

Listing Compliance and Legal Regulatory BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Fort, Mumbai – 400 001 BSE Scrip Code: 532749	Listing and Compliance National Stock Exchange of India Limited Exchange Plaza, C-1, Block G Bandra Kurla Complex, Bandra (East), Mumbai – 400 051 NSE Symbol: ALLCARGO
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August 13, 2018

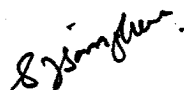
Dear Sirs,

Sub: Investors' Earnings Presentation

Pursuant to Regulation 30(6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 (the "Listing Regulations"), read with Part A of Schedule III of the Listing Regulations, we are attaching herewith the Investors' Earnings Presentation for the quarter ended June 30, 2018.

Pursuant to Regulation 46(2)(o) of the Listing Regulations, the aforesaid information is also available on the website of the Company i.e. www.allcargologistics.com.

Thanking you,
Yours faithfully,
For Allcargo Logistics Limited


Shruta Sanghavi
Company Secretary



Encl: a/a

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EARNINGS
PRESENTATION
Q1-FY19

all cargo logistics Ltd.
Ingenuity In Motion

Overview

- Allcargo Logistics was incorporated in 1993 by the Chairman Mr. Shashi Kiran Shetty.
- The company was listed on both the BSE & NSE in June 2006 and has a current market cap of ~INR 25,921 Mn as on 30th June, 2018.



Only integrated multinational logistics company in India



Global Leader in Less than Container Load Consolidation segment of Multimodal Logistics



Strong network of over 300 offices in more than 160 countries



India's largest and widest CFS/ICD network



Only CFS player in India with presence at key ports which handle ~75% of the total container traffic in India



Strategic first mover in development of Multimodal Logistic Parks in Haryana, Hyderabad, Bangalore and Nagpur



Leading Project and Engineering solutions provider and vessel owner in bulk coastal shipping



Among very few Indian companies specializing in contract logistics, segment with significant growth opportunities



Strong management team with experienced industry professionals

Allcargo has a diversified presence across multiple logistics sectors including ocean & airfreight-forwarding, container freight stations (CFS), inland container depots (ICD), project cargo, equipment rental, coastal shipping and contract logistics.

Business Verticals

**Multimodal
Transport
Operations
(MTO)**
FY18
Revenue Share
88%



**Container
Freight
Stations (CFS)**
FY18
Revenue Share
7%



**Project &
Engineering
Solutions (P&E)**
FY18
Revenue Share
5%



**Contract
Logistics**
Consolidated
at the PAT
level as an
associate
company



- In Multimodal Transport Operations its services include Non Vessel Owning Common Carrier (NVOCC) operations related to Less than Container Load (LCL) consolidation and Full Container Load forwarding activities in India and across the world
- Global leader in neutral Less-than-Container- Load (LCL) segment for ocean cargo across 4,000 port pairs globally
- Global brand – ‘ECU Worldwide’ with presence in 160 plus countries
- Diversified customer base with an asset-light business model
- Presence in Full Container Load (FCL)

- The company’s Container Freight Stations (CFS) segment operations cater to the handling of import and export cargo, custom clearance, warehousing, and other related ancillary logistics services
- Amongst top 3 CFS operators at JNPT, Chennai and Mundra
- ICDs at Pithampur & Dadri
- CFS at Kolkata recently commissioned
- Land of 93 acres for Logistics Park at Jhajjar has been acquired

- Allcargo is also one of the pioneers and leaders in Project & Engineering services offering integrated end-to-end logistics services including transportation of over-dimensional & over-weight cargo, on-site lifting & shifting, equipment leasing and coastal shipping
- Diverse fleet of equipment for building & creating infrastructure
- Presence in Coastal Shipping through 2 owned ships

- Allcargo is one of the predominant players in the contract logistics segment through its majority equity shareholding in Avvashya CCI
- Includes designing and planning supply chains, warehousing, transporting & managing inventory
- Network of warehouses across 45 locations in India
- A predominant player managing activities for key clients in Chemicals, Auto & Engineering, Pharma, Fashion & Retail sectors


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- Strong network of over 300 offices in more than 160 countries
- 2400+ direct trade lanes and 530+ destinations
- All acquisitions in MTO segment have been EPS accretive and cash flow positive from start of integration
- Fixed and committed stuffing and sailing schedules ensuring the quickest turnaround in LCL
- The MTO segment is an Asset-light business with high returns on capital employed
- Domestic consolidation movements connected to ICDs, CFS for export and import
- Dedicated hazardous cargo movement and automated real time shipment status update and online tracking


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- Widest and strongest CFS-ICD network in India with presence of 7 facilities across 6 strategic locations
- Amongst top 3 CFS operators
- CFS-ICD facilities are equipped with modern handling equipment like RTGS
- Land bank of more than 200 acres in Hyderabad, Bangalore and Nagpur
- Green facilities like kitchen gardening, STP tank, solar generator system and rainwater harvesting
- RFID kiosks with web tracking of containers
- Highest number of girder bridge assisted deliveries
- Capable of executing projects which need cranes and lifting solutions ranging in capacity from 50-3000 metric tons
- Strict safety and environment regulations


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- The company has a network of warehouses across 45 locations in India
- Seamless visibility for the client into all inventory in warehouses via CCTV cameras
- Temperature managed warehousing
- Strict safety and environment regulations

FY18 Consolidated Financials

Consolidated Income
 INR 60,469 Mn

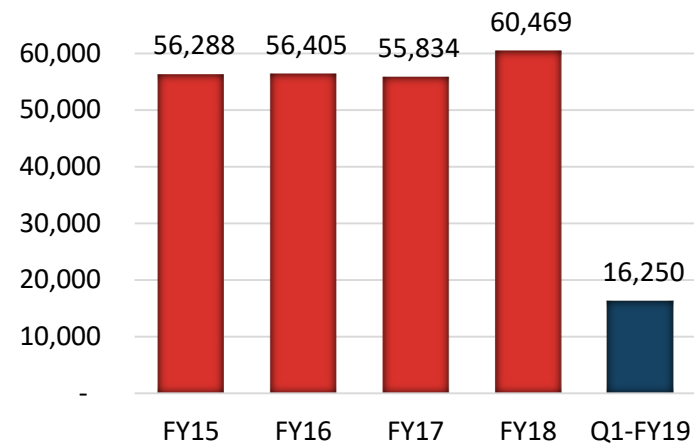
EBITDA
 INR 3,749 Mn

EBITDA Margin
 6.20%

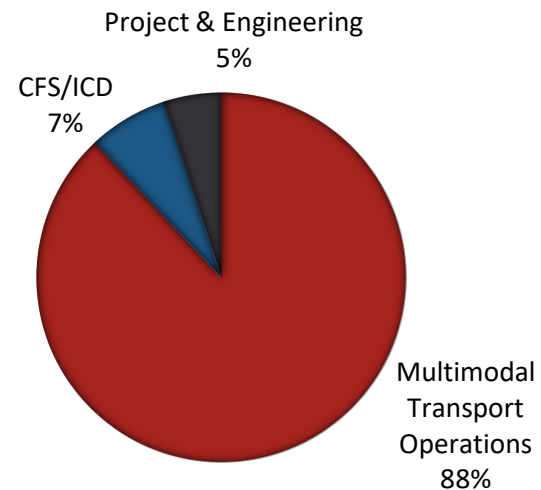
Net Profit
 INR 1,740 Mn

PAT Margin
 2.88 %

Consolidated Revenues

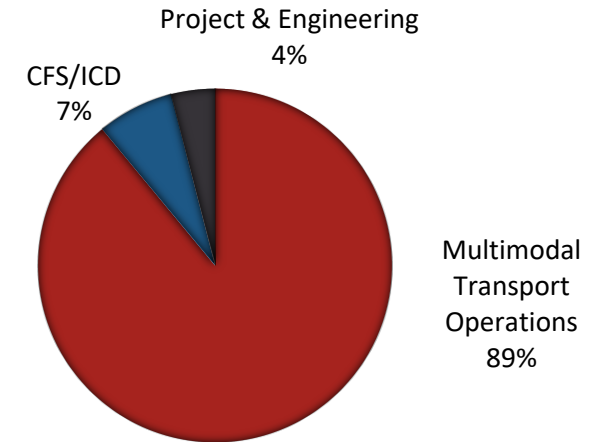


Segmental Revenue FY18





Q1–FY19
EARNINGS
OVERVIEW

Q1-FY19 Consolidated Financial Performance:**Revenue from Operations-** INR 16,250 Mn**EBITDA -** INR 1,021 Mn**EBITDA Margin –** 6.28%**Net Profit -** INR 543 Mn**PAT Margin –** 3.34%**Total Comprehensive Income –** INR 567 Mn**Diluted EPS -** INR 2.16**Gross Debt Outstanding -** INR 5,400 Mn**Net Debt Outstanding -** INR 2,041 Mn**Consolidated Segmental Revenue Q1-FY19**

Particulars (INR Mn)	Q1-FY19	Q1-FY18	Y-o-Y	Q4-FY18	Q-o-Q
Revenue from Operations	16,250	14,834	9.6%	15,363	5.8%
Expenses	15,229	13,804	10.3%	14,624	4.1%
EBITDA	1,021	1,030	(0.9)%	739	38.2%
EBITDA Margin (%)	6.28%	6.94%	(66) Bps	4.81%	147 Bps
Other Income	51	159	(67.9)%	155	(67.1)%
Finance cost	79	83	(4.8)%	75	5.3%
Depreciation and amortisation expenses	397	399	(0.5)%	397	NA
PBT before associates, joint ventures	596	707	(15.7)%	422	41.2%
Share of profit from associates and joint ventures	33	5	NA	8	NA
Exceptional Items	0	0	NA	(69)	NA
Profit before tax	629	712	(11.7)%	361	74.2%
Tax expense	86	76	13.2%	231	(62.8)%
PAT	543	636	(14.6)%	130	NA
PAT Margin (%)	3.34%	4.29%	(95) Bps	0.85%	249 Bps
Other Comprehensive income	24	285	(91.6)%	217	88.9%
Total Comprehensive income	567	921	(38.4)%	347	63.4%
Diluted EPS	2.16	2.49	(13.3)%	0.47	NA

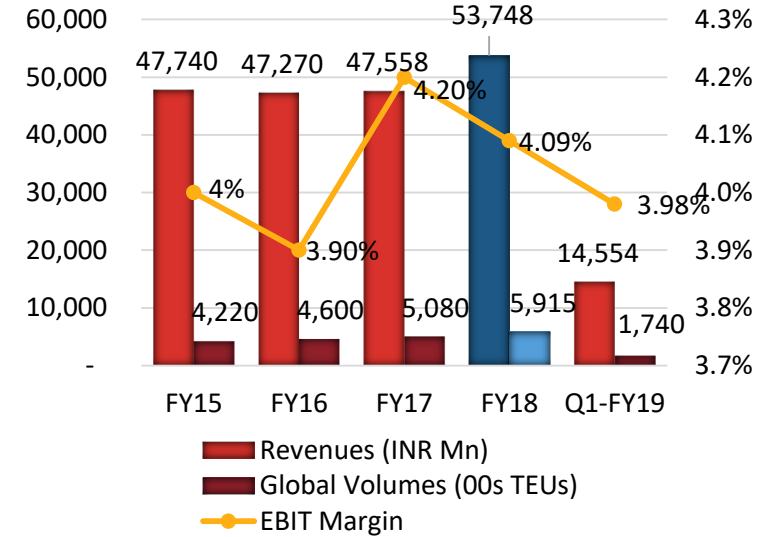


SEGMENTAL
FINANCIAL
OVERVIEW

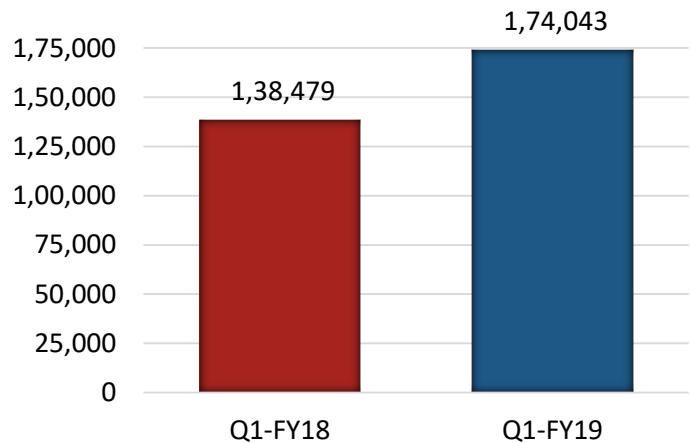
Key Operational Highlights in MTO for Q1-FY19:

- The segment continued gaining global market share.
- Volumes from allied and FCL services continued to grow.
- YoY quarterly growth in volumes is 26%.

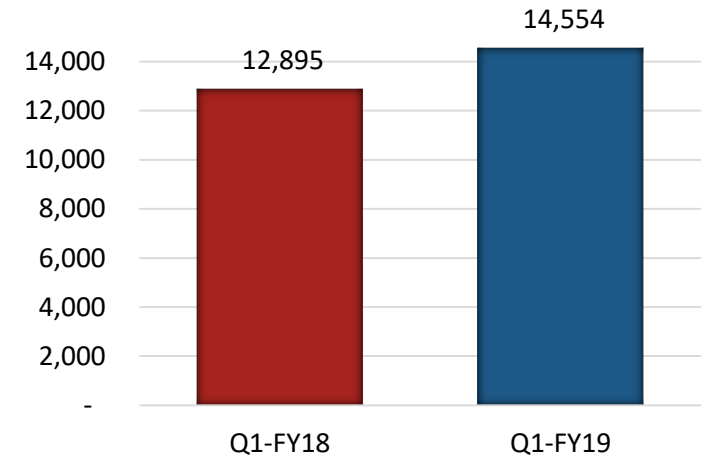
Segment Financials at a Glance



Quarterly Volumes (TEUs)



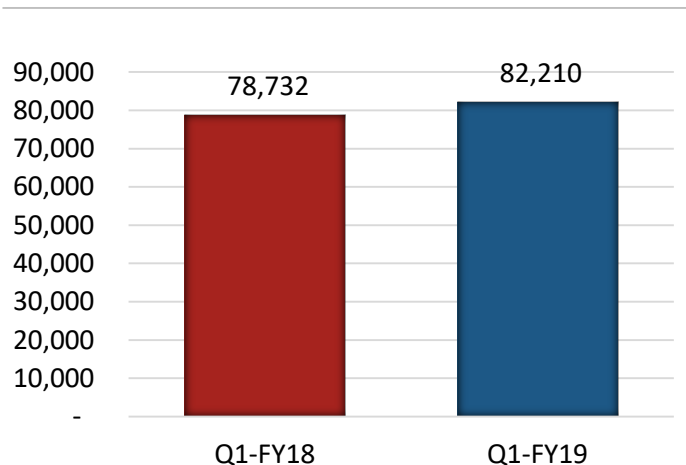
Quarterly Revenues (INR Mn)



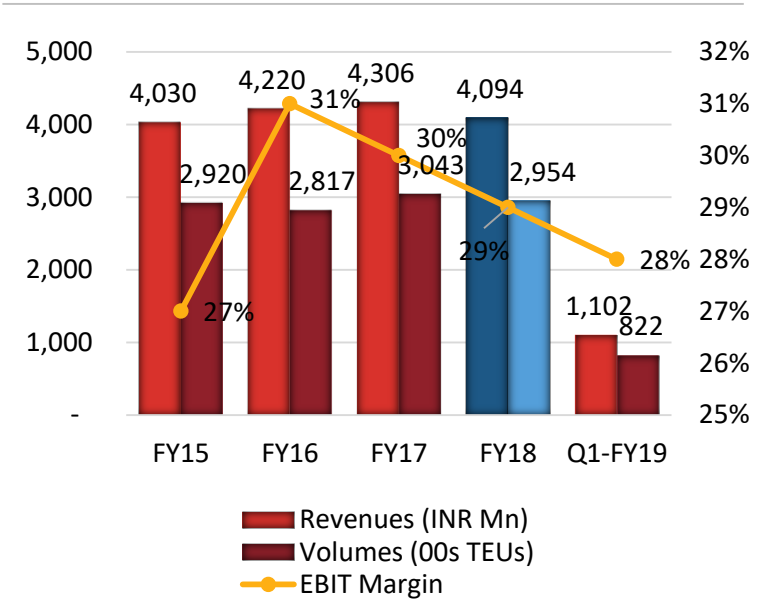
Key Operational Highlights for Q1-FY19:

- Despite increase in Direct port Delivery (DPD), there was a marginal increase in revenue in Q1-FY19.
- Kolkata CFS which commissioned operations in Q3-FY18 is at break even level.
- For the Jhajjar multimodal logistics park, we have acquired approximately 93 acres of land plus leased railway land of 27 acres as on date, making the total 120 acres.
- YoY quarterly volumes increased by 4%.
- There was an improvement in the market condition and growth in port volumes.

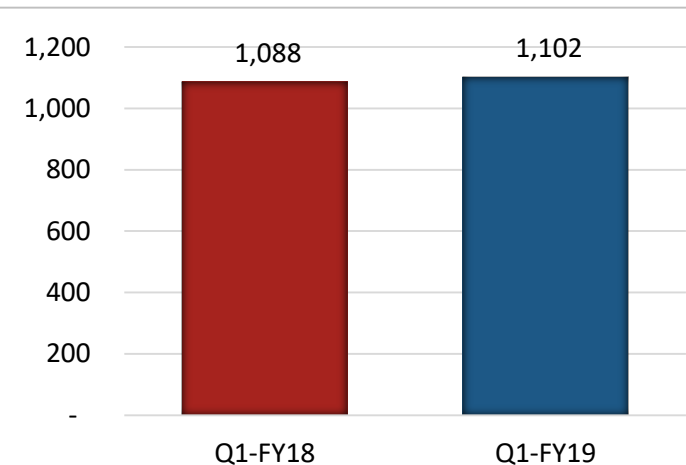
Quarterly Volumes (TEUs)



Segment Financials At A Glance



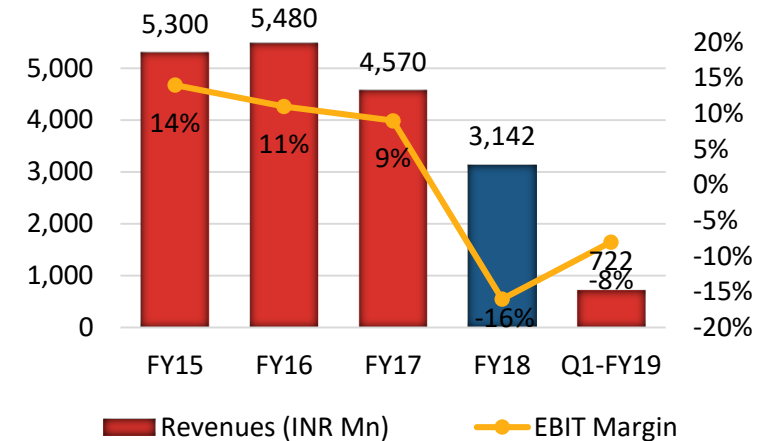
Quarterly Revenues (INR Mn)



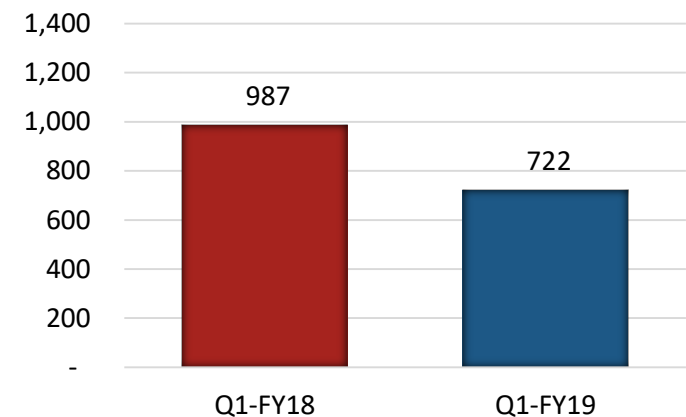
Key Operational Highlights for Q1-FY19:

- Revenues declined primarily due to decrease in asset utilization of the equipment leasing business..
- In Q1-FY19, the projects from the wind sector continued to remain subdued. The industry is now on a growth trajectory and as per current estimate, on course to add 30 GW of new capacity in the next 3 years, thereby taking the cumulative total capacity to 60 GW in FY21. We have significant enquiries from this sector for the projects which are planned to start towards end of Q2-FY19.
- The company has been increasing its focus on Project Transportation, where the current executable order book is around INR 175 Cr+.
- Renewed revival in 8 core sectors- coal, crude oil, natural gas, refinery products, fertilisers, steel, cement and electricity which should help increase the capacity utilisation.
- The company intends to explore opportunities in neighbouring countries like Sri Lanka, Myanmar, Nepal and Bangladesh.

Segment Financials At A Glance



Quarterly Revenues (INR Mn)

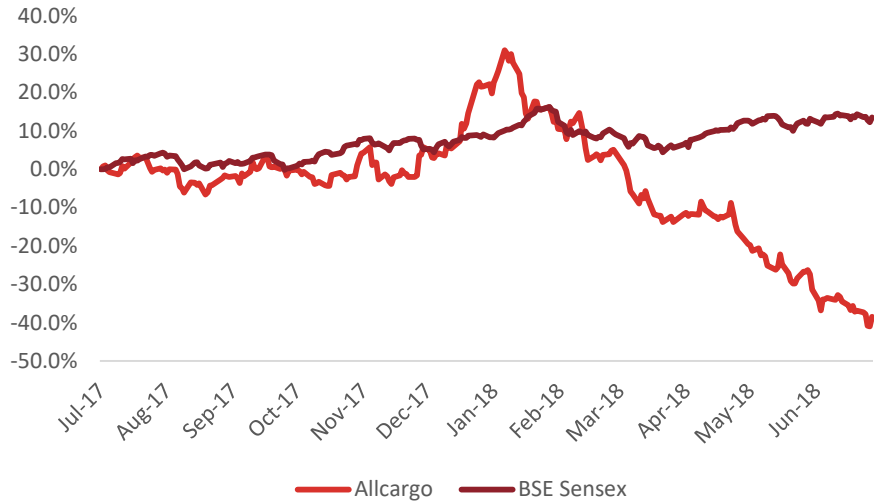




HISTORICAL
FINANCIAL
OVERVIEW

Particulars (INR Mn)	FY15	FY16	FY17	FY18
Revenue from Operations	56,288	56,405	55,834	60,469
Expenses	51,534	51,366	51,185	56,720
EBITDA	4,754	5,039	4,649	3,749
EBITDA Margin (%)	8.45%	8.93%	8.33%	6.20%
Other Income	526	280	453	414
Finance cost	535	408	324	299
Depreciation and amortisation expenses	1,574	2,006	1,662	1,591
PBT before associates, joint ventures	3,171	2,905	3,116	2,273
Share of profit from associates and joint ventures	-	70	38	48
Exceptional Items	-	-	-	(69)
Profit before tax	3,171	2,974	3,154	2,252
Tax expense	700	498	776	512
PAT	2,491	2,476	2,378	1,740
PAT Margin (%)	4.43%	4.39%	4.26%	2.88%
Other Comprehensive income	-	294	(598)	559
Total Comprehensive income	2,491	2,770	1,780	2,299
Diluted EPS	9.52	9.52	9.25	6.97

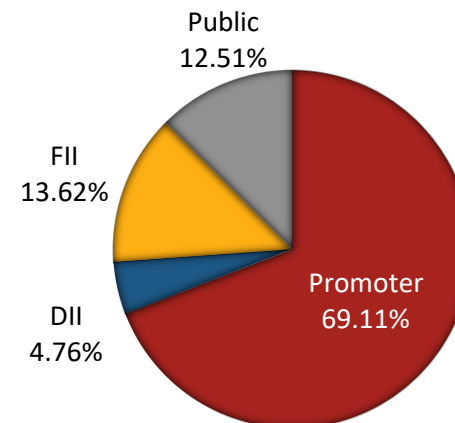
Equity and Liabilities (INR Mn)	FY17	FY18	Assets (INR Mn)	FY17	FY18
Equity			Non Current Assets		
Equity share capital	491	491	Plant, Property & Equipment (net)	11,508	10,878
Other equity	17,431	19,152	Capital Work in Progress	365	97
Equity attributable to equity holders of the parent	17,922	19,643	Investment Property (net)	467	455
Non-controlling interest	207	172	Goodwill	2,604	2,880
Total Equity	18,129	19,815	Total Intangible assets	1,205	1,393
			Investments in joint ventures and associates	2,057	2,139
Non-current liabilities			Investments in others	-	4
Financial liabilities			Loan	388	278
Borrowings	3,387	2,701	Other financial assets	111	108
Other financial liabilities	9	8	Deferred tax assets (net)	738	974
Long term provisions	21	24	Income tax assets (net)	200	229
Net employment defined benefit liabilities	4	4	Other non-current assets	567	550
Deferred tax liability (net)	17	43	Total Non-Current Assets	20,210	19,985
Other non-current liabilities	36	47	Current Assets		
Total Non-current liabilities	3,474	2,827	Inventories	101	96
			Investments	852	1,106
Financial liabilities			Loans	212	389
Borrowings	1,747	1,121	Trade receivables	7,522	8,386
Trade payables	6,165	6,851	Cash and cash equivalents	1,692	2,342
Other payables	465	334	Other bank balances	181	104
Other financial liabilities	964	1,293	Other financial assets	713	631
Net employment defined benefit liabilities	370	420	Income tax assets (net)	179	116
Other current liabilities	1,078	1,320	Other current assets	670	813
Income tax liabilities (net)	147	111	Assets classified as held for sale	207	124
Total Financial liabilities	10,936	11,450	Total Current Assets	12,329	14,107
Total equity and liabilities	32,539	34,092	Total Assets	32,539	34,092

Stock Return (As on 30th June, 2018)

PRICE DATA (AS ON 30th JUNE, 2018)

Face value (INR)	2.0
Market Price (INR)	105.5
52 Week H/L (INR)	228.8/99.7
Market Cap (INR Mn)	25,920.9
Equity Shares Outstanding (Mn)	245.7
1 Year Avg. trading volume ('000)	412.6

INSTITUTIONAL HOLDING

Acacia	6.34%
SBI Mutual Fund	3.64%
Singapore Government Pension Fund Global	2.18%
HSBC Global Investments Funds	1.02%

Shareholding Structure (As on 30th June, 2018)


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