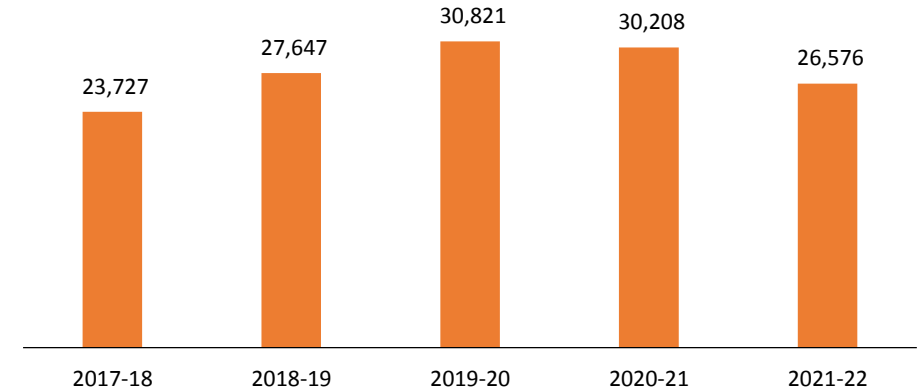
\* Restated financials as at 01.04.2020 and FY 2020-21

# Financial Performance

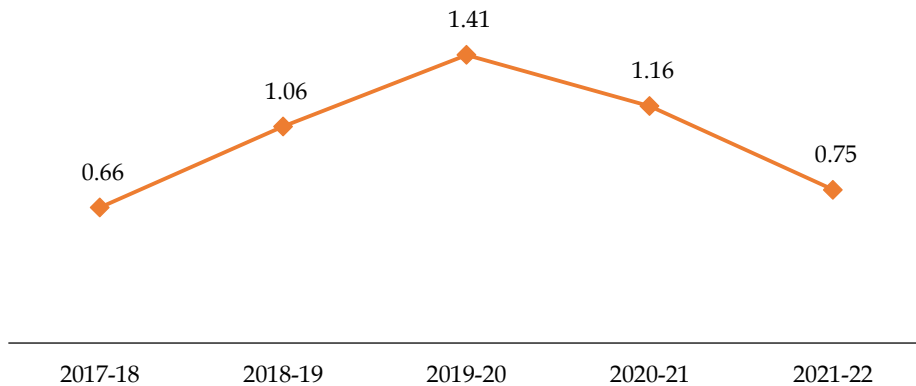
## Earnings Per Share\* (Rs.)



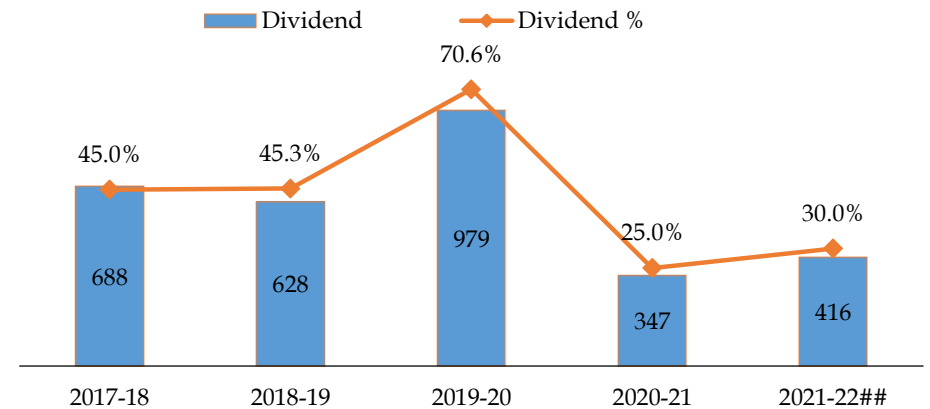
## #Capital Employed\* (Rs in Crore)



## Debt-Equity ratio\*



## Dividend Trend (Rs in Crore)



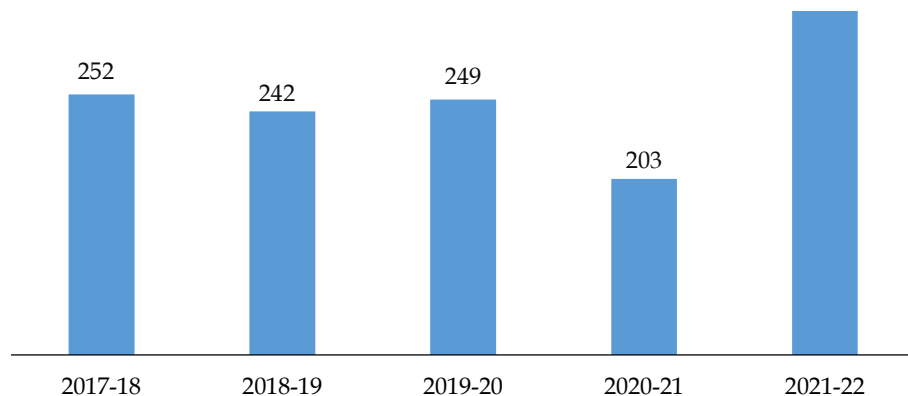
\*Restated FY : 2020-21

## Board has recommended final dividend @ 15% subject to approval at AGM.

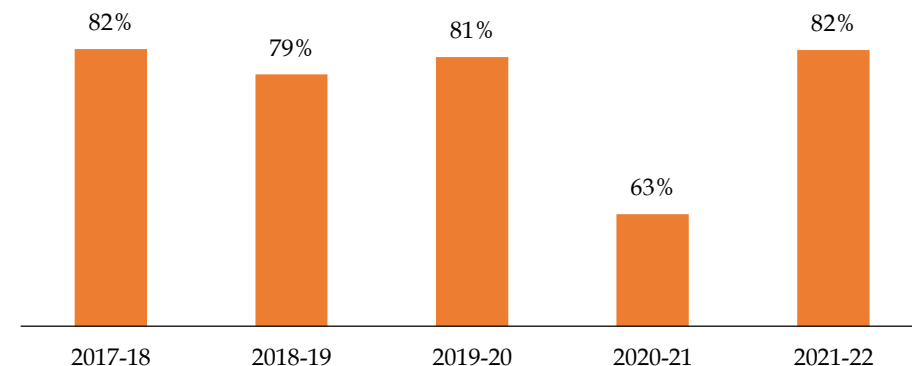
# Capital employed is tangible net worth plus outstanding borrowings and DTL less Intangible Assets

Note : Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone

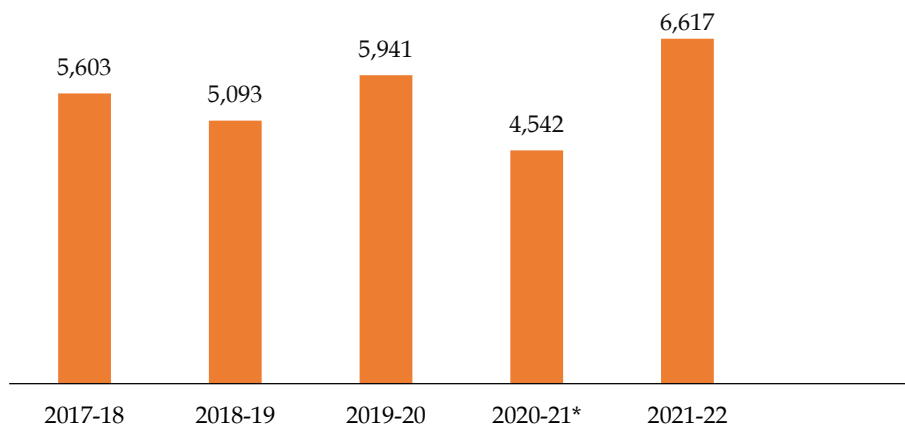
**Lignite & Coal Production \*\* (LT)**



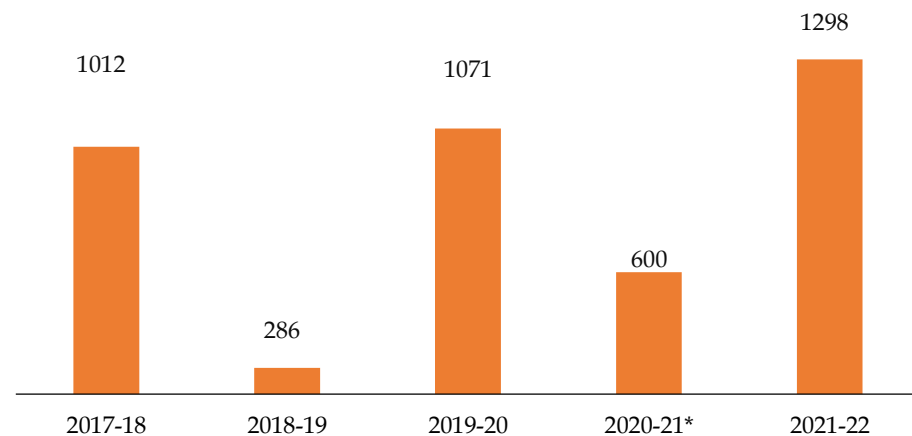
**#Capacity Utilization (%)**



**Revenue (Rs in Crore)**



**Segment Results (Rs in Crore)**



\*Restated financials as at 01.04.2020 and FY 2020-21

\*\* includes coal production of 10.13 LT in FY:2020-21 & 63.58 LT in FY:2021-22

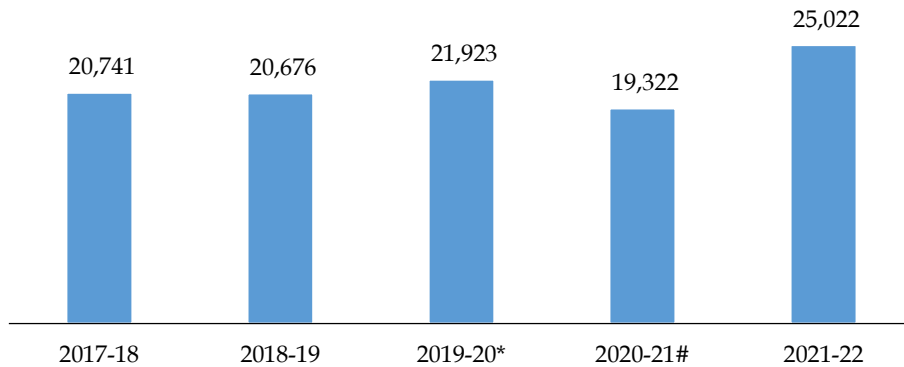
# Capacity utilisation for Lignite mines

Note : Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone financial statements

# Operational Performance – Power Segment

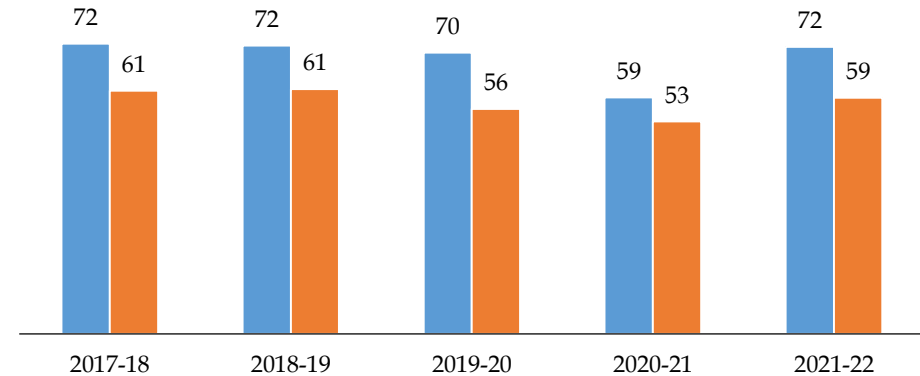
## Power Generation (MU)

■ NLCIL

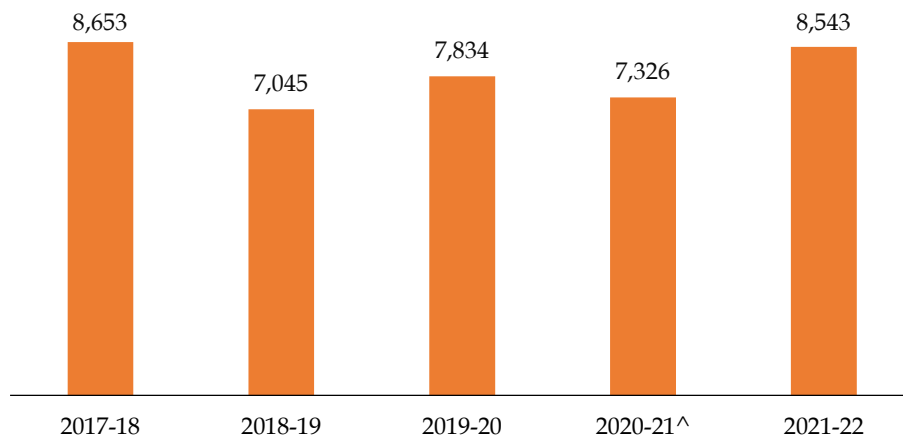


## PLF (%) Comparison - Thermal

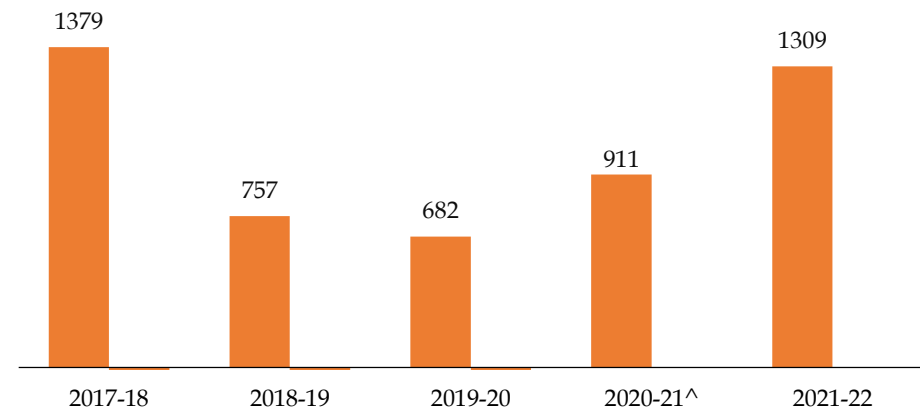
■ NLCIL ■ All India



## Revenue from Operations (Rs in Crore)



## Segment Results (Rs in Crore)



\* Includes infirm power of NNTPS Unit-I and 709 MW Solar

#Includes infirm power of NNTPS Unit II

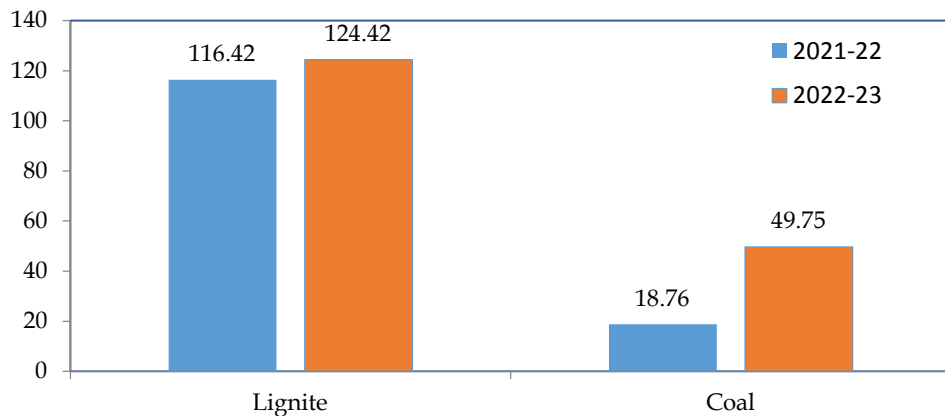
Source: Standalone Financial Results FY 2021-22

^ Restated FY:2020-21

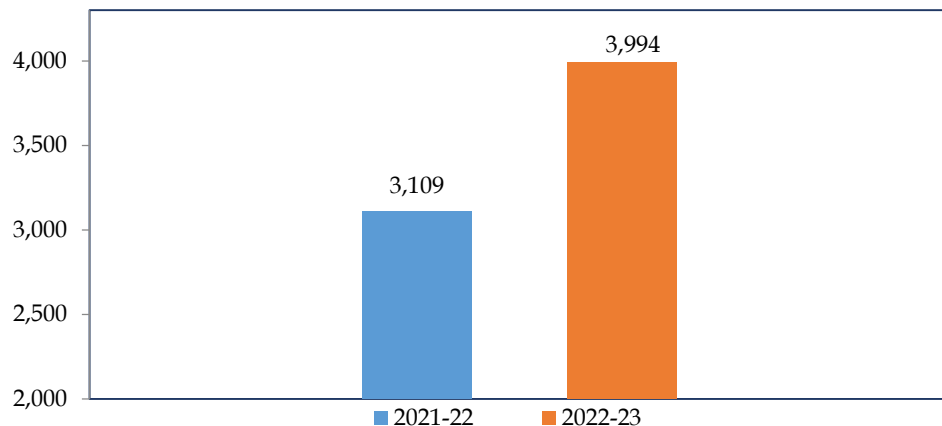
# H1 - Standalone Performance-Segment (2021-22 Vs.2022-23)

## Mining

### Lignite and Coal Production (LT)\*

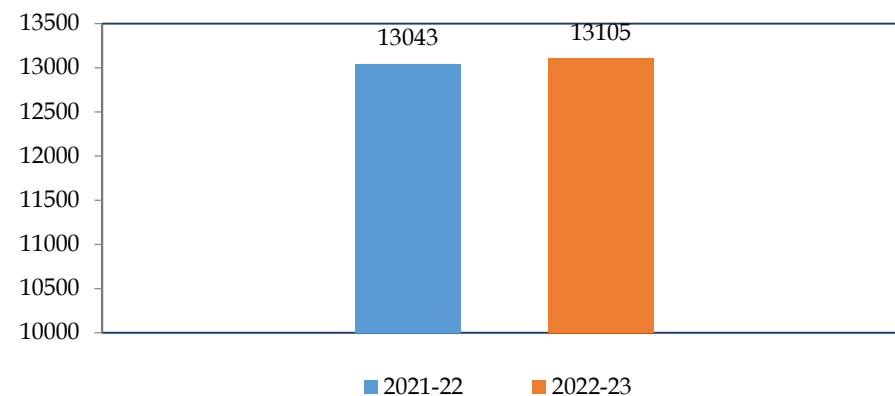


### Revenue (Rs in Crore)

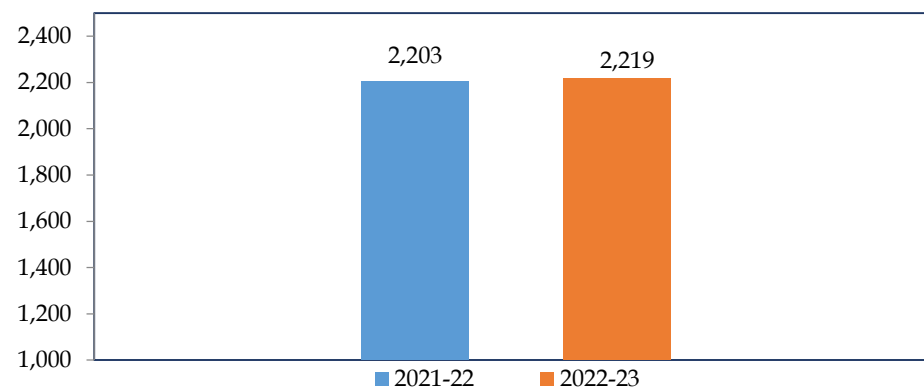


## Power

### Power Generation (MU)

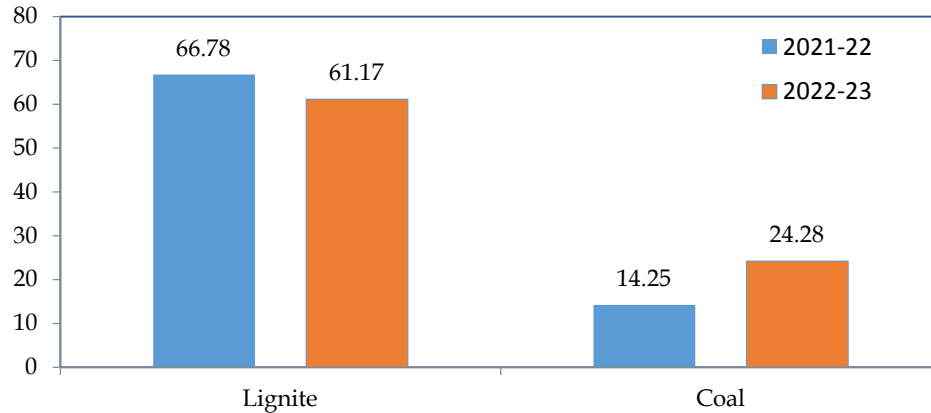


### Revenue (Rs in Crore)

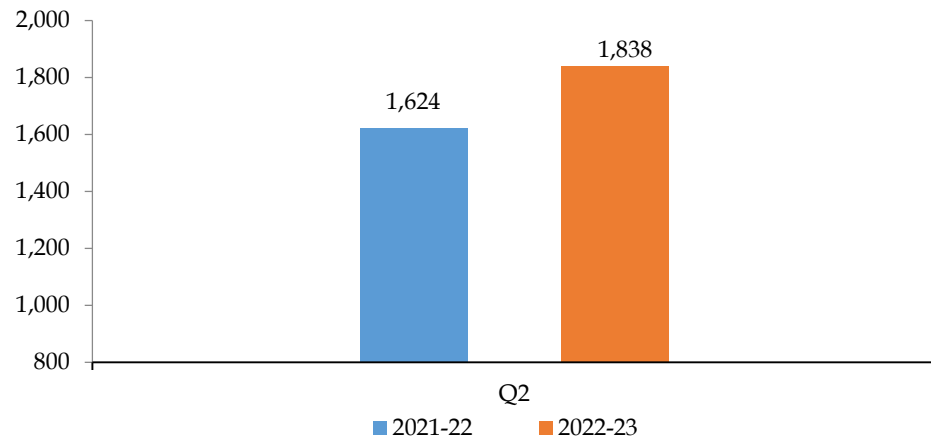


## Mining

### Lignite and Coal Production (LT)

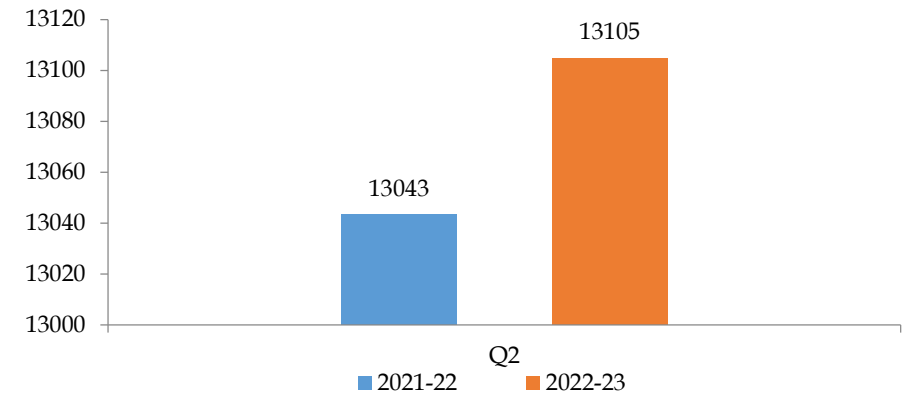


### Revenue (Rs in Crore)

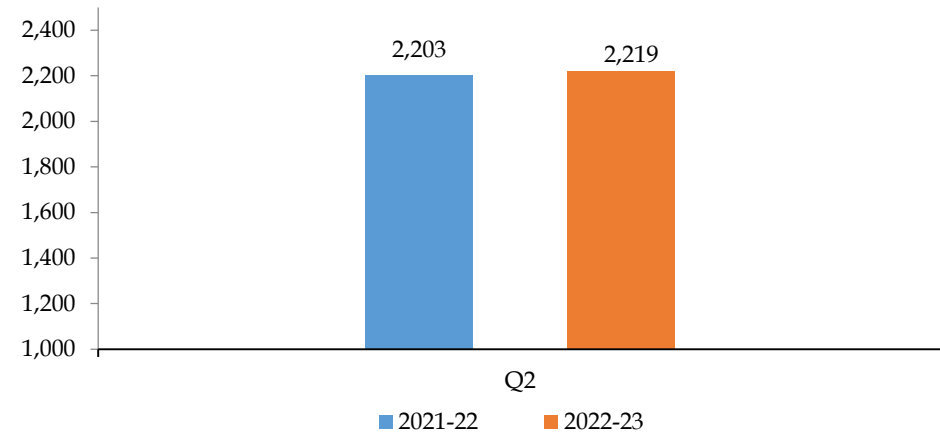


## Power

### Power Generation (MU)

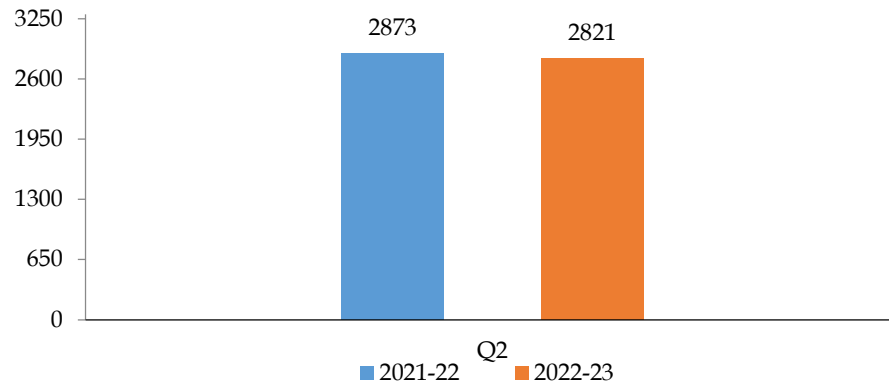


### Revenue (Rs in Crore)

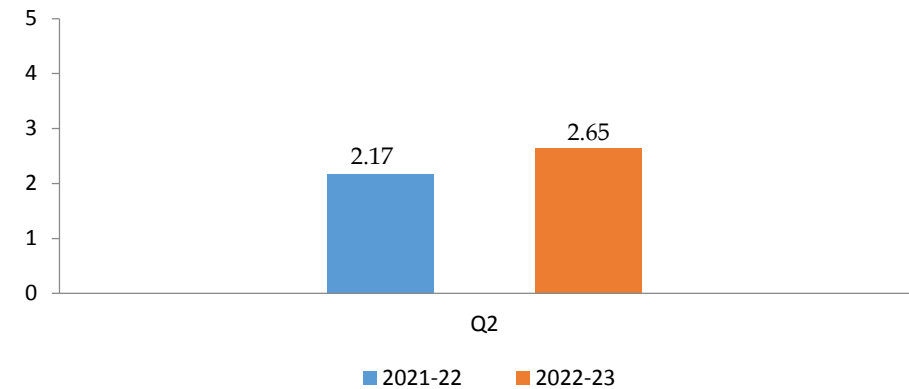


# Quarter 2 Standalone Performance - (2021-22 Vs. 2022-23)

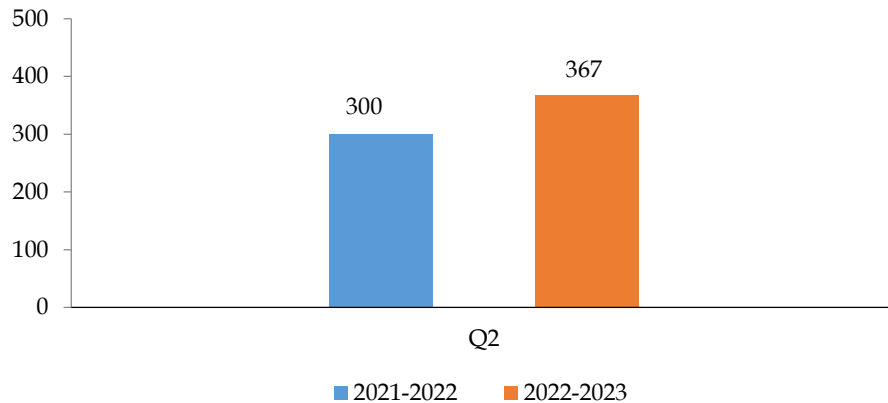
**Total Income (Rs in Crore)**



**Earning Per Share (Rs.)- EPS**



**Profit After Tax (Rs in Crore)**



**Quarterly Income Statement (Rs in Crore)**

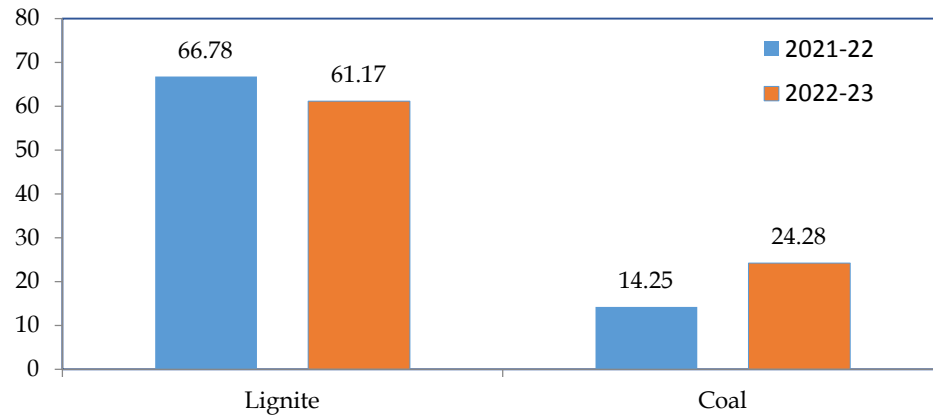
Particulars	Dec-21	Mar-22	Jun-22	Sep-22
Total Income	2509.59	2775.67	3176.54	2821.14
EBITDA *	946.55	1184.99	1270.21	1126.93
EBITDA Margin (%)	37.72%	42.69%	39.99%	39.95%
PAT	229.62	439.73	506.08	367.21
PAT Margin (%)	9.15%	15.84%	15.93%	13.02%

\* EBITDA computed considering Net Movement in Regulatory Expenses/Income and without considering Exceptional Item.

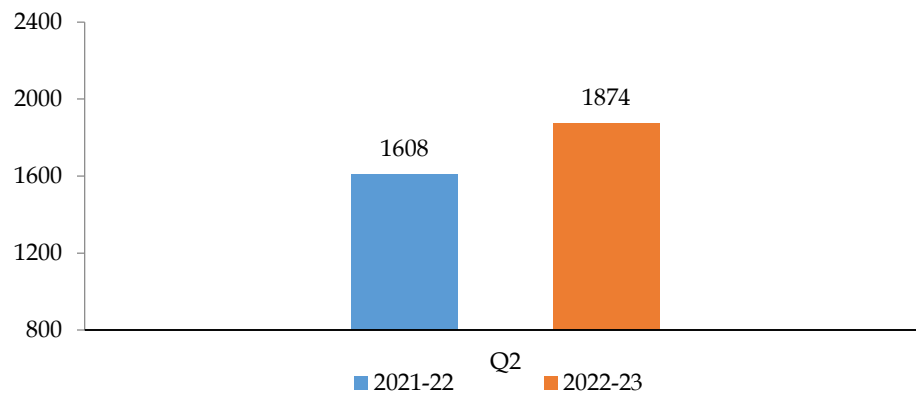


## Mining

### Lignite and Coal Production (LT)\*

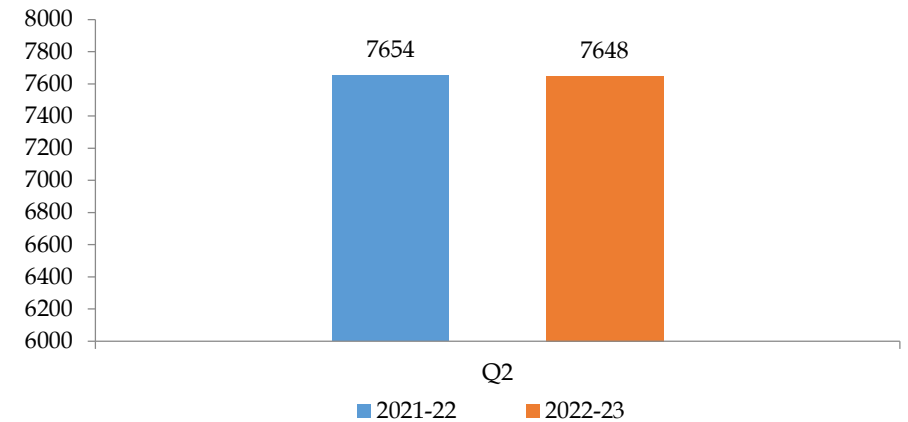


### Revenue (Rs in Crore)

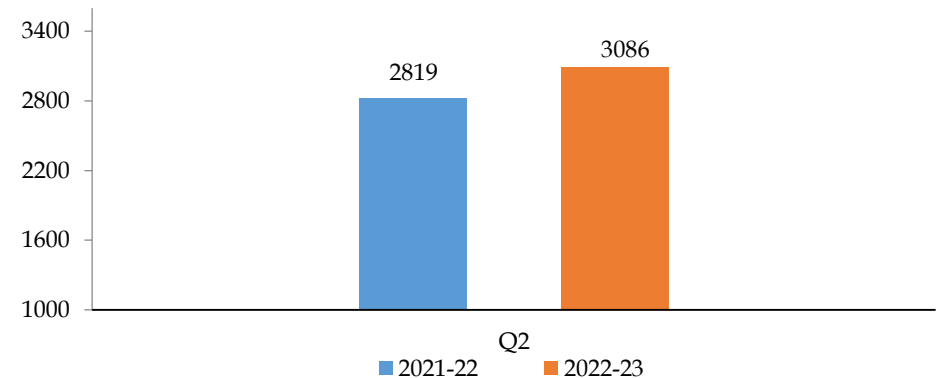


## Power

### Power Generation (MU)

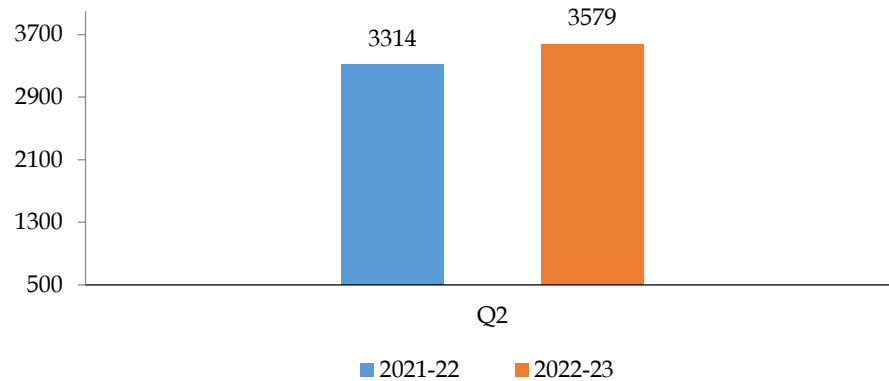


### Revenue (Rs in Crore)

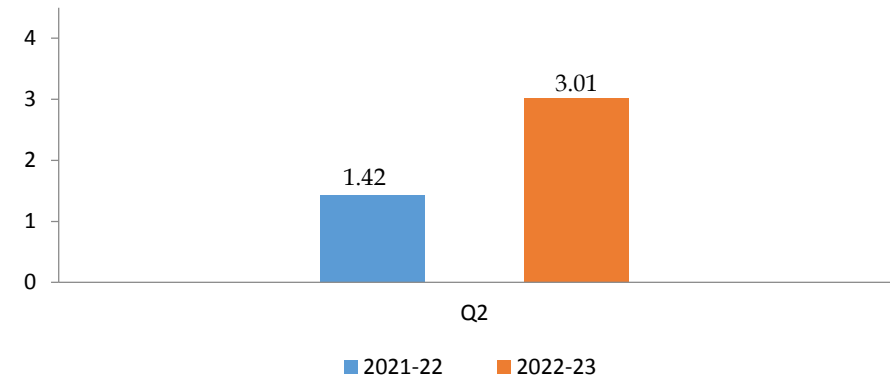


# Quarter 2 Consolidated Performance - (2021-22 Vs. 2022-23)

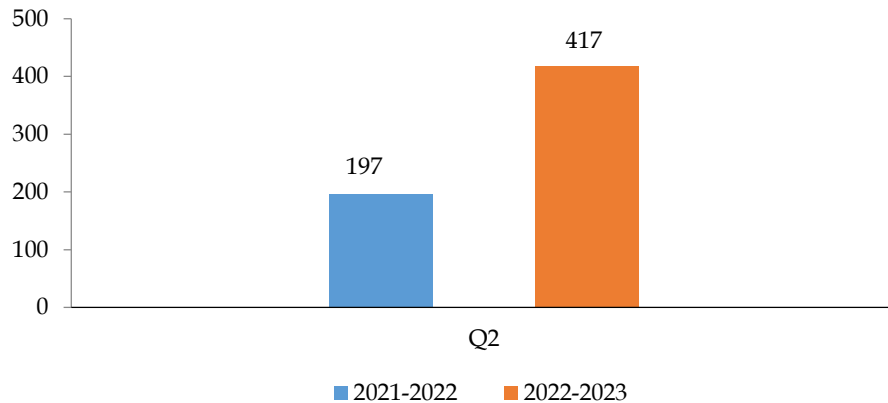
## Total Income (Rs in Crore)



## Earning Per Share (Rs.)- EPS



## Profit After Tax (Rs in Crore)

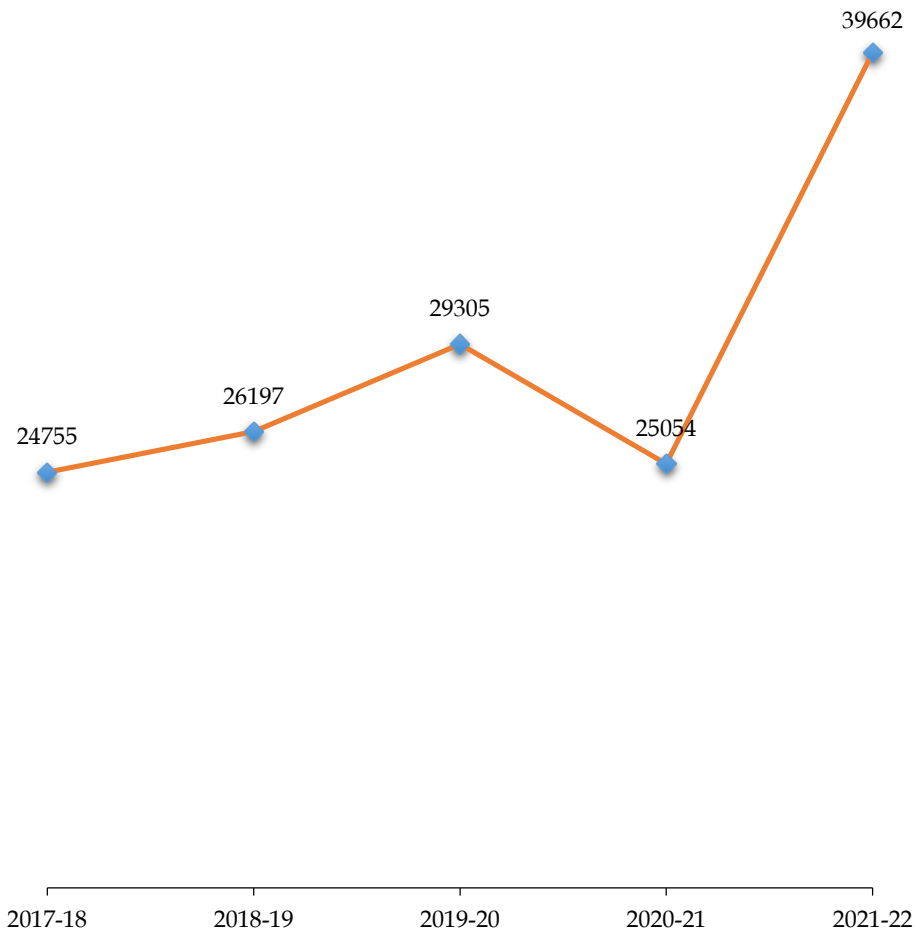


## Quarterly Income Statement (Rs in Crore)

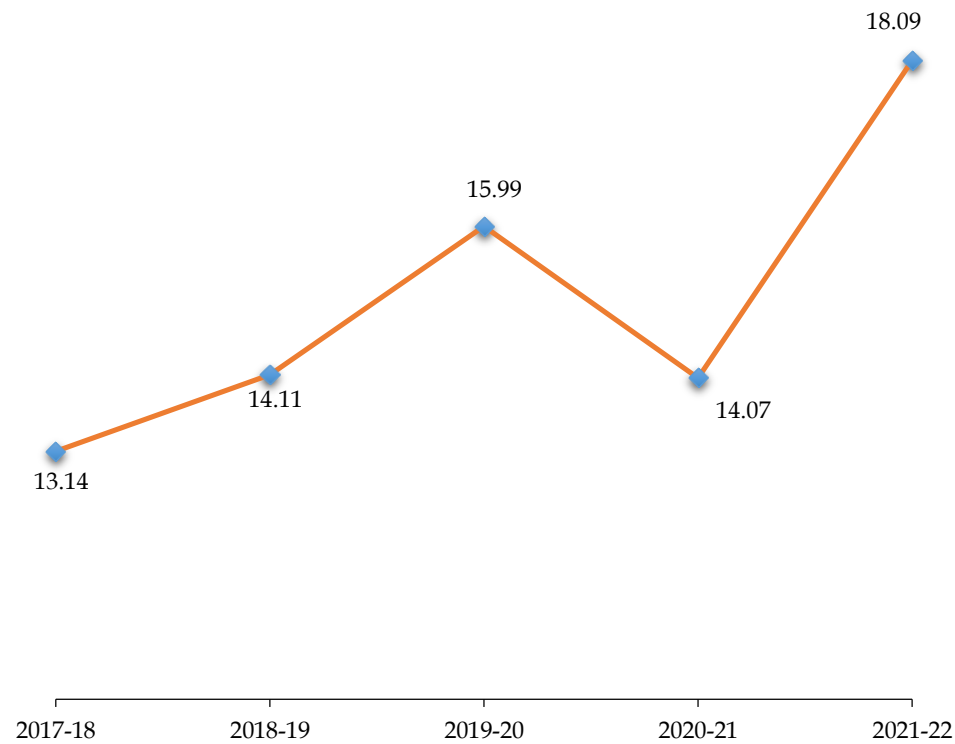
Particulars	Dec-21	Mar-22	Jun-22	Sep-22
Total Income	2845.08	3165.36	3966.01	3579.15
EBITDA *	1080.75	1261.09	1511.14	1386.75
EBITDA Margin (%)	37.99%	39.14%	38.10%	38.75%
PAT	229.88	357.54	568.83	417.03
PAT Margin (%)	8.08%	11.10%	14.34%	11.65%

\* EBITDA computed considering Net Movement in Regulatory Expenses/Income and without considering Exceptional Item.

## Output per Man Shift - Power (KWhr)\*



## Output per Man Shift - Lignite (in Tonne)\*

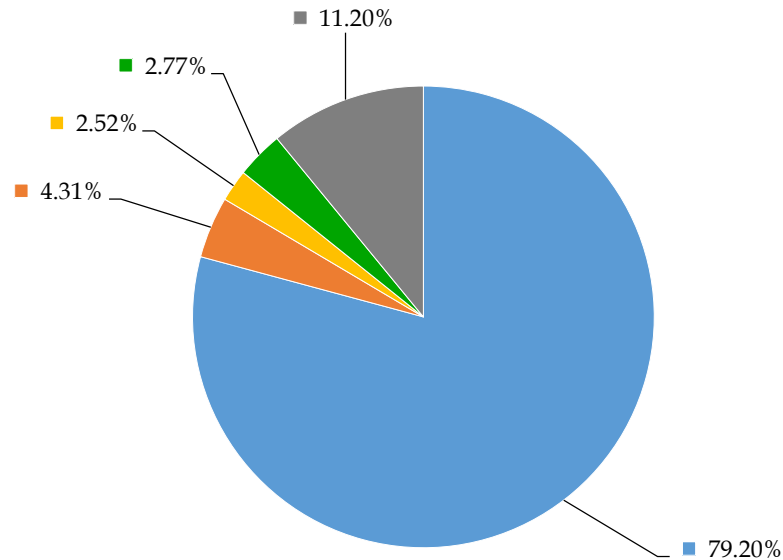


\* Source from NLCIL Financial Results & Annual Reports and figures representing NLCIL Standalone



## Market Opportunity

## Shareholding Pattern\*



**Total No. of Shares - 138,66,36,609**

- Govt. of India
- State Govt. Sponsored Institutions
- Mutual Funds, Financial Institutions & Banks
- Insurance Companies
- Others

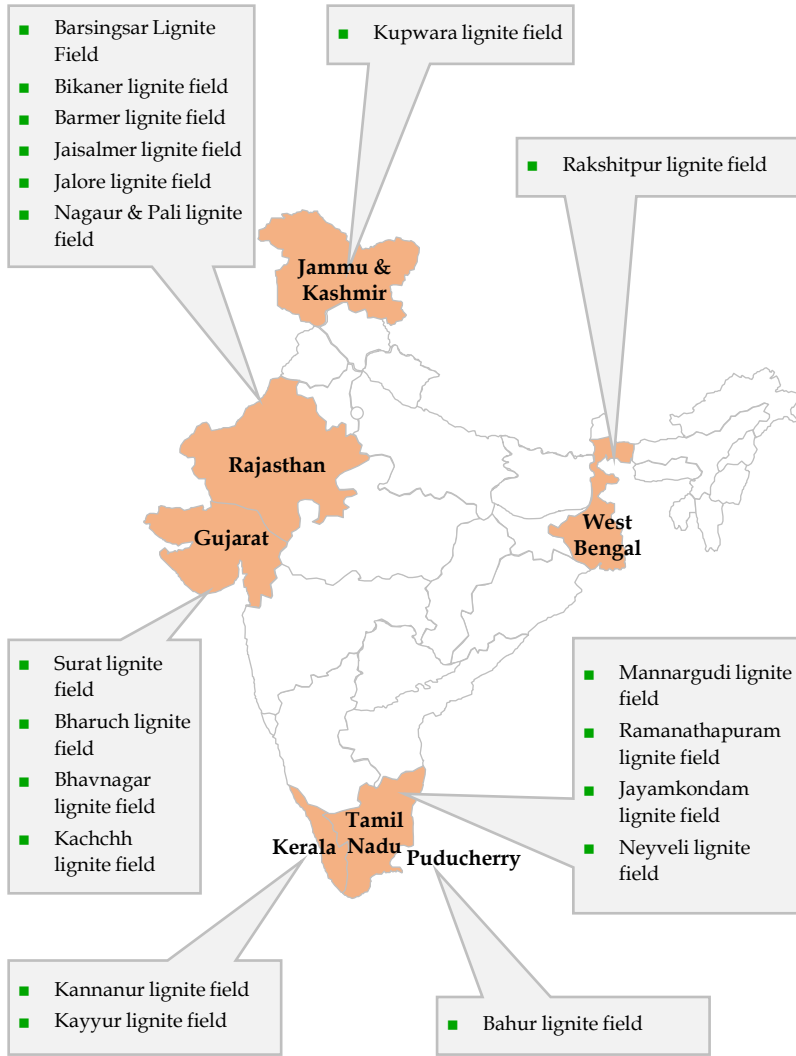
## No. of Shareholders

<b>(A) Promoter &amp; Promoter Group</b>	
Govt. of India	1
<b>(B) Public</b>	
State Govt. - Sponsored Institutions	5
Mutual Funds, Financial Institutions & Banks	26
Insurance	7
Others	1,95,032
<b>Total</b>	<b>1,95,071</b>

**Market Cap - Rs. 11,190.10 Crore#**

\*Shareholding Pattern as on 04.11.2022

#Market Cap as on 11.11.2022 (Closing Price of BSE @ Rs. 80.70)



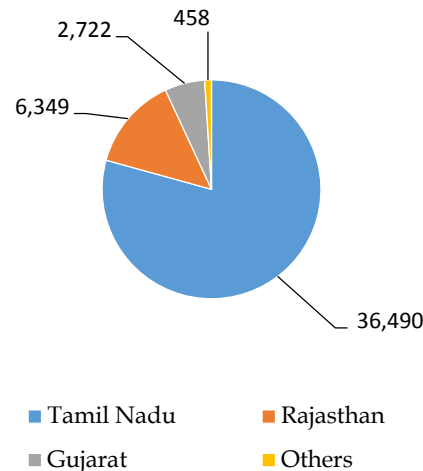
Map not scale

\*Source : Indian Coal and Lignite Resources - 2021 by GSI as on 01.04.2021.

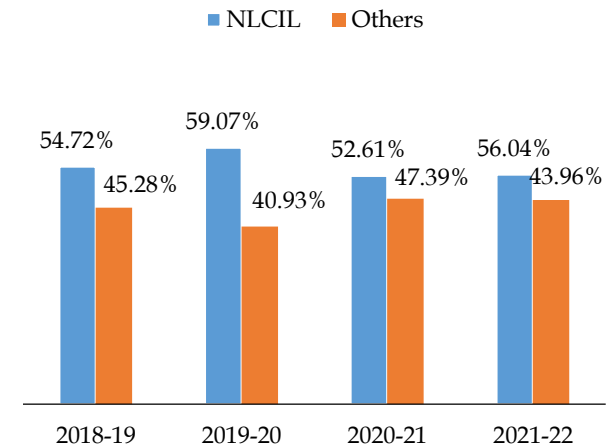
## State wise Geological resources in MT as on 01.04.2021\*

STATE	Measured	Indicated	Inferred	Total	Total (%)
Puducherry	0.00	405.61	11.00	416.61	0.91
Tamil Nadu	4926.92	21910.06	9652.62	36489.60	79.29
Rajasthan	1168.53	3029.78	2150.77	6349.08	13.80
Gujarat	1278.65	283.70	1159.70	2722.05	5.92
J&K	0.00	20.25	7.30	27.55	0.06
Kerala	0.00	0.00	9.65	9.65	0.02
West Bengal	0.00	1.13	2.80	3.93	0.01
<b>Total</b>	<b>7374.10</b>	<b>25650.53</b>	<b>12993.84</b>	<b>46018.47</b>	<b>100.00</b>

## Lignite Reserves (MT)\*

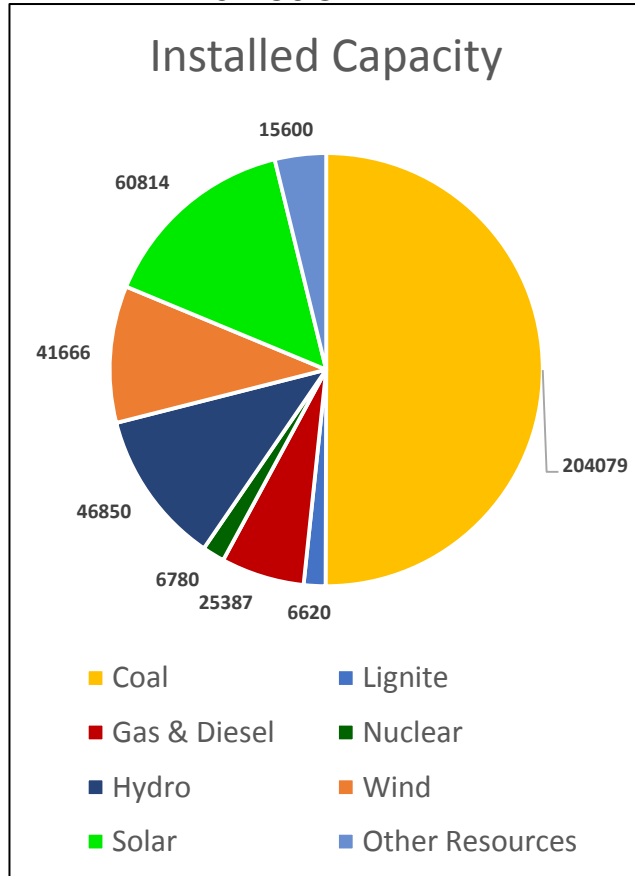


## Market Share of Lignite Production

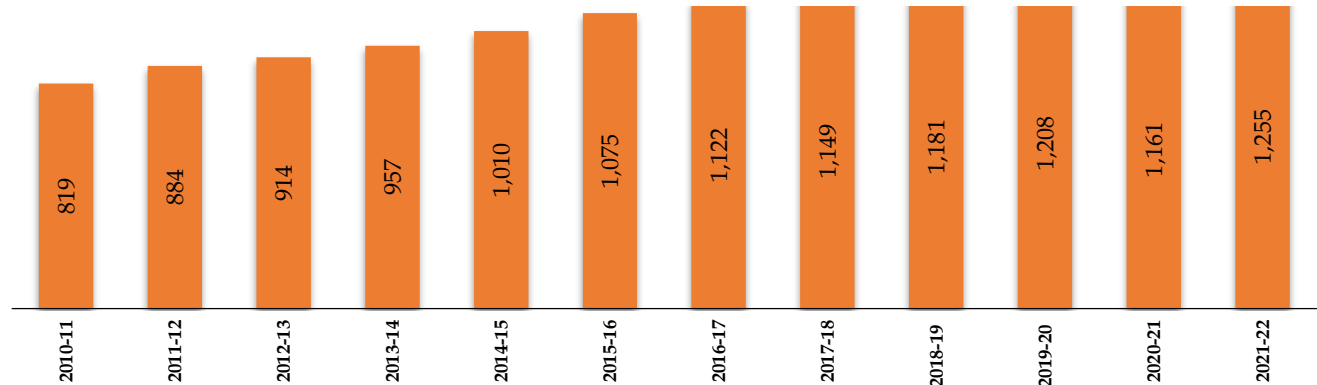


## Installed Capacity as on 30.09.2022

**407796.57 MW**

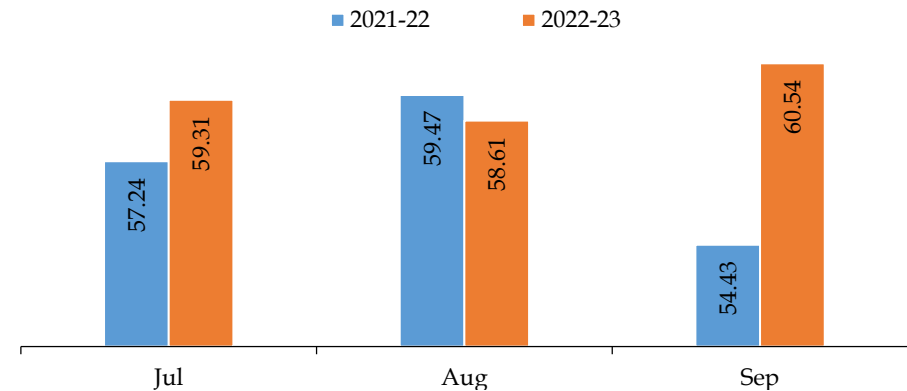
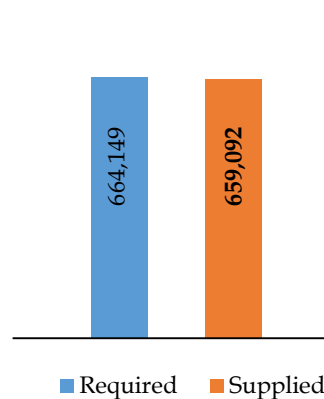


## Per Capita Consumption (kWhr)



All India Energy Requirement & Supply (MU) : Apr-22 to Sep-22(Provisional)- MU

All India Plant Load Factor of Thermal Plants(Excluding Gas Based Plants) %



Source :Central Electricity Authority - Executive Summary September - 2022 Report





## Growth Plans

Sl. No	Project	Existing Capacity	Addition Proposed	Total
1	Lignite (MTPA)	32.10*	8.00**	40.10
2	Coal (MTPA)	20.00^	24.00	44.00
	<b>Total Mining (MTPA)</b>	<b>52.10</b>	<b>32.00</b>	<b>84.10</b>
3	Power - Lignite Based (MW)	3,640	1,320	4,960
4	Power - Coal Based (MW)	1,000	5,180	6,180
5	Power - Renewable (MW)	1,421	4,610	6,031
	<b>Total Power (MW)</b>	<b>6,061</b>	<b>11,110</b>	<b>17,171</b>

\*Existing Capacity as on 31.07.2022 includes Mine IA Exp which is commissioned on 01.04.2022 and achievement of full capacity of 4 MTPA expected by 2028.

^Coal Production started on 26<sup>th</sup> April 2020. Achievement of Full Capacity expected by Jan 2027.

\*\*Addition Proposed is adjusted for reduction in Existing Mines Capacity by 3.5 MT

Source : NLCIL Corporate Plan 2030.

# Growth Plan over 3 Years

Sl. No	Project	Existing Capacity	Addition Proposed	Total
1	Lignite (MTPA)	32.10*	-	32.10
2	Coal (MTPA)^	20.00^	9.00	29.00
	<b>Total Mining (MTPA)</b>	<b>52.10</b>	<b>9.00</b>	<b>61.10</b>
3	Power - Lignite Based (MW)	3,640	-	3,640
4	Power - Coal Based (MW)	1,000	1,980	2,980
5	Power - Renewable (MW)	1,421	2,110	3,531
	<b>Total Power (MW)</b>	<b>6,061</b>	<b>4,090</b>	<b>10,151</b>

\*Existing Capacity as on 31.07.2022 includes Mine IA Exp which is commissioned on 01.04.2022 and achievement of full capacity of 4 MTPA expected by 2028.

^Coal Production started on 26<sup>th</sup> April 2020. Achievement of Full Capacity expected by Jan 2027.

Source :NLCIL Corporate Plan 2030.

# On going / Upcoming Mining & Power Projects

## On Going Mining Projects

Project	MT	Estimated Cost (₹Cr)	Expected COD
South Pachwara Coal Block	9.00	1,795.01	Sept 2028
<b>Total</b>	<b>9.00</b>	<b>1,795.01</b>	

## On Going Thermal Power Projects

Project	MW	Estimated cost (₹Cr)	Expected COD
NUPPL - UP	1,980	17,237.80	Unit I - Mar 23 Unit II - Jul 23 Unit III - Nov 23
<b>Total</b>	<b>1,980</b>	<b>17,237.80</b>	

## On Going Renewable Power Projects

Project	MW	Estimated cost (₹Cr)	Expected COD
Solar-Ground Mounted-Neyveli	10	42.94	Dec 2022
150 MW Wind-Solar Hybrid	150	922.32	Nov 2023
<b>Total</b>	<b>160</b>	<b>965.26</b>	

## Upcoming Renewable Power Projects

Project	MW	Estimated cost (₹Cr)	Expected COD
Wind Project unit - 2	100	525.00	Project is under Planning Stage
250 MW Solar	250	1,212.50	
500 MW Under CPSU scheme	500	2,700.00	
500 MW Under CPSU Scheme	500	2,500.00	
600 MW Under CPSU Scheme	600	3,000.00	
500 MW RE Power	500	2,500.00	
500 MW RE Power	500	2,500.00	
500 MW RE Power	500	2,500.00	
500 MW RE Power	500	2,500.00	
500 MW RE Power	500	2,500.00	
<b>Total</b>	<b>4,450</b>	<b>22,437.50</b>	

## Upcoming Thermal Power Projects

Project	MW	Estimated cost (₹Cr)	Expected COD
Odisha Pit Head TPS	3,200	25,896.00	Project is under Planning Stage
TPS II 2 <sup>nd</sup> Exp	1320	11,189.20	
<b>Total</b>	<b>4520</b>	<b>37,085.20</b>	

## Upcoming Mining Projects

Project	MT	Estimated Cost (₹Cr)	Expected COD
Mine III Neyveli	11.50	3755.71	Project is under Planning Stage
Commercial Coal Block	15.00	1,921.85	
<b>Total</b>	<b>26.50</b>	<b>5677.56</b>	

Source : NLCIL Corporate Plan 2030.

## MOU with Assam for 1000 MW

- Solar 1000 MW through JV in phased manner
- MoU signed between NLCIL & APDCL on 09.08.2022 for the installation of 1000 MW RE power .Estimated CAPEX – Rs.5500 crore

## Lignite to Methanol

- Proposed capacity of Lignite gasification – based Methanol Project – 1200TPD
- The Project is expected to complete by March-2027
- NLCIL engaged M/s EIL as Project Management Consultant for implementation

## Lignite to Diesel

- Proposal has been received from the firm for pilot Plant of 290t/day of Lignite (Diesel - 40 t/day and Naphtha- 9.2 t/day)
- The CAPEX for the proposed plant - Rs.208.92 Crore

## Overburden to Sand

- It is found that around 34% to 94% of sand can be recovered from overburden.
- The Sand Grade found is suitable for construction applications. further Proposal for TEV Study is in progress



## Corporate Social Responsibility

## Details of CSR expenditure (Rs. Cr)

Year	Norm	Actual
2019-20	46.78	75.66
2020-21	46.74	46.74
2021-22	40.80	41.03*

\* Includes Rs. 0.23 Cr spent on CER Expenses of Talabira Project

## Green belt development

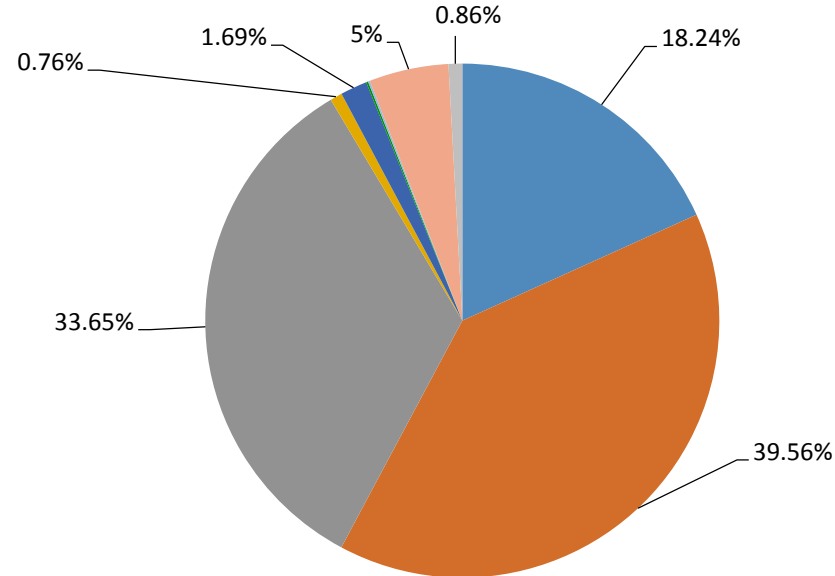


*Neyveli Township  
Overview  
Green Cover with  
191 lakh trees.*

*Paddy field on  
Reclaimed Mined land  
at Neyveli*



## % of amount spent on CSR Activities in 2021-22



- Health Care, Family Welfare and Sanitation
- Covid 19 Preventive/Relief Measures
- Providing Education including Special Education, Vocational skills, Scholarships
- Promoting Sports in Rural Areas
- Providing Link Roads/ Access for Rural Development
- Heritage, Arts and Culture
- Welfare of Armed forces
- Administrative over heads
- Disaster Management including relief, rehabilitation and reconstruction activities





## Energy Conservation

- Formed 14 industrial service units for adoption of energy conservation measures
- Installation of energy efficient equipments
- Energy Audit for Thermal Power Stations
- Intensive installation of LED bulbs in township area
- Minimisation of idle running hours in crushers in TPSs
- Timer Processor units are being installed in outdoor lights
- Adding of capacitor banks through induction motors
- 50.77 MU of energy conserved through energy efficiency measures

## Technology Absorption

- Techno Economic Feasibility done for solar drying of lignite.
- Development of Micro Hydel power generation
- Pilot project of Floating Solar PV plant of 200 Kw at thermal lake is in progress
- Extraction of construction grade sand from overburden materials
- Studies on Zeolite based catalyst for mitigation of exhaust gas pollution
- Exploring alternate use of lignite is in progress.

## R & D Initiatives

- Underground Coal Gasification, Silica sand Beneficiation Plant, Development of fly ash based pesticide, Dynamic Loading of Conveyors
- 2 projects completed – Conservation of energy through implementation of Programmable Logic Control (PLC) based Dynamic Loading System in Conveyors & Delineation of buried sub-surface objects in Opencast mines.
- Extracting Methanol and Diesel from Lignite is also under consideration.
- Innovation Incubation Centre (IIC) in collaboration with premier institutions to promote innovation leading to start up/entrepreneurship

- Risk in Land acquisition
- Realisation of Dues from DISCOMs
- Surrender of Power by beneficiaries
- Denial of agreed tariff due to delay in commissioning of projects.
- Competition consequent to de – regulation in Indian power sector
- Risk due to stringent Environmental norms
- Stringent Norms prescribed by regulatory authority affecting power tariff.
- Cost and time overrun of projects under execution
- Higher cost of lignite Mining



# Thank You