

AGI Infra Limited

Report Date: 28 Aug 2017

Key Stock Indicators

BSE Ticker :	539042	CMP as on 11 Aug 2017-Rs/share :	195.0	Shares outstanding (mn) :	10.2
Bloomberg Ticker :	AGI:IN	52 week range up to 11 Aug 2017 (Rs)(H/L) :	203.3/76.0	Free Float (%) :	27.5
Face value per share :	10.0	Market Cap as on 11 Aug 2017 (Rs mn) :	1,992	Average daily volumes (12 months) :	13,569
Div.Yield (%) :	0.0	Enterprise Value as on 11 Aug 2017 (Rs mn) :	2,364	Beta :	0.5

Result Summary - Half Yearly

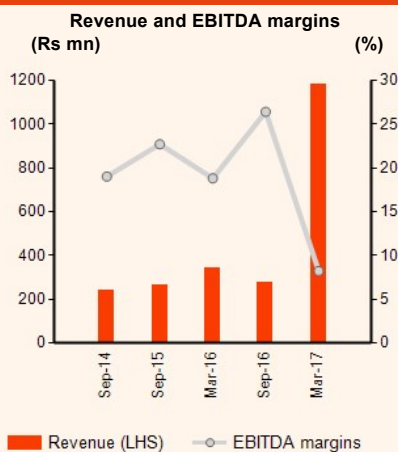
Rs million	Mar-17	Mar-16	y-o-y (%)
Net Sales	1,185	343	245.1
Raw material cost	962	195	391.3
Employee cost	67	39	71.6
Other expenses	58	43	32.7
EBITDA	97	64	51.1
EBITDA margins (%)	8.2	18.8	-1060 bps
Depreciation	13	9	54.9
EBIT	83	55	50.4
Interest	33	27	21.4
Other Income	-	2	-
Extraordinary Income (Expenses)	-	-	-
PBT	49	29	67.4
Tax	16	9	73.5
PAT	33	20	64.5
PAT margins (%)	2.8	5.8	-300 bps
No. of shares (mn no.)	10.2	10.2	-
Earning per share (EPS)	3.23	1.96	64.8

n.m. : Not meaningful
Source: Company | CRISIL Research

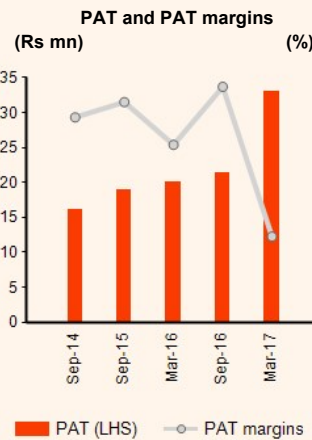
FINANCIAL UPDATE

- Revenue increased 245.1% y-o-y to Rs 1,185 mn in H2FY17 from Rs 343 mn in H2FY16.
- EBITDA increased 52% y-o-y to Rs 97 mn in H2FY17 from Rs 64 mn in H2FY16.
- PAT rose 64.5% y-o-y to Rs 33 mn for H2FY17 from Rs 20 mn in H2FY16.

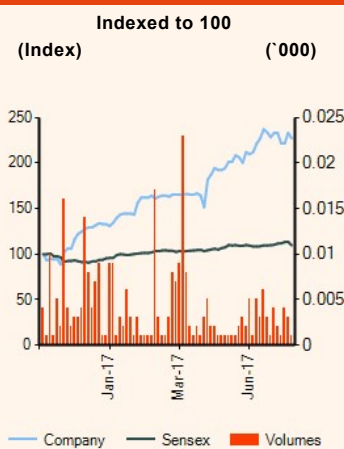
Financial Performance Trends



Source: Company | BSE | CRISIL Research

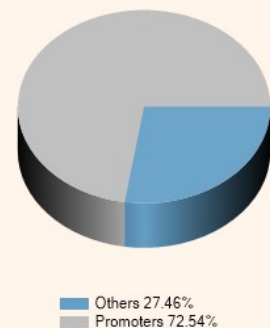


Share Price Chart



Shareholding Pattern

As on June 2, 2017



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Analyst Disclosure

None of the team members involved in the preparation of the report has any conflict of interest that may bias the opinion provided in the report.

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