



Dated: September 07, 2022

The Manager
BSE Limited
Corporate Relationship Department
Phiroze Jeejeebhoy Towers
Dalal Street
Mumbai- 400001
Scrip Code: 540750

The Manager
National Stock Exchange of India Ltd
Listing Department
Exchange Plaza, 5th Floor, Plot No. C/1
G Block, Bandra Kurla Complex
Bandra (E), Mumbai-400 051
Symbol: IEX

Sub: Investor Presentation Annual Analyst Meet 2022

Dear Sir / Madam,

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find attached the Investor Presentation that will be made during the Annual Analyst Meet 2022 scheduled to be held today i.e., September 07, 2022.

The above information will also be made available on the website of the Company:
www.iexindia.com

You are requested to take the above information on record.

Thanking You.

Yours faithfully,

For Indian Energy Exchange Limited

VINEET
HARLALKA
Digitally signed by
VINEET HARLALKA
Date: 2022.09.07
08:42:45 +05'30'

Vineet Harlalka
CFO, Company Secretary & Compliance Officer
Membership No. ACS-16264

Encl: as above

Indian Energy Exchange Ltd

Registered Office: C/o Avanta Business Centre, First Floor, Unit No. 1.14(a), D2, Southern Park, District Centre, Saket, New Delhi-110017, India

Corporate Office: 9th Floor, Max Towers, Sector 16B, Noida, Uttar Pradesh-201301, India

Tel: +91-011-3044 6596 | Tel: +91-120-4648 100 | Fax No.: +91-120-4648 115

CIN: L74999DL2007PLC277039 | Website: www.iexindia.com



Analyst Meet 7th September 2022

Disclaimer



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In this presentation:

Indian Energy Exchange

Business Updates

Policy & Regulatory

Customer Centricity

Exchange Technology

Financial Performance

Indian Gas Exchange

Electricity Value Chain

Generation



Transmission



Distribution & Consumption



Energy Transition

Installed Capacity	As on 30 th Jun22	FY 2030 CEA Proj.
Total GW	403	817
Coal Cap GW	211	266
Coal (%)	51.5	32.6
RE & Hydro GW	160	506
RE & Hydro %	39.7	61.9
Upcoming Coal Cap GW	27 GW	-

50% Non-fossil fuel based Capacity

World's largest network

- Inter-reg. trans. Cap.: 113 GW
- 4.60 Lakh CKM of trans. lines
- Green Corridor: RE rich states; projects for evacuation of RE into National grid
- 99.9% times no congestion

One Nation One Price

Reforms Underway

- **Avg. AT & C Losses:** 21% presently to 15%
- **Reduction in Outstanding dues & ensuring future payments**
- Liquidity infusion schemes
- Choice to consumers
- Electrification as decarbonization lever: EV, Cooking, Traction

Regulatory Strengthening

Electricity Growth Drivers

India is placed as the most promising economy on the global map:

➤ Industrialization

- ✓ High GDP growth of about 8% expected to drive electricity
- ✓ Core sector, traction, EV, cooking will drive electricity consumption

➤ Rapid urbanization/ Rural Electrification

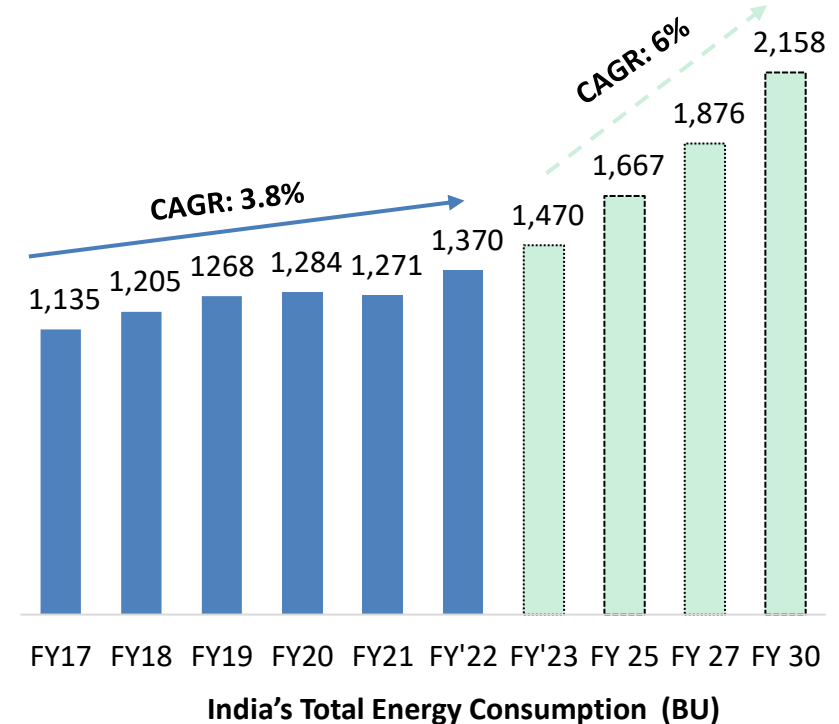
- ✓ 17 of 20 world's fastest growing cities in India

➤ Consumer demand growth

- ✓ Last mile connectivity –Power on 24x7 basis
- ✓ FY22 energy consumption growth 7.8% YoY

➤ Power Demand Projection for FY 23-30

- ✓ Till FY 27 electricity intensity factor of 90% over projected GDP growth
- ✓ FY 28 onwards – CEA demand growth projections
- ✓ Expected to grow at CAGR of 6%

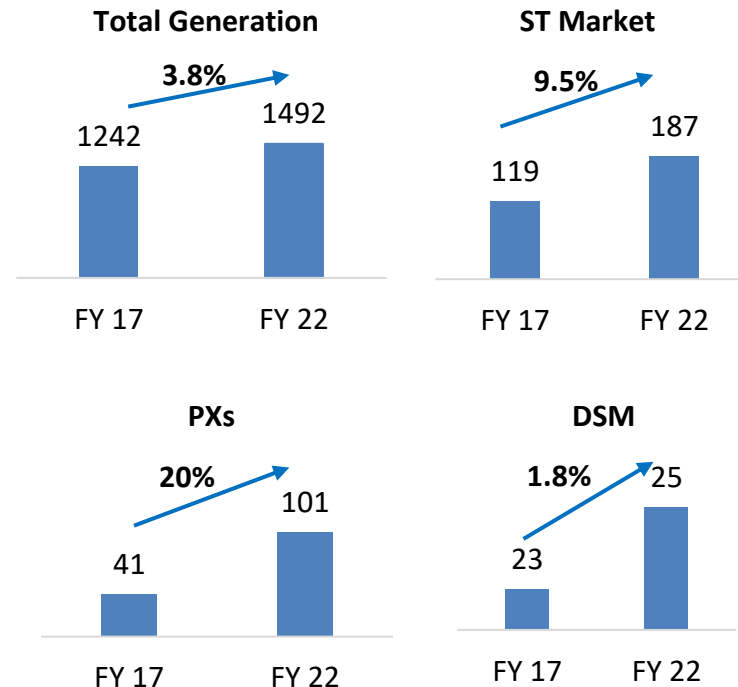


Short Term Market Comparison

Transaction Type	FY22 Volume (BU)	% Share in Short Term	% Share in Generation
Bilateral	60	32.1%	4.5%
Direct	21	11.0%	1.6%
Trader	40	21.1%	3.0%
PXs	102	54.3%	7.7%
DSM	25	13.5%	1.9%
Total Short Term	187		14.1%
Total Generation*	1321		

Source: CERC MMC Report* Generation excluding renewables and captive

ST Market Trend (BU) – 5 Year CAGR



In last 5 years, as against electricity consumption increase of 3.8% Exchange volume increased by 20% 6

India's premier technology-led energy marketplace



- Nation wide, automated and transparent trading platform for physical delivery of electricity, renewables & certificates
- Commenced operations in 2008; CERC regulated
- Publicly listed company – 2017 (NSE and BSE)
- ISO 9001:2015, ISO 27001:2013, ISO 14001:2015
- **DAM & RTM Market Share : 99.9%**
- **Overall Market Share incl DAM, TAM, RTM, Green Market FY22: 94.2%**
- Electricity volume CAGR 33% since 2008
- FY 22 electricity volume: 96 BU (peak ~ **20,000 MW**)

Robust Ecosystem

7000+

Registered participants

4400+

Commercial & Industries

1500+

RE Generators & Obligated Entities

600+

Generators

55+

Discoms (all)

100+

ESCert Entities

33%

Volume Growth CAGR since 2008

99%

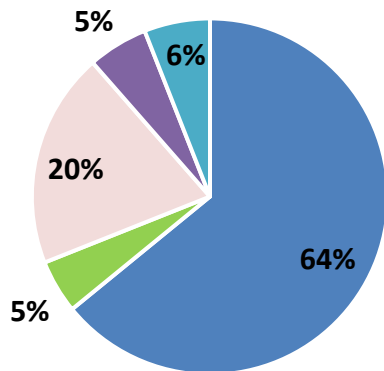
Market Share in DAM

100%

Market Share in RTM

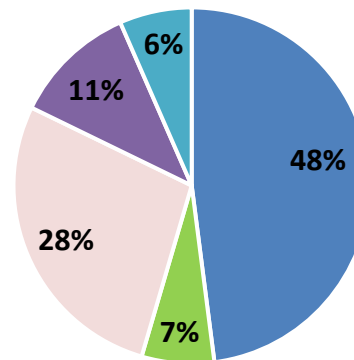
Product Mix

FY22



Total Electricity Volume: 102 BUs

FY23 till Aug'22

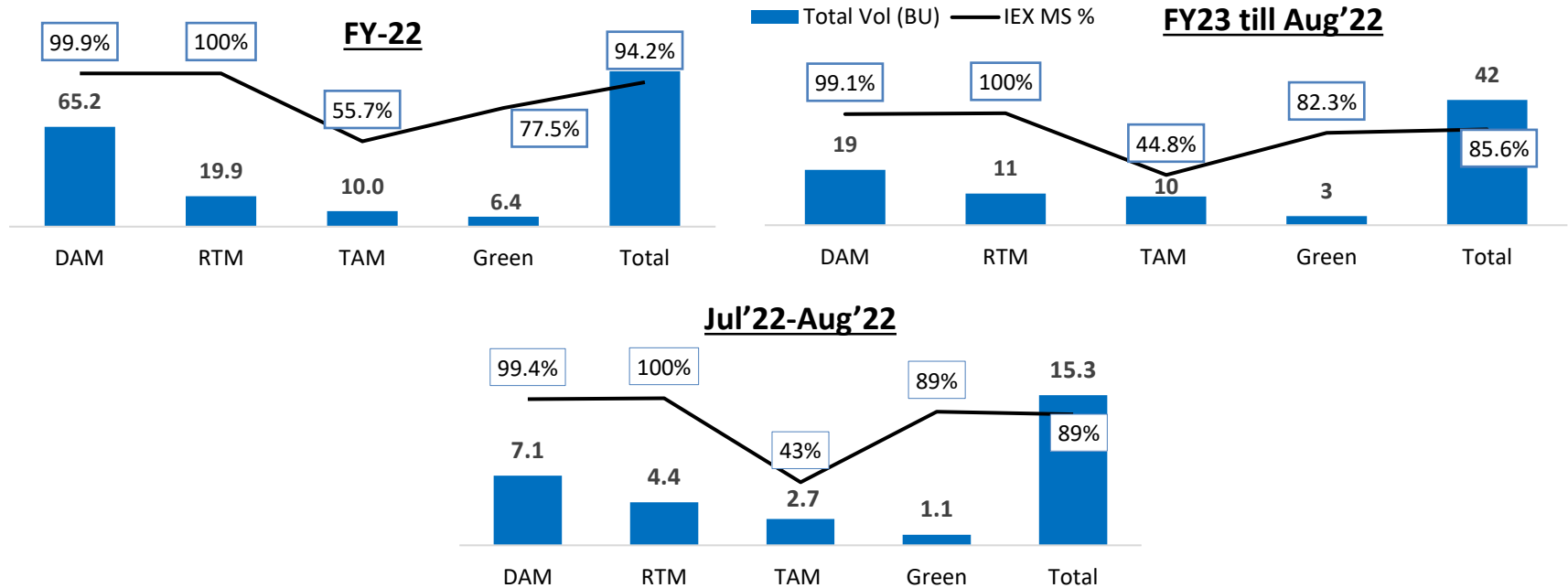


Total Electricity Volume: 38 BUs

- DAM
- Green
- RTM
- TAM
- Certificates

Matching	Closed, Double- sided Auction	Open Auction - Uniform Price Step	Continuous Matching	Reverse Auction
Existing Products	DAM, GDAM & RTM	Weekly, Daily	ITD & DAC	
New Products	-	Monthly	-	Any Day Single Sided

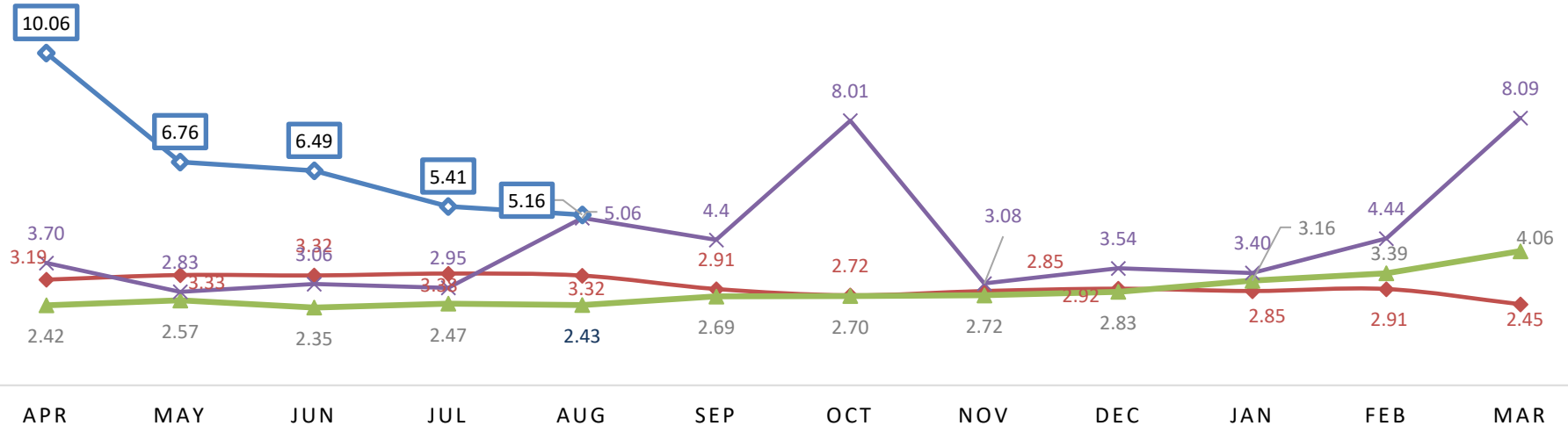
IEX Market Share Product Wise



- Temporary Shift in Volume from DAM to DAC segment was observed due to-
 - ✓ Firm tie up due to uncertainty of availability in peak hours
 - ✓ Double charging of transmission charges in collective transactions
- TAM Volume increased by 105% in first 5-month YoY basis
- Volume likely to shift to DAM/RTM with improvement in supply & implementation of sharing regulation

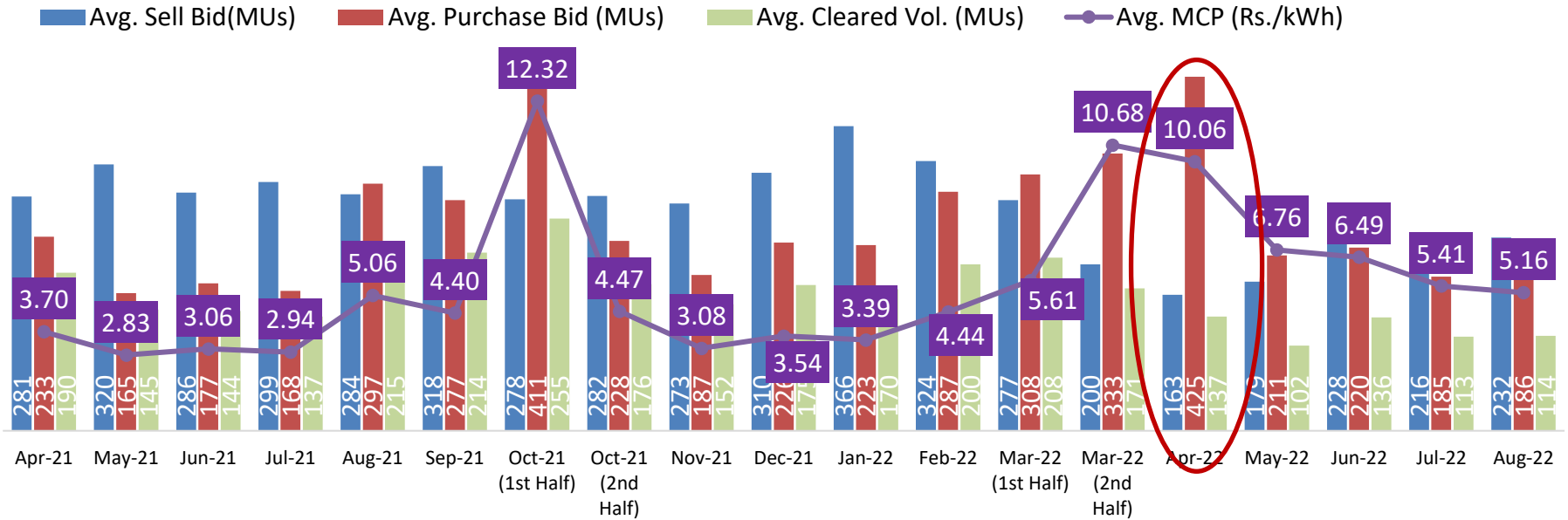
DAM: Price trends (Rs./kWh)

FY-20 : 3.01 | FY-21 : Rs 2.82 | FY-22 : 4.39 | FY-23: 6.76



- Monthly average DAM price increased significantly in Oct 21, Mar – Jun 22 due to energy crisis
- Similar trends observed globally due to severe energy crisis led by increased demand and supply disruption
- Lower prices in last 3 years helped DISCOMs optimize their power procurement cost
- Recently in July/Aug'22, increased renewable/hydro generation and monsoon has resulted in lowering of prices at IEX

DAM: Volume & Price Trends



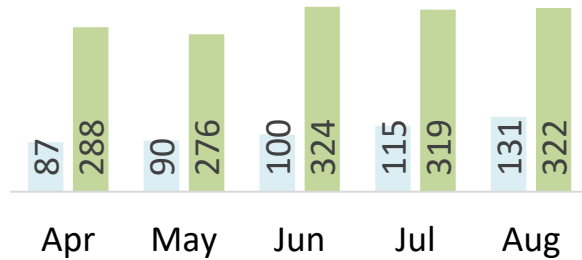
➤ Higher prices resulted in reduction in:

- ✓ OA volume without captive : till Jul'22 dropped by 58%
- ✓ Significant reduction in optimization volume by DISCOMs – Gujarat, Andhra Pradesh, Maharashtra, Punjab, Haryana

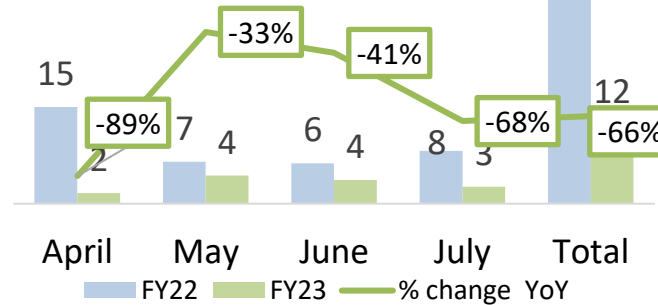
Supply Side Constraints leading to high price discoveries

Geo-Political factors have impacted international coal and electricity prices worldwide

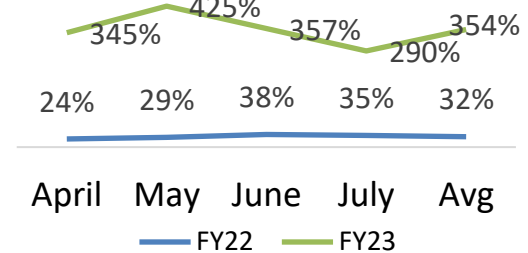
HBA Index (\$/T)



E Auction Coal Qty (MT)



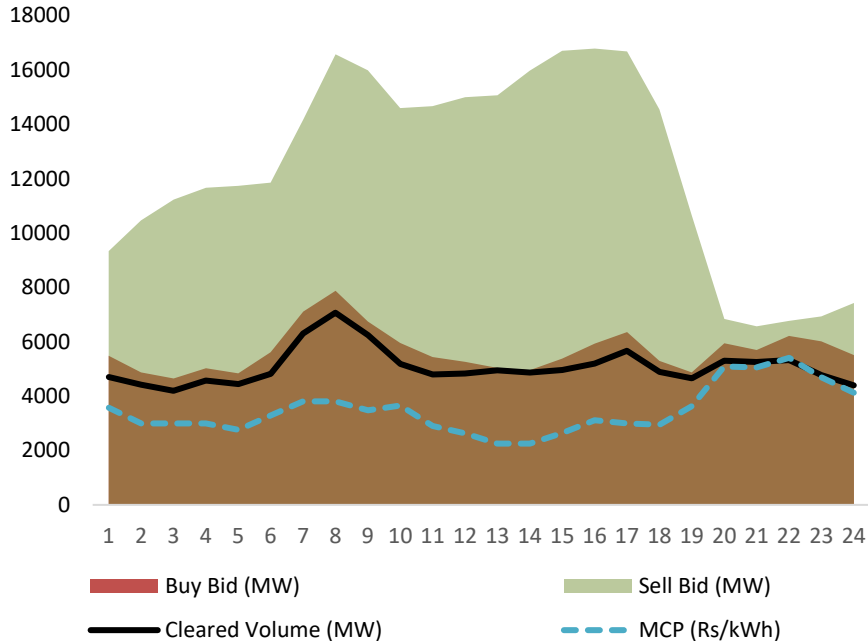
E -auction Prices above notified Price (%)



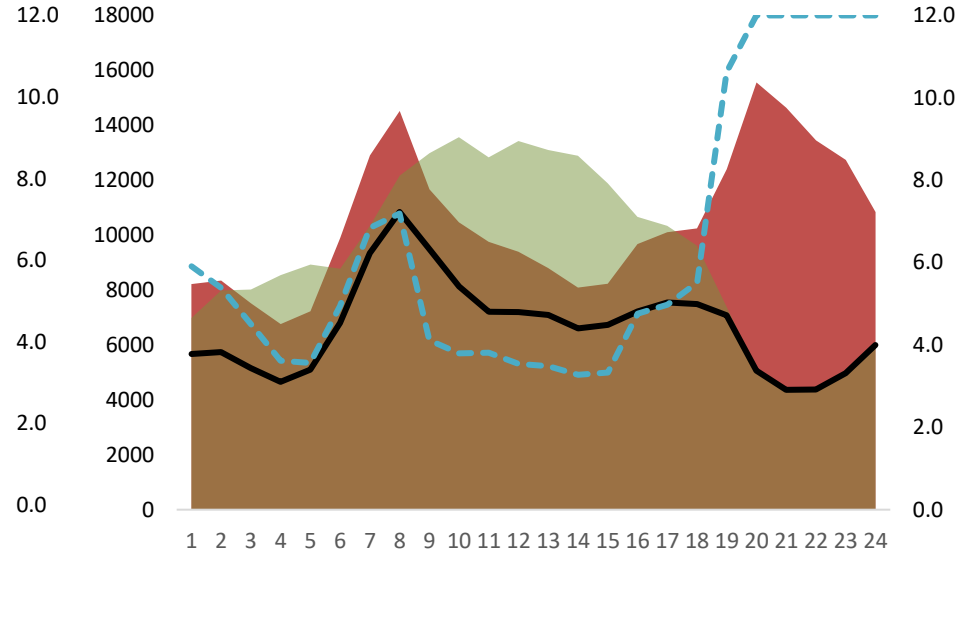
- International Coal prices have shot up by more than **192% YoY basis**
- Variable cost of imported coal- based generation has increased over **100% from Rs. 4.5/kWh to Rs. 9/kWh**
- **LNG price** increased to record high level of 54\$/MMBTU, **200% inc YoY**
- Special forward E Auction for Power Sector discontinued, Coal available under common E Auction for all sectors incl Power
- Quantity offered through e-auction has reduced to **12 MT from 36 MT, reduction by 65% YoY**
- E-auction Prices increased **350%** over notified prices in FY23

DAM Market Snapshot

28th Jul'21: RS.3.2/kWh



28th Jul'22: Rs.6.4/kWh

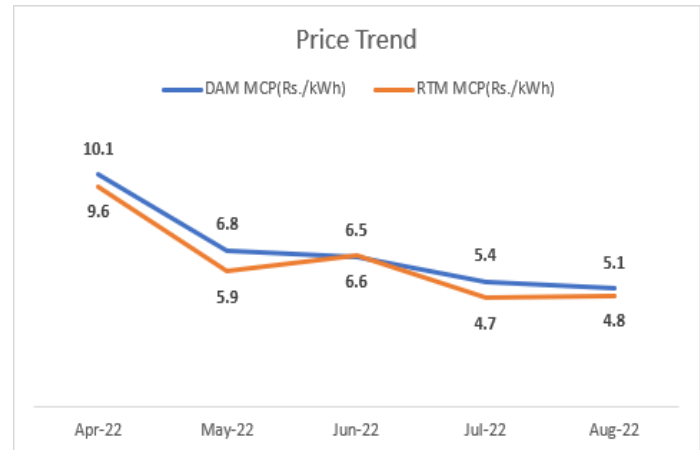
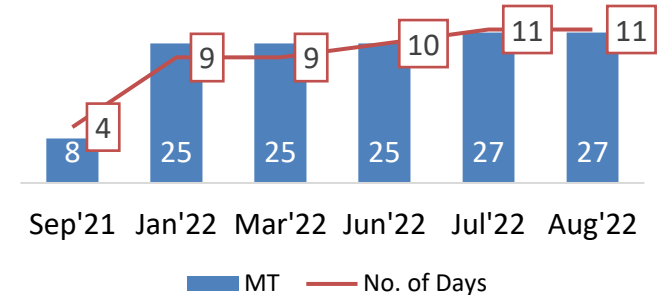


Low stock/high coal cost for IPPs leading to less round the clock sell- impacting supply/price in peak hours with lower clearance

Coal supply & Inventory

- Coal production increased by 26.5% YoY and dispatch to power sector increased by 21.3% in first 4 months of this fiscal whereas coal generation has increased at a lower rate of 16%
- Captive mines production increased by 66% YoY in first 4 months
- Coal production generally goes down during July/Aug – no impact this year. July'22 and Aug'22 production increased by 12% and 9% YoY resp
- As inventory at power plant has increased, MoP has eased coal import norms – no additional import
- Coal position expected to improve in short to medium term:
 - ✓ Mines and Minerals Act, 1957 amended to allow sell up to 50% of their annual production after meeting the requirement of the end use plant.
 - ✓ 100% FDI allowed for commercial mining; auction process of 46 blocks completed
 - ✓ CIL has offered 20 discontinued coal mines for re-opening on revenue sharing basis
 - ✓ CIL has also invested in the construction of 7 critical new rail line project

Coal Inventory at Power Plants



Price - Volume Outlook

➤ Easing supply constraints

- ✓ Improvement in coal production and higher inventory will result in increase in sell by both Discoms & IPPs
- ✓ IPPs sell will provide Round the Clock supply resulting in better availability & lower prices in peak hours
- ✓ Lower prices will lead to increase in Discoms buy as they will bid to optimize/ replace costlier power
- ✓ Open Access clearance will increase with softening of prices

➤ GNA implementation

- ✓ Implementation of GNA will lead to avoidance of duplication of transmission charges in DAM/RTM
- ✓ DAC volume will shift back to DAM/RTM where IEX command close to 100% market share

Policy Advocacy to Enhance Liquidity in the Spot Market



- Pool based CfD mechanism for RE capacity addition through the market
- Merchant RE capacity addition – 25% merchant capacity in all PPAs
- Unallocated power of the Central Generating Stations should be sold through exchange
- No renewal of existing PPAs after completion of 25 years & sell through market
- Allow aggregators to participate in the spot markets & offer fixed price contract to industrial consumers
- Generators (including renewable) can buy from the market for promoting efficiency
- Implement Gross Bidding on a voluntary basis
- Exclusive coal auction/allocation for Merchant Capacity
- Capacity Market to comply with resource adequacy obligation

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Policy and Regulatory Environment

- **Draft National Electricity Policy 2021** has targeted to **deepen the spot market** - introduce suitable market mechanism including capacity market to do away with the present rigidity of long term PPAs
- **Draft Electricity Act Amendment Bill 2022** has proposed to introduce multiple Discoms in a supply area which will promote private participation, increase Discom viability and **competitive procurement through Exchange**
- **Energy Conservation Act Amendment Bill 2022** has proposed to **establish Carbon Market** in the country. Bill has already been passed in Lok Sabha
- **Draft Electricity Amendment Rules 2005** has proposed procurement of **RE through Central Pool mechanism (leading to increased liquidity)** and framing of Resource Adequacy Guidelines by the Central Govt. Provide opportunity to **introduce Capacity market.**
- **Introduction of Electricity Derivatives:** CERC and SEBI are also working towards introduction of Electricity Derivatives in the Commodity Exchanges viz. MCX etc.

Resource adequacy, promote RE, hedging opportunities leading to deepening of Markets

Major Positive Regulatory Updates w.r.t Power Markets



- **Late Payment Surcharge and Related Matters Rules 2022**, Gencos are free to sell un-requisitioned power through Power Exchanges without obtaining any consent. Timely payments across all segments.
- **GNA Regulations** will streamline network access & transmission charges being paid by the participants. Beneficial for Exchange.
- **Draft – Sharing of Inter State Transmission Charges & Losses** will ensure avoidance of duplication of transmission charges. Will lead to shifting of transactions from DAC to DAM/RTM.
- **Green Energy Open Access Rules 2022**, will reduce OA threshold from 1 MW to 100 kW for green energy open access.

New Business Initiatives

Renewable through Markets – Merchant RE

- IEX has been working with SECI & Deloitte to conduct feasibility study of Market based models for RE capacity addition
- The study results shows that market based RE models can command an IRR of 18%-20% V/s SECI bid projects having IRR ~ 12%-14%
- This result will give a major push to Merchant Renewable. Launched the report on 24th Aug 22 through IGNITE event

Carbon Markets

- Govt aggressively working to introduce compliance Carbon Market in India. IEX working closely with Govt agencies like BEE, major Carbon Exchanges, potential players in this space
- IEX has appointed consultant to explore the business diversification opportunities in the Carbon Ecosystem

Coal Exchange

- Ministry of Coal has appointed consultant for finalizing framework for coal exchange in India
- IEX is working with MoC to explore options for setting up Coal Exchange

Future Opportunities

Virtual PPA's

- VPPA is a financial instrument used by buyers and sellers to hedge cost of electricity
- The buyer is not obligated to undertake direct physical delivery of electricity from the seller
- The seller sells the power generated at Exchange & undertakes realization from Exchange
- Bilateral settlement takes place w.r.t. contract price and buyer gets green attribute
- IEX is working with corporate houses and players like Amazon, Google etc. to implement such models

P2P Trading

- P2P trading of electricity is emerging in different parts of the world due to increasing number of Prosumers
- IEX through its MoU Partners ISGF & Power Ledger, Australia has been jointly exploring P2P opportunities

Green Hydrogen & Battery Energy Storage System

- Green markets of Exchanges (GDAM/GTAM) can be leveraged to procure RE power for green hydrogen production
- Grid scale BESS are expected to play a crucial role in large scale RE integration (CEA: 27 GW by 2030)
- IEX working with SECI & MNRE to promote use of Market options for storage tenders – Recently SECI's storage tender of 500 MW provides for 40% open capacity which can leverage Power Exchange's market
- Storage system will provide liquidity in the peak hours

Way Forward (1/2)

Growth from recently launched products	<ul style="list-style-type: none">➤ RTM: June'20➤ Green Markets: GTAM launched in Aug'20, GDAM launched in Oct'21➤ Cross Border: April'21➤ Long Duration Contracts: June'22
New Products	<ul style="list-style-type: none">➤ Ancillary Market, Gross Bidding Contract➤ Launch of Derivatives will provide price hedging opportunity and lead to lower volatility in prices thereby increasing liquidity in the spot market➤ Capacity Market➤ RE capacity through exchanges; Contract for Differences
New Business	<ul style="list-style-type: none">➤ IGX launched in 2020 and achieved breakeven within first year of operations. Robust volume growth over next 5 years expected➤ Coal Exchange➤ Carbon Market➤ Other opportunity in the energy marketplace

Way Forward (2/2)

Favorable Policy and Regulatory Initiatives

- Spot markets share to increase significantly as per Draft NEP 2021
- GNA Regulation, Sharing Regulations, Grid Code, Late Payment Surcharge Rules, and sale of un-requisitioned power on exchanges will help deepen the power markets

Coal Supply

- Government of India aims to increase coal production from current 780 Mn tonne to 1.2 Bn tonne by 2025 to further drive the availability of coal; will lead to lower electricity prices on the Exchange

Demand for Electricity

- The electricity consumption grew by 3.8% in last 5 years and is expected to further increase by 6% in next 8 years

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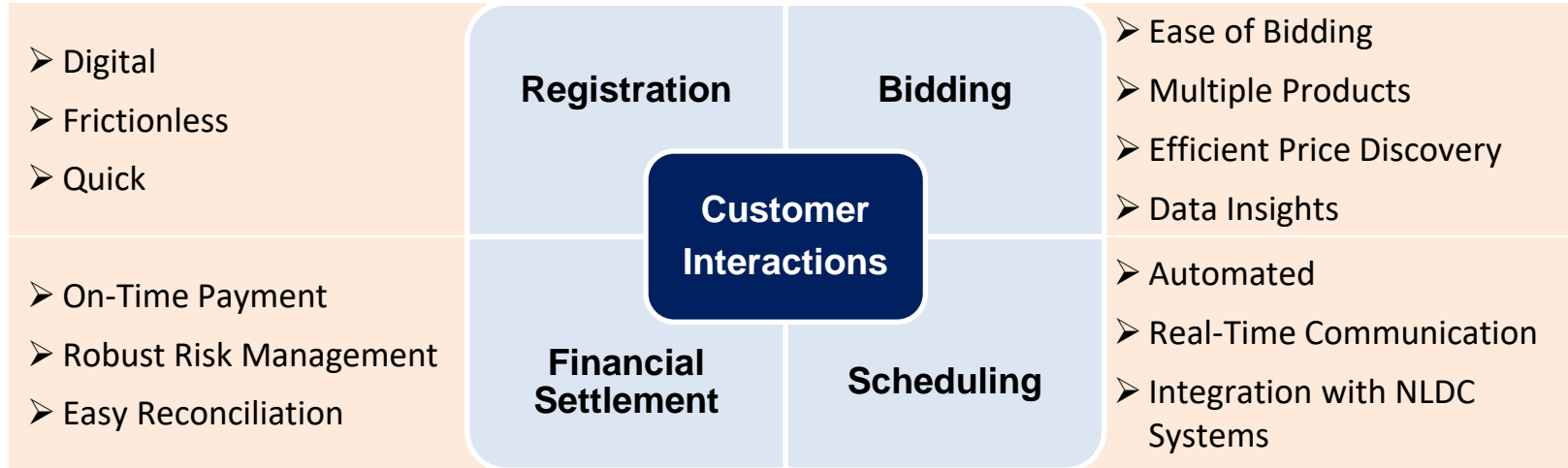
Financial Performance

Indian Gas Exchange

Creating a customer centric energy marketplace through efficient and state of the art technology solutions



Create Customer Delight for each Interaction



New Products / Contracts

2020	1st June - Real Time Market
	21st August - Green Term Ahead Market
2021	17th April - Cross Border Exchange Transactions in DAM
	26th October - Green Day Ahead Market
2022	27th June - Any-day(s) Single Side Reverse Auction
	27th June 2022 - Weekly contract for 2nd Week Delivery (earlier was available till Week 1), upto 12 Weeks to be launched on 7th September 2022
	19th July - Monthly contracts upto 3 months
	25th August - Daily contract for delivery upto 14 days (earlier was available till 11 days), upto 90 days to be launched on 9th September 2022

Customer Centricity

Ease of Bidding

- Automated Bidding through Application Programming Interface (API)
- Bid Creation Tool for creating Bulk upload bids
- Integration with the National Open Access Registry (NOAR) of POSOCO
- Auto carry forward of un-cleared bids
- Seamless DC – DR transition to ensure robust Business Continuity

Web Platform for Anytime, Anywhere, Easy and Secure Access for Members and Clients

- Data Insights
- Digital Onboarding
- Easy access to Trade and Operations reports
- Financial Reconciliation
- Web-based Bidding
- Easy User Management for creating new Users and for managing access for the Users

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Customer Centric Technology and Product Strategy

CUSTOMER CENTRIC



- **Digital Experience**
 - ✓ Secure Web Access
 - ✓ Integrated bids across segments
- **Ease of Bidding**
 - ✓ Member API launch
 - ✓ Smart Power Procurement
- **Security**
 - ✓ 24*7 Security Operating Centre (SOC)
 - ✓ Cyber Security Framework

EFFICIENT



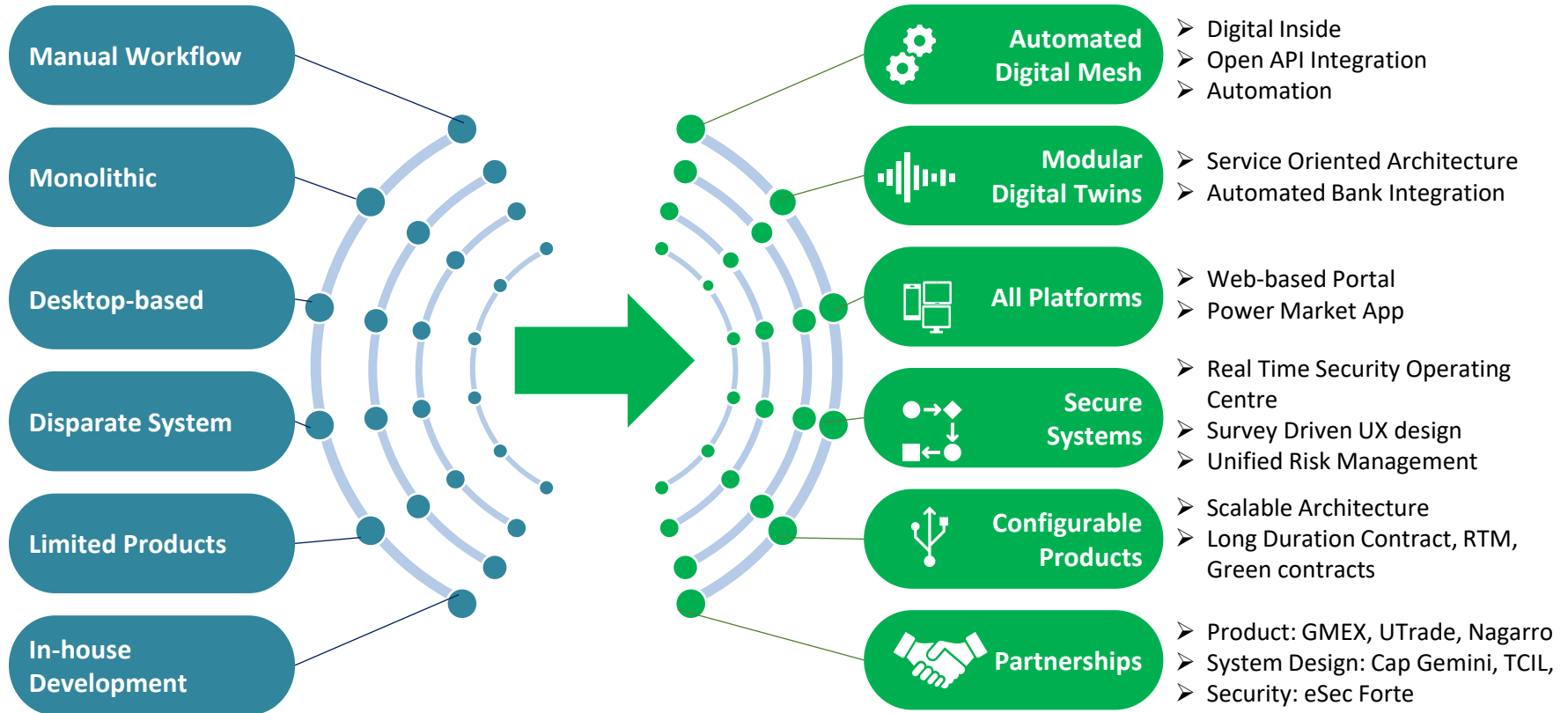
- **Comprehensive Product Portfolio**
 - ✓ Longer Duration Contract
 - ✓ Green Day Ahead Market (GDAM)
 - ✓ Cross Border Transactions
- **Automation**
 - ✓ Seamless Uptime
 - ✓ Real Time reporting
 - ✓ Alerts/Notifications
 - ✓ SAP integration
- **Scalable**
 - ✓ Hardware and Software
 - ✓ Always available system (99.9% RTM uptime)

STATE OF THE ART



- **National Open Access Registry**
 - ✓ Integration of NOAR
- **Economic Surplus/Social Welfare optimization**
 - ✓ MILP
- **Data Insights**
 - ✓ Bid Data Analytics for Senior Management
 - ✓ Power Market Data Analytics

Transitioning Towards a Futuristic Tech Architecture



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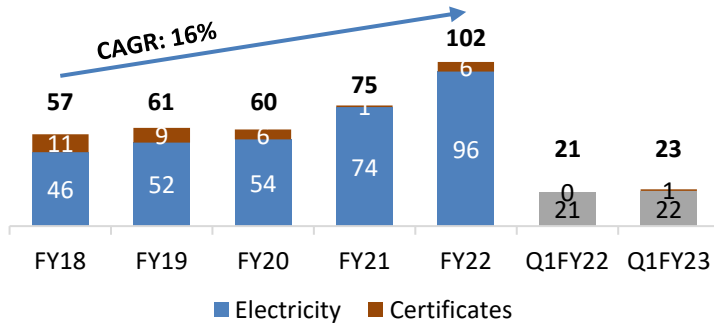
Exchange Technology

Financial Performance

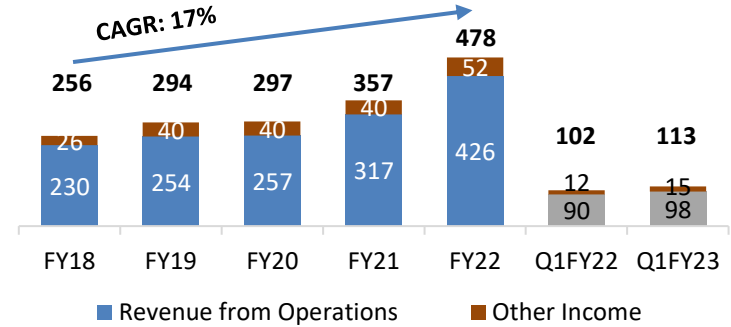
Indian Gas Exchange

Robust Performance

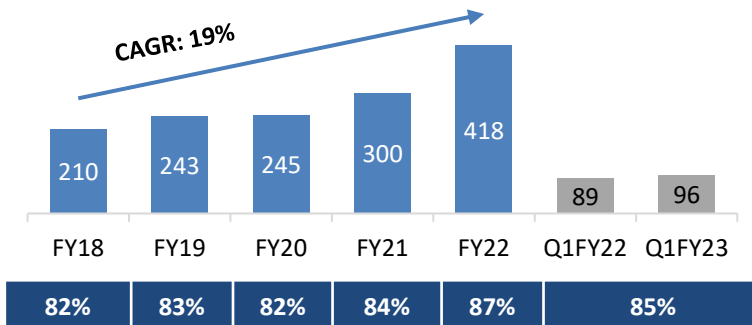
Volume (BU)



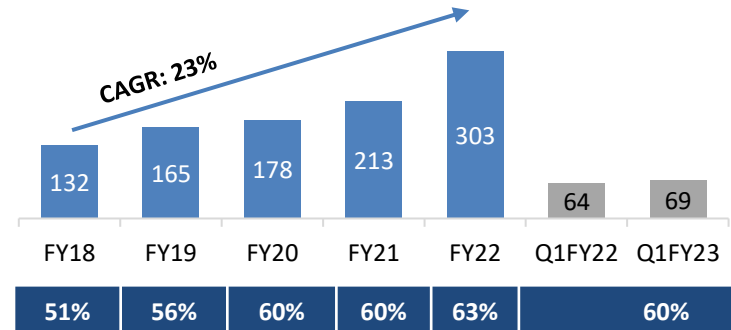
Revenue (INR Cr)



EBITDA (INR Cr)

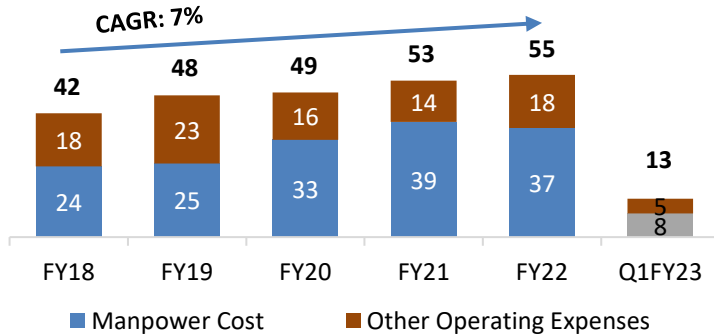


PAT (INR Cr)

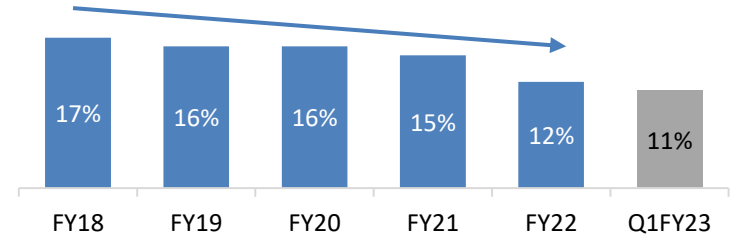


Expenses Performance

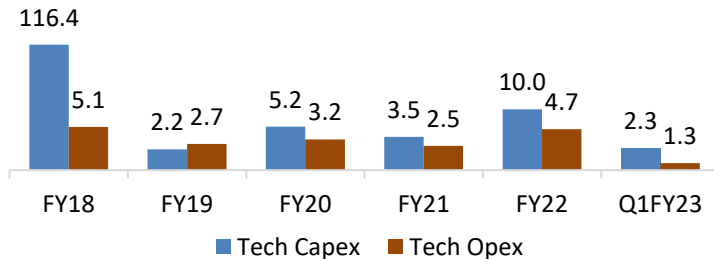
Operating Expenses (INR Cr)



Operating Expenses % of Total Income



Technology in Focus

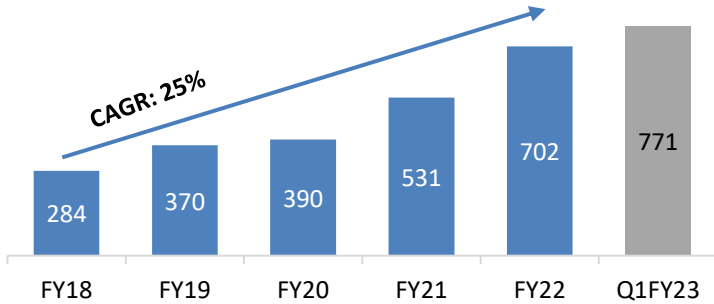


➤ Technology focused entity

- ✓ In FY 18, 115 Cr. were spent on trading platform, which has shifted from opex to capex cost model
- ✓ Major projects launched in **FY 22 & FY23 till now: MILP, Web Portal, GDAM, API Based Integration, Long Duration Contracts [LDC], National Open Access Registry [NOAR]**
- ✓ Implementation of **Mixed-Integer Linear Programming (MILP)** based exchange technology matching algorithm, at par with the global best solutions

Wealth for Shareholders

Net Worth (INR Cr)



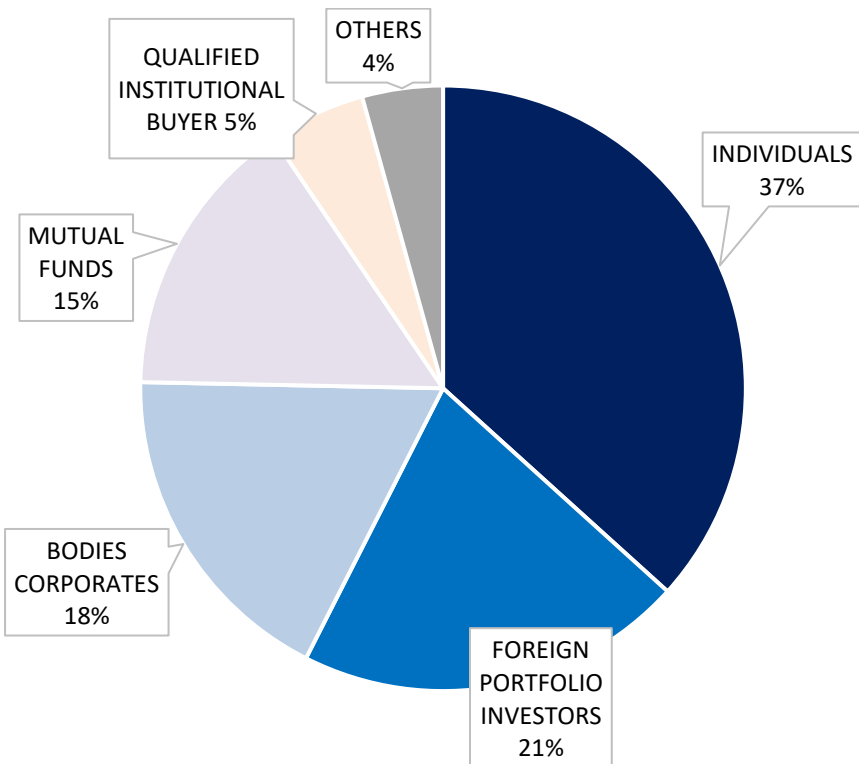
Amount in INR Cr.

Continuous payout to shareholders						
S.No	F.Y.	PAT	Buy Back of Shares	Dividend Per Share	Total Cash Pay-out	% of PAT Distributed
1	2021-22	303	-	2	180	59%
2	2020-21	213	-	4	119	56%
3	2019-20	178	-	2	90	51%
4	2018-19	165	69	-	69	42%
5	2017-18	132	-	22	80	61%

- Debt free company since inception
- Generating operating cash profits since inception and distributing dividend to shareholders. Focused on creating wealth for stakeholders as well
- Rs 650 Cr. free cash available as on 30th June 2022, Out of which, appx. Rs 90 Cr. will be distributed to shareholders as final dividend, once approved in AGM. Reserves are created to ensure IEX is future ready to explore new markets/opportunities and compete with competitors

Shareholding Highlights

Shareholding Structure as on June 30, 2022



Major Shareholders Holding > 1%

S.No.	Name of Shareholders	% of Equity
1	MIRAE ASSET TAX SAVER FUND	7.04
2	DPVL VENTURES LLP	6.96
3	PARAG PARIKH FLEXI CAP FUND	5.02
4	DALMIA CEMENT (BHARAT) LIMITED	4.14
5	DALMIA POWER LIMITED	3.71
6	WF ASIAN RECONNAISSANCE FUND	2.58
7	LIFE INSURANCE CORPORATION OF INDIA	2.55
8	ICICI PRUDENTIAL LIFE INSURANCE	1.79
9	AQUAMARINE MASTER FUND L.P	1.47
10	SMALLCAP WORLD FUND, INC	1.30

Stock Info as on June 30, 2022 :

- ✓ No. of Shares Outstanding (in MN): 898.67
- ✓ No. of Shareholders : 16,92,865
- ✓ NSE – IEX – 52 Week - H –Rs. 318.67 / L – Rs. 145.07 (per share)

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Market Models

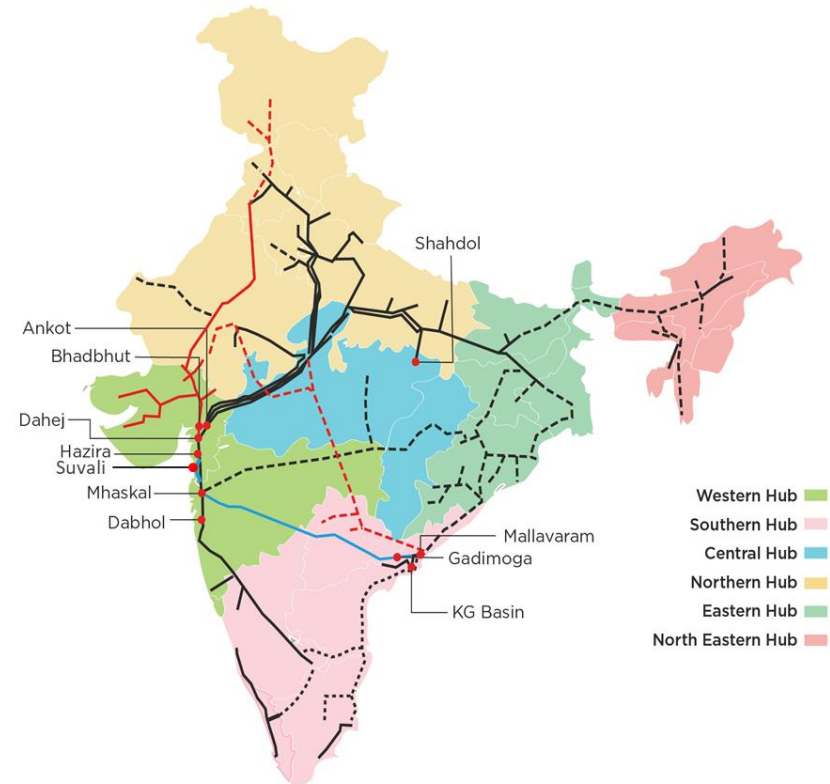
6 Regional Gas Hubs with multiple Delivery Points and 6 new Delivery Points for Domestic Gas

Total 6 contracts being traded on the exchange

Price discovery through open auction and continuous matching mechanism

INR Contracts

Minimum lot size 50 MMBtu /day or 1250 SCMD



Market Participants

Proprietary Member

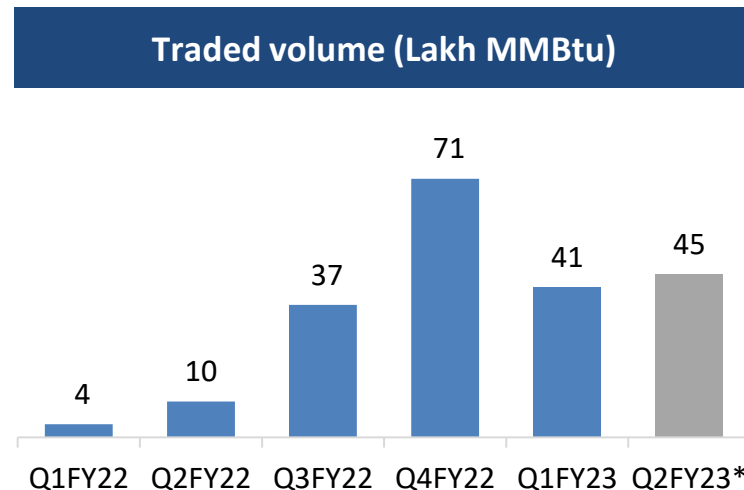


*Selected representation

IGX has 31 registered members and 75+ active clients

Business Updates

- **Total Volume Traded Since Inception** – 209.8 Lakh MMBtu
- **Achieved Break-even in first year of operations**
- **Total Registered Members & Clients:** 31 Members & 75+ Active Clients
- **FY22 Performance**
 - ✓ Total volume traded: 121.4 Lakh MMBtu
 - ✓ Highest volume traded (Mar-22): 33.33 Lakh MMBtu
 - ✓ Strategic Investors: NSE, GAIL, ONGC, IOCL, ATGL, Torrent Gas
- **FY23* Performance**
 - ✓ Total volume traded : 86 Lakh MMBtu
 - ✓ MoPNG allowed sell of Domestic Gas having M&P freedom (Aug-21)
 - ✓ Trading commenced for domestic gas on 23 May'22
 - ✓ Domestic gas trade 8.5 lakh MMBtu



*Data Till: 06th Sep 2022

Key Gas Market Enablers

Inclusion of Natural Gas under GST



Implementation of Unified Tariff Regulations by PNGRB



Implementation of new Access Code Regulations



Declaration of CGD Exclusivity (Open Access within CGD Areas)



Incorporation of TSO




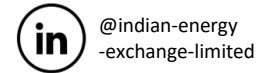
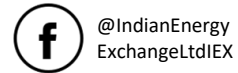
Way Forward

- Government's vision of increasing share of Natural Gas in total energy basket from ~6.3% to 15% by 2030 will increase gas consumption in the economy from current 160 MMSCMD to 500+ MMSCMD
 - ✓ With completion of 11th CGD bidding round >90% population will be covered in next 6 years
 - ✓ LNG terminal capacity is expected to grow from current 42.5 MMTPA to around 72 MMTPA in 3 years
 - ✓ Transmission pipeline network is expected to grow from ~20,000 km to around 35,000 km by 2023
 - ✓ Declaration of Open Access in CGD Areas
- Gas current spot market share is ~13 %; estimated spot market share by 2030 will be ~20%
- Gas spot market size by 2030: ~100 MMSCMD
- IGX Volume in 2030: 20% of Spot Market : ~20 MMSCMD (29 Crore MMBtu/Year)


Development of robust infrastructure along with ramp up in gas demand shall enable short term trading of gas in India



Thank you



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