

Date:- 11<sup>th</sup> September, 2023

The Manager,  
Listing Department,  
National Stock Exchange of India Ltd,  
Exchange Plaza,  
Plot No. – C – 1, G Block,  
Bandra – Kurla Complex,  
Bandra (East),  
Mumbai – 400051

**NSE Code: - PCBL**

The General Manager,  
Department of Corporate Services,  
BSE Ltd.,  
1<sup>st</sup> Floor, New Trading Ring,  
Rotunda Building,  
P.J. Towers,  
Dalal Street, Fort,  
Mumbai – 400001

**BSE Code: - 506590**

Dear Sir,

**Sub:- Intimation of Investors' Presentation**

Further to our letter dated 6<sup>th</sup> September, 2023, please find enclosed herewith a copy of the Investor presentation to be made by the Company at the Investors' Conference to be held as per the schedule referred to in our said letter.

The above information is being submitted in terms of Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015.

We request you to kindly take the afore-mentioned information in record and oblige.

Thanking you,

Yours faithfully,

For **PCBL LIMITED**

K. Mukherjee  
Company Secretary and Chief Legal Officer

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**PCBL Limited**

**Registered Office:** 31 Netaji Subhas Road, Kolkata – 700 001, West Bengal, India

**Corporate Office:** RPSG House, 4th Floor, 2/4 Judges Court Road, Kolkata – 700 027, West Bengal, India

**P:** +91 33 6625 1443 | **E:** pcbl@rpsg.in | **W:** www.pcbltd.com | **CIN:** L23109WB1960PLC024602

Note: "PCBL Limited" was formerly known as "Phillips Carbon Black Limited"



RP - Sanjiv Goenka  
Group

Growing Legacies

# RPSG Group

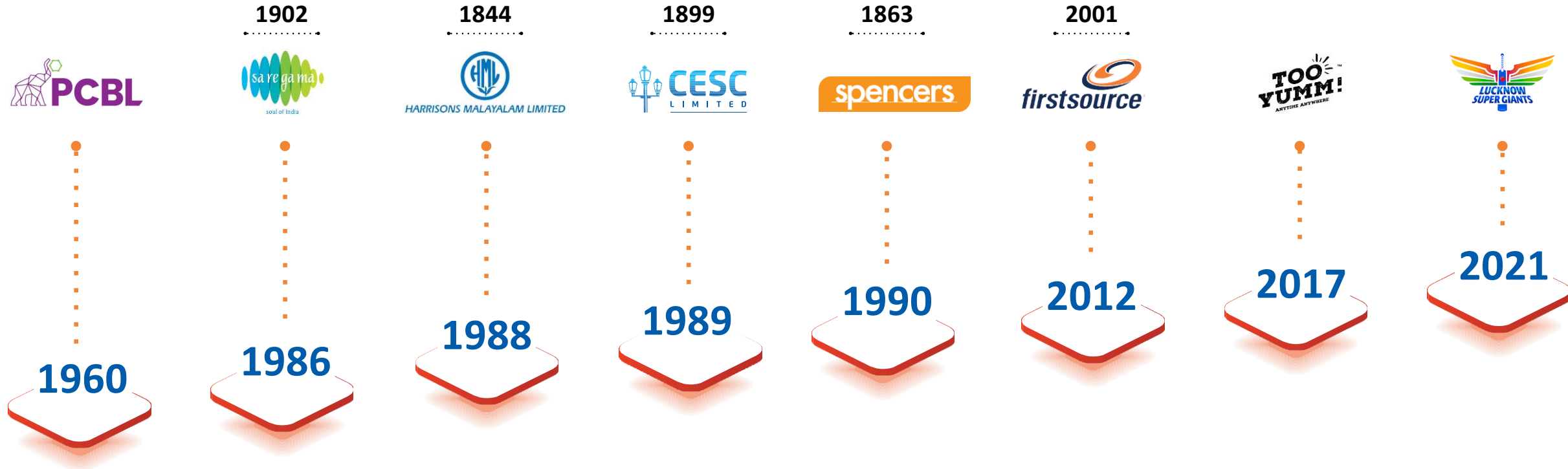
# &



# PCBL

  [www.rpsg.in](http://www.rpsg.in)

# Growing legacies



Legacy is about building the future by honouring the past. With a rich heritage, RPSG Group today is one of the most revered business conglomerates of India. The Group inspires trust and credibility through its value-driven business culture and thought leadership.

● Year of Acquisition ● Year of Incorporation

# RPSG group: Building a diversified conglomerate



One of India's **New-age and fastest growing**

conglomerates<sup>#</sup>

Presence in **45+** countries<sup>#</sup>

Strong workforce of

**50,000**

employees, belonging to different nationalities<sup>#</sup>

**100+** offices worldwide<sup>#</sup>

\* As on FY23

# Anchored to core values



We strive towards performance excellence, value-addition and strong bottom line orientation. I'm happy to say this focus has paid-off – in revenue growth, in profit growth and in valuations – all of which have grown exponentially.

**Dr. Sanjiv Goenka**  
Chairman  
RP-Sanjiv Goenka Group

## Vision

To be a responsive conglomerate driven by sustainable growth, efficiency and innovation.



**Shashwat Goenka**  
Sector Head- Retail & FMCG



**V C Agrawal**  
President Group Human Resources



**Rajarshi Banerjee**  
Group Chief Financial Officer



**Debasish Banerjee**  
Managing Director (Distribution) CESC Limited



**Rabi Chowdhury**  
Managing Director (Generation) CESC Limited



**Kaushik Roy**  
Managing Director PCBL Limited



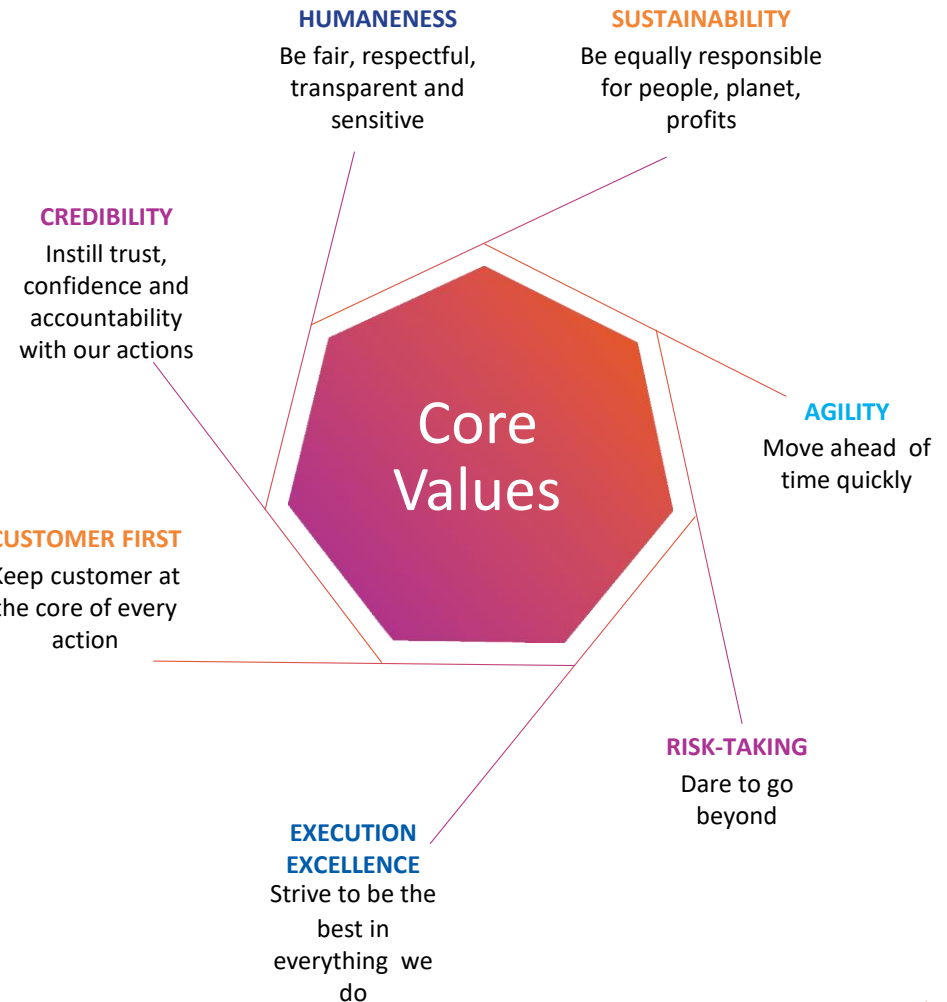
**Vikram Mehra**  
Managing Director Saregama India Limited



**Ritesh Idani**  
Managing Director and CEO Firstsource Solutions

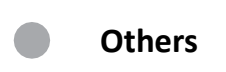
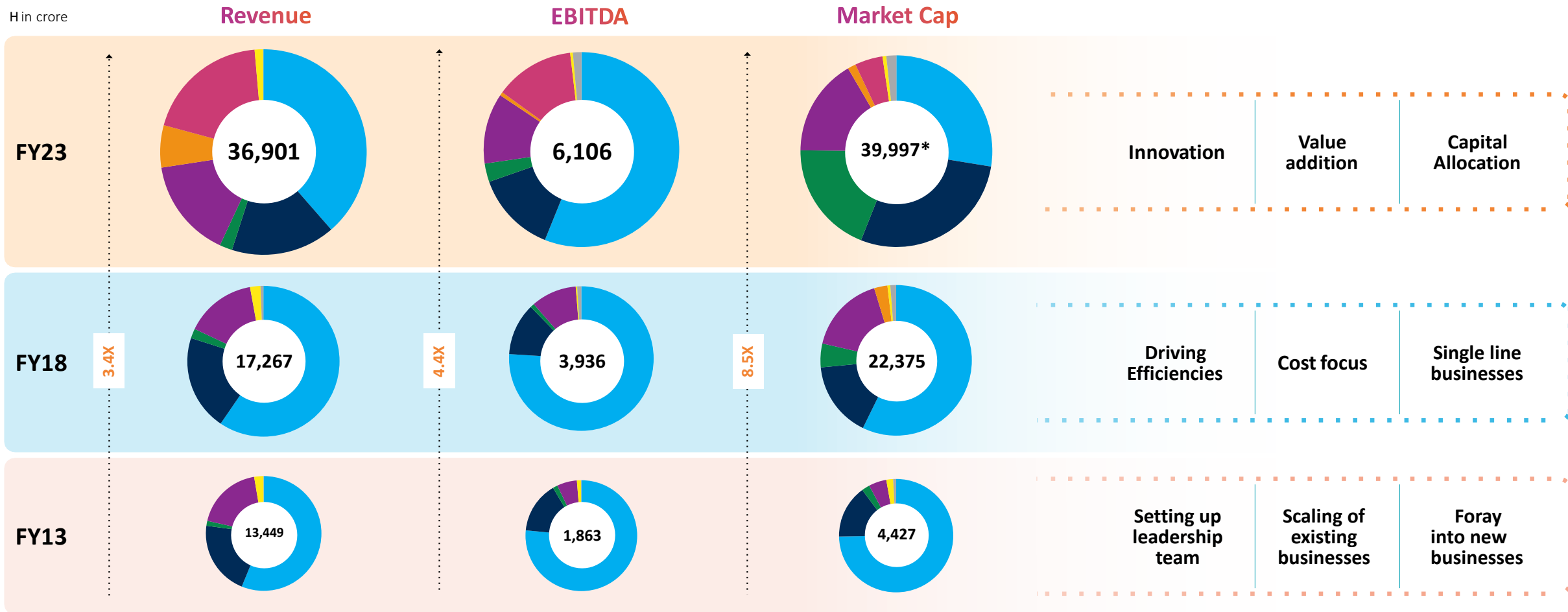


**Rajeev Khandelwal**  
Chief Executive Officer FMCG Business



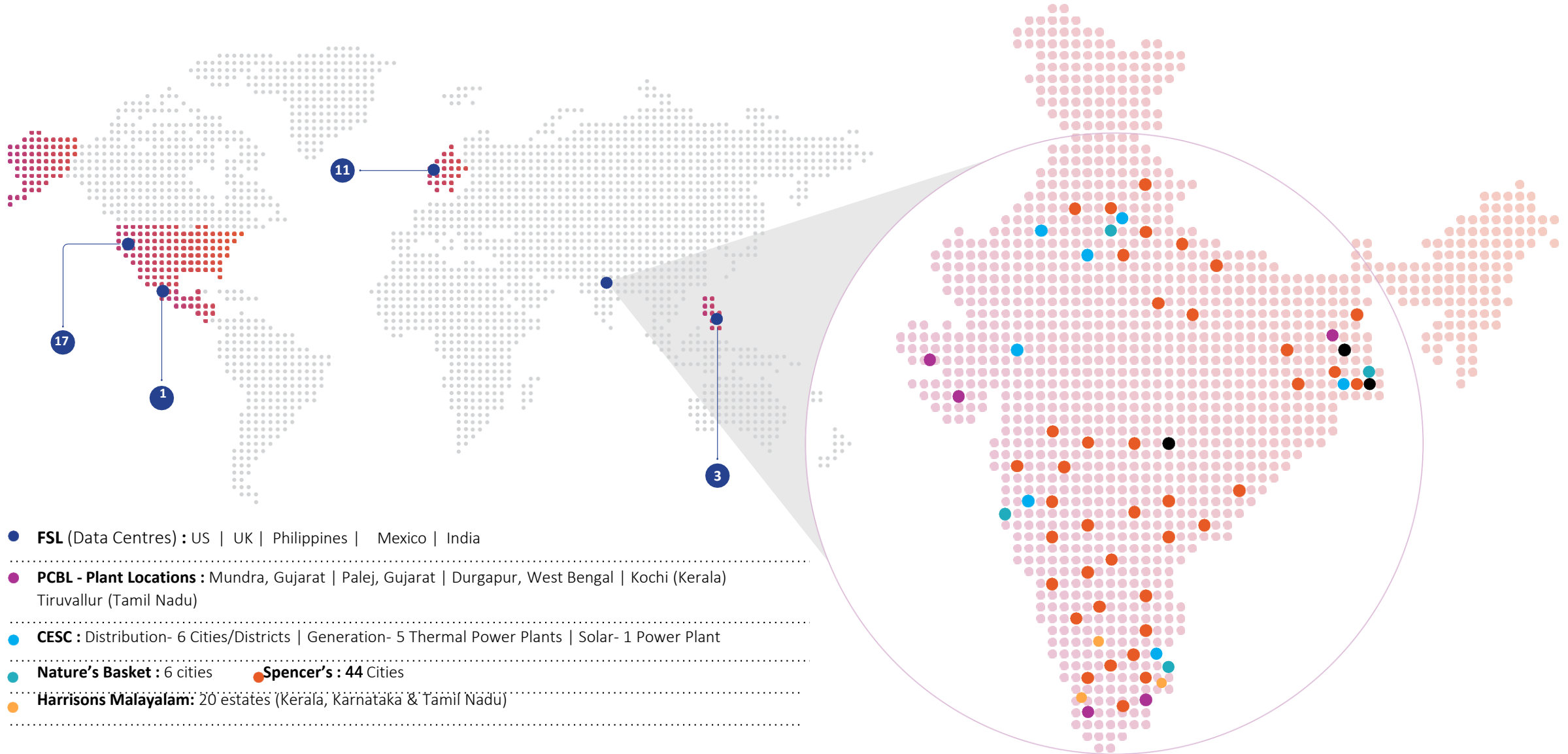
# Group's growth trajectory

H in crore



\*Market cap as on 31<sup>st</sup> Aug 2023

# Our geographical presence



- **FSL (Data Centres) :** US | UK | Philippines | Mexico | India

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- **PCBL - Plant Locations :** Mundra, Gujarat | Palej, Gujarat | Durgapur, West Bengal | Kochi (Kerala) | Tiruvallur (Tamil Nadu)

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- **CESC :** Distribution- 6 Cities/Districts | Generation- 5 Thermal Power Plants | Solar- 1 Power Plant

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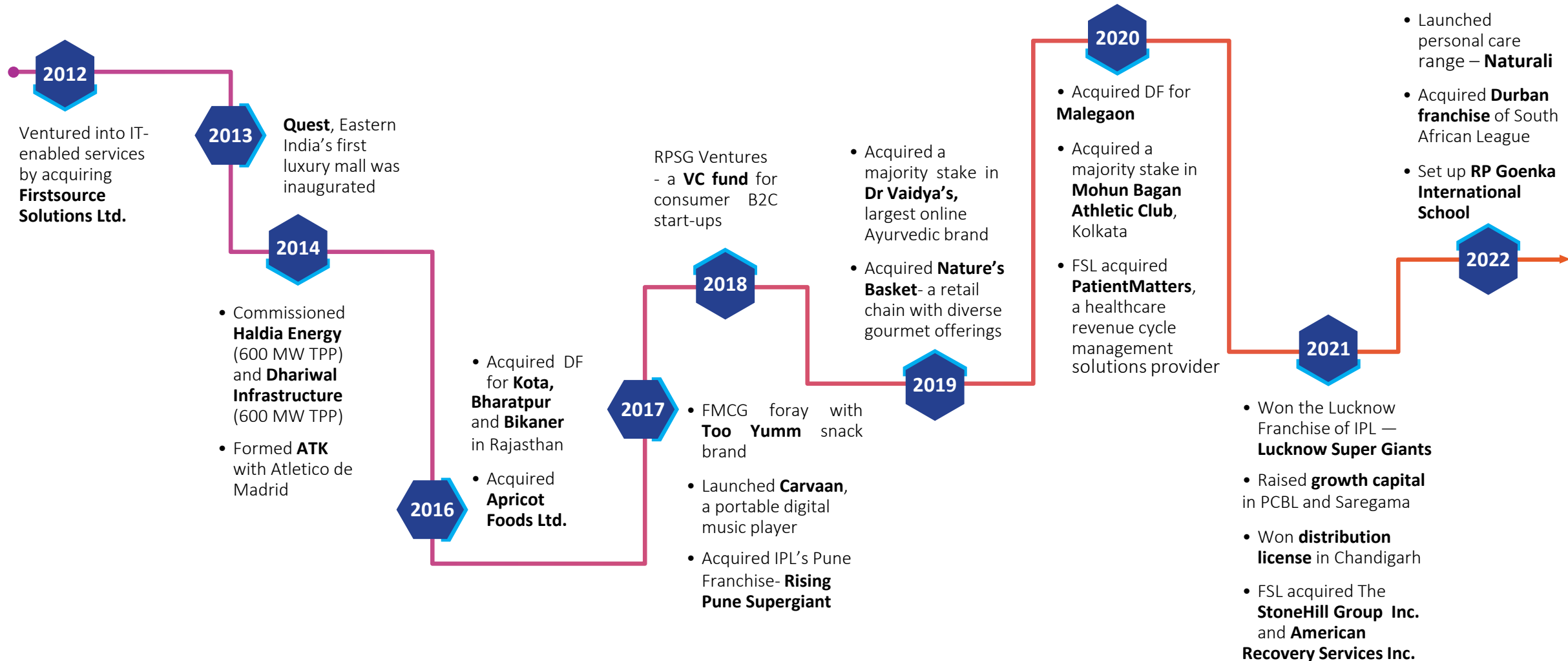
- **Nature's Basket :** 6 cities      ● **Spencer's :** 44 Cities

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- **Harrisons Malayalam:** 20 estates (Kerala, Karnataka & Tamil Nadu)

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# Our journey through the decade





## Sustainability

as one of the core values for the group – ‘Be equally responsible for people, planets and profits’

## “Great Place to Work”

CESC, Firstsource & Spencer’s

## Green Building

17 Certified Buildings & 1.6 Mn Sq Ft of Operating Area

The RP-Sanjiv Goenka Group has received the **United States Green Building Council Leadership Award** for South-East Asia 2021 for its one-of-a-kind project

Sustainability Reports – **CESC** and **PCBL** have been publishing their Sustainability reports annually for a few years now

## GHG emission reduction target

PCBL- 15% plans to reduce net Co<sub>2</sub> emission by 2030

CESC aims to reduce its GHG emissions and Carbon Footprint by 2030

## Water Conservation

All plants at PCBL adhere to ZLD regulations.

By 2030 CESC covet all power plants to be ZLD compliant

**FSL** and **HML** have **44%** & **50%** **women workforce**, respectively

Firstsource comprehended in the **2022 Bloomberg Gender-Equality Index (GEI)**

## Board Composition

FSL, PCBL, Saregama, Spencer's, RPSG Ventures, CESC - 50% Independent Directors

# Strategic priorities



Sustainably growing our businesses  
(Organic and Inorganic mix)



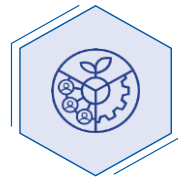
Enriching portfolio of businesses  
by increasing share of  
value-added product and services



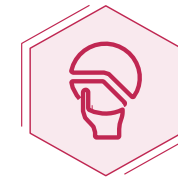
Profitable Growth  
(Focus on ROCE as KPI)



Transforming into R&D and  
Innovation led culture



ESG  
Commitment



Shareholder  
Value Creation

# Numerous Legacies Continuous Growth

# 2000 Years





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This presentation contain certain statements of future expectations and other forward-looking statements, including those relating to the Group's general business plans and strategy, its future financial condition and growth prospects, and future developments in its sectors and its competitive and regulatory environment. In addition to statements which are forward looking by reason of context, the words ‘may’, ‘will’, ‘should’, ‘expects’, ‘plans’, ‘intends’, ‘anticipates’, ‘believes’, ‘estimates’, ‘predicts’, ‘potential’ or ‘continue’ and similar expressions identify forward looking statements. All forward looking statements are subject to risks, uncertainties and assumptions that could cause actual results, performances or events to differ materially from the results contemplated by the relevant forward looking statement. The factors which may affect the results contemplated by the forward looking statements could include, among others, future changes or developments in (i) the Group’s business, (ii) the Group’s regulatory and competitive environment, and (iii) political, economic, legal and social conditions in India or the jurisdictions in which our Group operates.

The information contained herein does not constitute an offer of securities for sale in the United States or in any other jurisdiction. Securities may not be offered or sold in the United States absent registration or an exemption from registration under the U.S. Securities Act of 1933, as amended.

## PCBL- A National Pioneer and Global Player

India's largest & world's 7th largest Carbon Black Company with strong presence in specialty chemical.

Robust product portfolio with customized offerings for tyres, performance chemicals and specialty chemicals with a 'Waste to Wealth' business model.

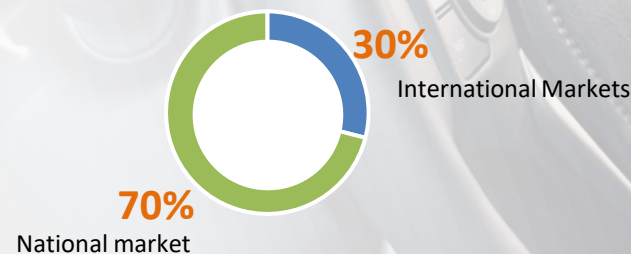
Existing 4 plants combined Annual capacity of 623 KTPA & green power generation plant of 98 MW.

Green field project at Tamil Nadu with Annual capacity of 147 KTPA & green power generation plant of 24 MW

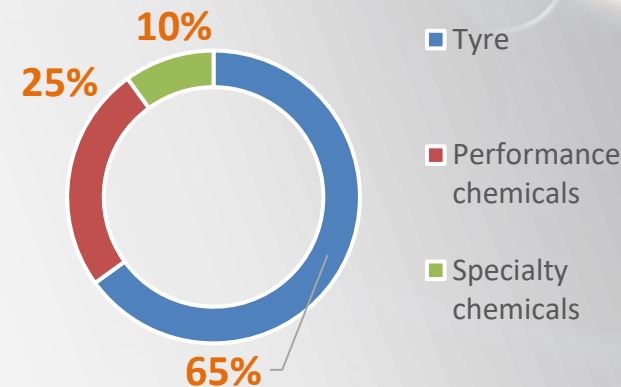
R&D, innovation & technology are key focus areas for the company (new product development, process innovation & fundamental research) with R&D centres in India & Belgium.

Established market presence with major tyre, specialty and performance chemicals customers in more than 50 countries worldwide.

Revenue by Geography



Revenue by Segment



**4 + 1**  
Manufacturing facilities

**100+**  
Grades

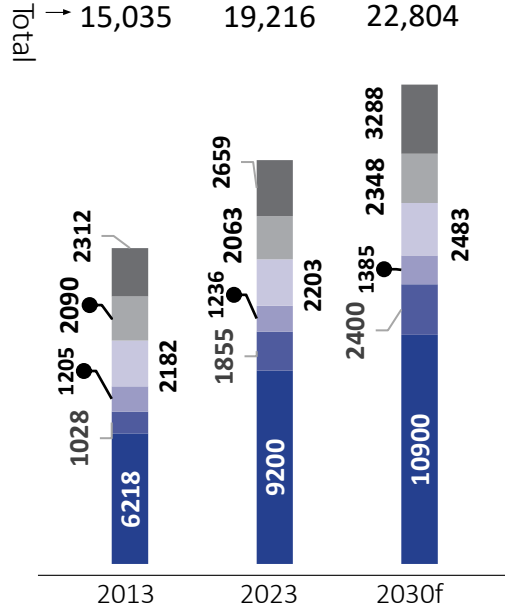
**65+**  
Grades of speciality Chemicals

**50+**  
Countries

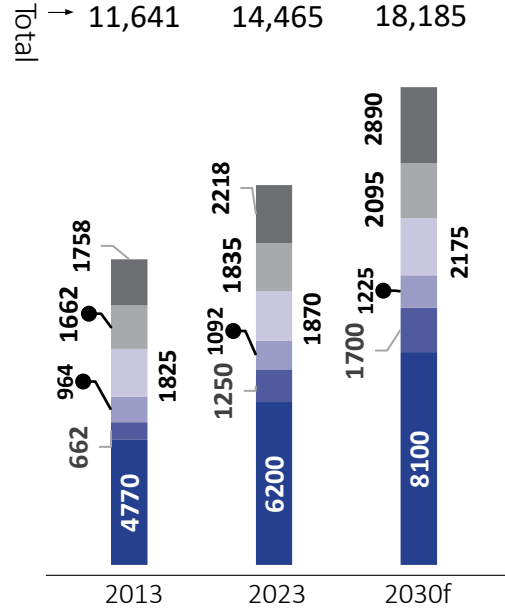
**120+**  
Customers of Speciality Chemicals

**1175+**  
Employees

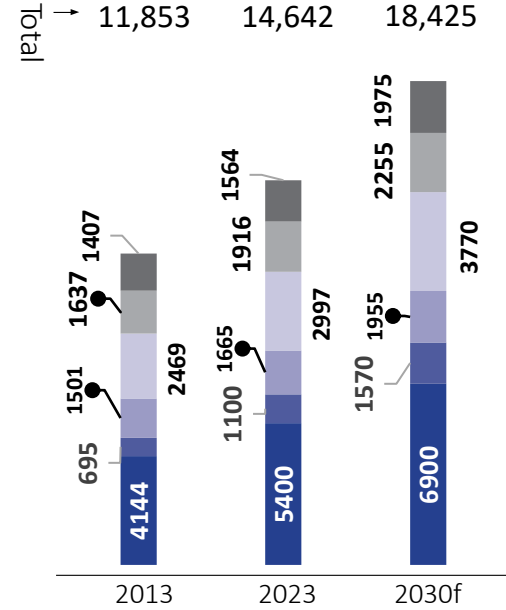
**Capacity Data (KTPA)**



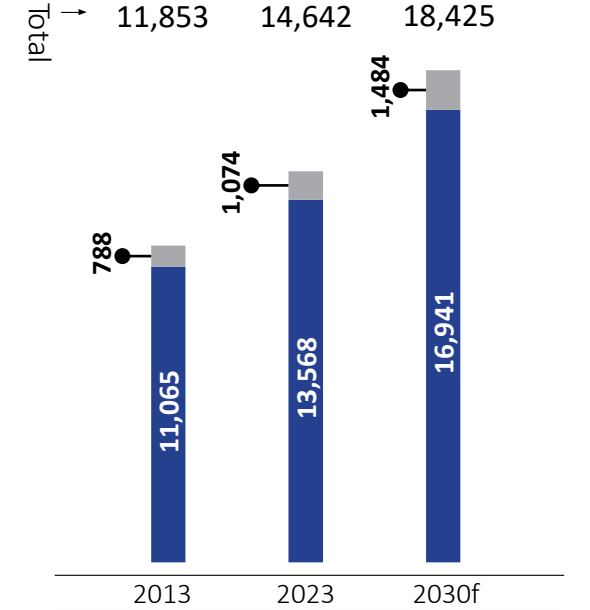
**Production Data (KTPA)**



**Demand Data (KTPA)**



**Demand Data (KTPA)**



● China ● India ● European Union ● Asia (Excl. China & India) ● North America ● Others

● Rubber Black ● Specialty

Global Capacity has grown at 2.5% CAGR over the past decade in line with global demand growth

Capacity growth in North America & European Union has remained stagnant in last decade & the same is forecasted to be low by 2030

Indian capacity has grown at 6% CAGR over the last decade which indicates strong domestic market & export competitiveness

Global demand is expected to grow at 3.5 % CAGR by 2030. India's demand is expected to grow at 5-6% CAGR, which strengthens India's position as the strongest market

Source: NOTCH Carbon Black world data book



Tyre



Conveyor belt



Industrial hoses



Food plate



Electric wire



Print ink



Camera body



Automobile component

## Rubber Black

(90% of the PCBL total volume & 93% of the Global industry total volume)

## Specialty chemicals

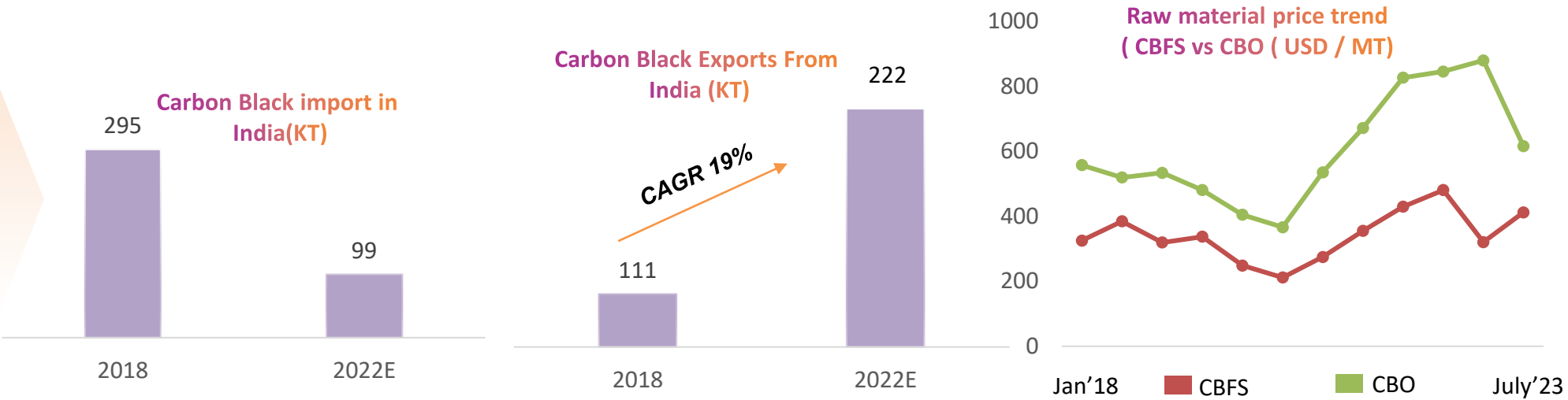
(10% of the PCBL total volume & 7% of the Global industry total volume)



# Favourable Tailwinds & Opportunities

Cost competitiveness & opportunities in India supporting Multinational companies adopting China+ strategy .

Reduction in India's Carbon Black import & Increase in India's Carbon Black Exports



## Opportunities in India



Favourable Demography



Supportive Government Policies



Rising Share of Middle Class & improving Consumer Spending power

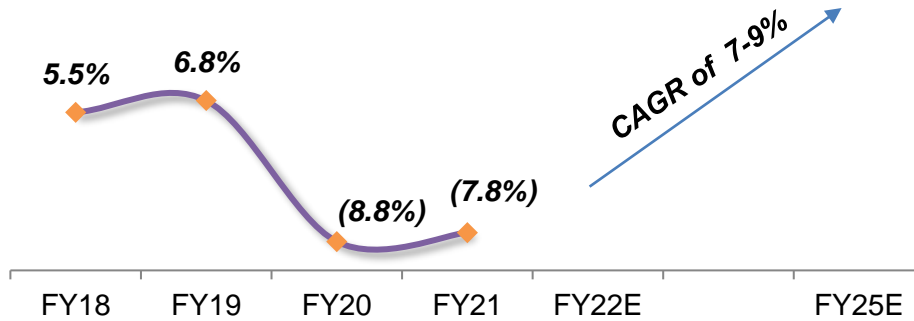


Low Per Capita Consumption

# Favourable Tailwinds & Opportunities

## Indian Tyre Industry Growth and Key Drivers

**Indian Tyre Market Growth**



Acceleration in economic activity – infrastructure spend , freight movement

Post COVID increase in preference for personal mobility

Vehicle scrappage policy

Recovery in OEM segment & steady replacement market

Growing demand for EV & SUV tyres

Lower competition from imports with increased import restrictions

## Indian Tyre Industry Key Trends



### Demand Recovery

Tyre demand is estimated to grow by 8-9 % in FY24 with growth recovery in OEM and replacement segments



### Exports Growth

Tyre exports witnessed healthy growth of 9% in FY23 driven by growth in passenger car , agri & construction sectors and increased acceptance for Indian tyres globally



### Imports Reduction

Tyre import in India still much below pre COVID  
Continuing the trend , radial truck & bus tyre imports fell by 46% in FY23



### Significant Capex

INR 35000 crs of investment by tyre industry in last 3 years in capacity creation & debottlenecking

## Largest Carbon Black Company in India

| Company                     | Domestic Capacity (KT) |
|-----------------------------|------------------------|
| PCBL                        | 770                    |
| Birla Carbon India          | 315                    |
| Himadri Specialty Chemicals | 180                    |
| BKT (Balkrishna Tyres)      | 200                    |
| Epsilon Carbon              | 115                    |
| Continental Carbon India    | 235                    |



**7<sup>th</sup> Largest** carbon black company globally

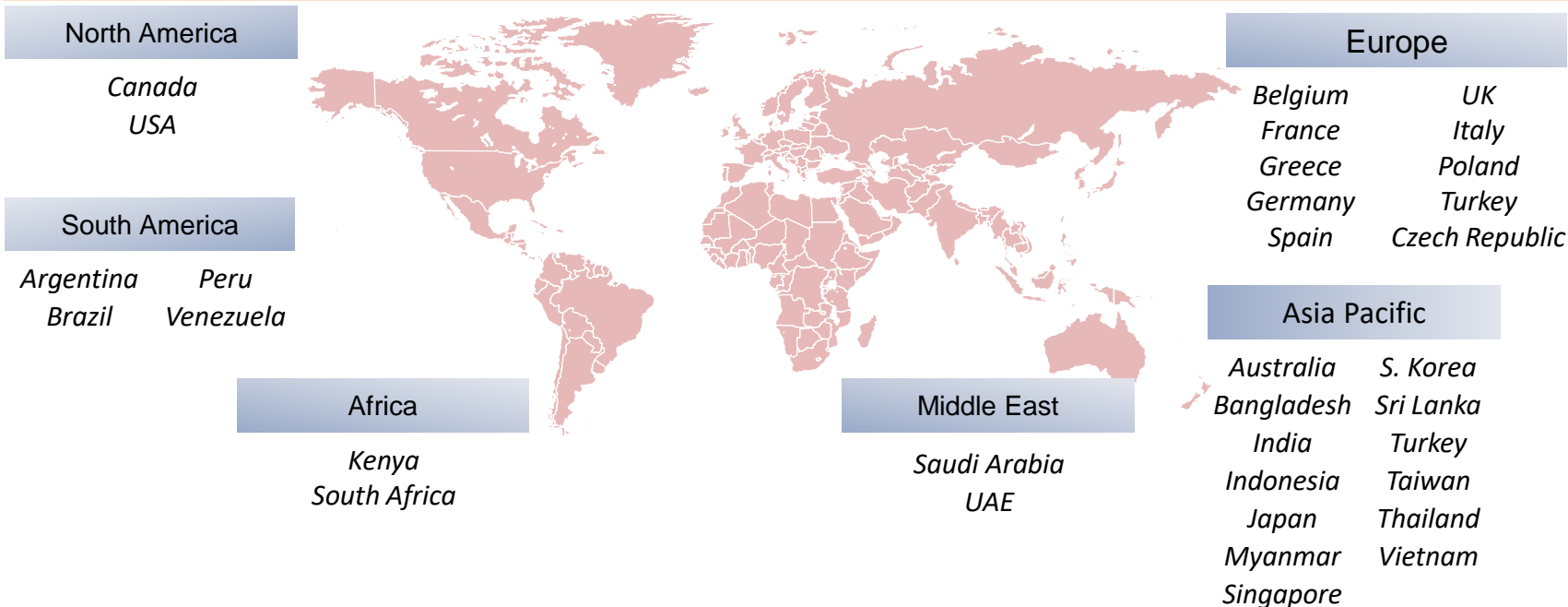


Presence across **50+ countries**



PCBL exported ~140 KT in FY23

## Strong Global Footprint



Multiple Global Offices across Europe and Asia



Decanting stations across USA, Europe and Asia



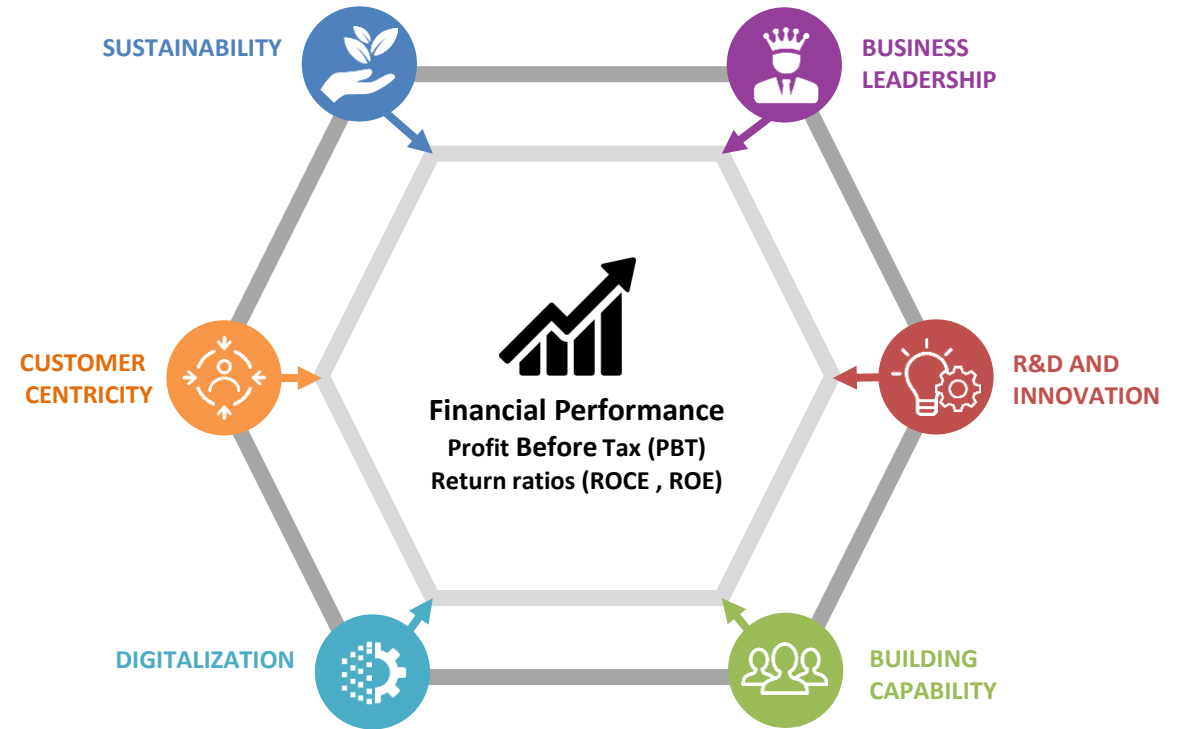
Innovation center in Belgium & R&D center in India

# Transformation Journey

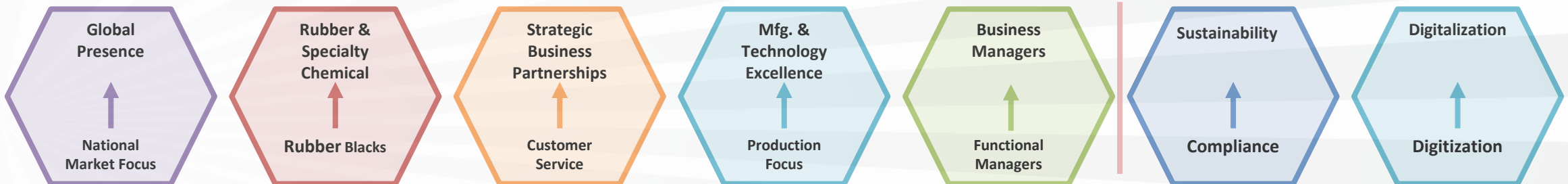
## VISION

*A trusted Global player providing cutting edge solutions to our Partners and an exciting workplace to our People*

## 7 Business Themes



## Strategic Imperatives



# Experienced Leadership Team



### **Kaushik Roy – Managing Director & CEO**

- Around 30 years spread over Apollo Tyres, Gujarat Ambuja Cement, and PCBL
- Was Indian Tyre Industry Representative on the Industry Body of International Rubber Study Group, Singapore; and also the Member of Governing Council, RSDC (Rubber Skill Development Centre), India.
- MTech (Mechanical), IIT Kharagpur; MBA, University of Tokyo; Alumnus of IMD – Switzerland



### **Kaushik Mukherjee - Company Secretary & Chief Legal Officer**

- He started his career with CESC Limited in 1993 and has since been working with the Group, with a cumulative experience of 31 years
- B.Com. (H) from Calcutta University, CA from ICAI, CS from Institute Of Company Secretaries Of India



### **Raj Kumar Gupta - CFO**

- He started his career with CESC Limited in 1998 and has since been working with the Group for more than 25 years
- B.Com(H) from Calcutta University, CWA from ICWAI, CA from ICAI



### **Lohit Shringi - Chief - Specialty Blacks**

- Around 25 years across chemical, automotive, electrification, EV batteries etc.
- Worked more than 16 years in DuPont in various capacities.
- B.Tech from University of Rajasthan) ; MBA from MDI Gurgaon



### **Gautam Kalia - Chief International Markets, Rubber Blacks**

- Around 27 years comprising L&T Ltd and PCBL
- B.Tech (Mechanical) - University Topper & Gold Medalist, Rani Durgavati University, Jabalpur; PGDGM, XLRI Jamshedpur



### **Sabyasachi Bhattacharya – Chief - HR & IT**

- More than 25 years spread over Reckitt Benckiser, Coates of India, Hutchison, Haldia Petrochemical, Berger Paints, Saregama India Ltd, Sherwin Williams and currently PCBL
- BA (Hons), University of Calcutta; MBA, IISWBM



### **Vijay Joshi – Chief Operations**

- 30+ years of experience
- Worked previously in Deepak Fertilisers, Bombay Dyeing, Futura Polysters, Century Enka.
- BE from Pune University, Diploma in Business Management from Pune University, Masters in Management Science from Pune University, PG Diploma from MSBTE – Mumbai, Executive General Management Programme from IIM – Bangalore.



### **Jiten Keluskar - Chief Procurement Officer**

- More than 33 years comprising Reliance Industries Ltd, Cummins India Ltd, Mahindra & Mahindra Ltd, Siemens Ltd, Crompton Greaves Ltd, ACC Ltd (Mumbai)
- BE from Walchand College Of Engineering, PGDM from Govt Polytechnic Bandra, CWA from ICWAI, CPM from Institute Of Supply Management



### **Mainackya Ghosh - Chief - National Markets, Rubber Blacks**

- 24 years spread over ICM (Export House), ITC (Tobacco Division India), Orind Refractories Ltd, Liaoning Birla Carbon Company Ltd, Qingdao Eastlion I&E Co Ltd, Continental Carbon India Ltd, Himadri Chemicals & Industries Ltd and currently PCBL
- B.Com (H) from Calcutta University, PGDM from International Management Centre



### **Valerie Smits – Head – Global R&D**

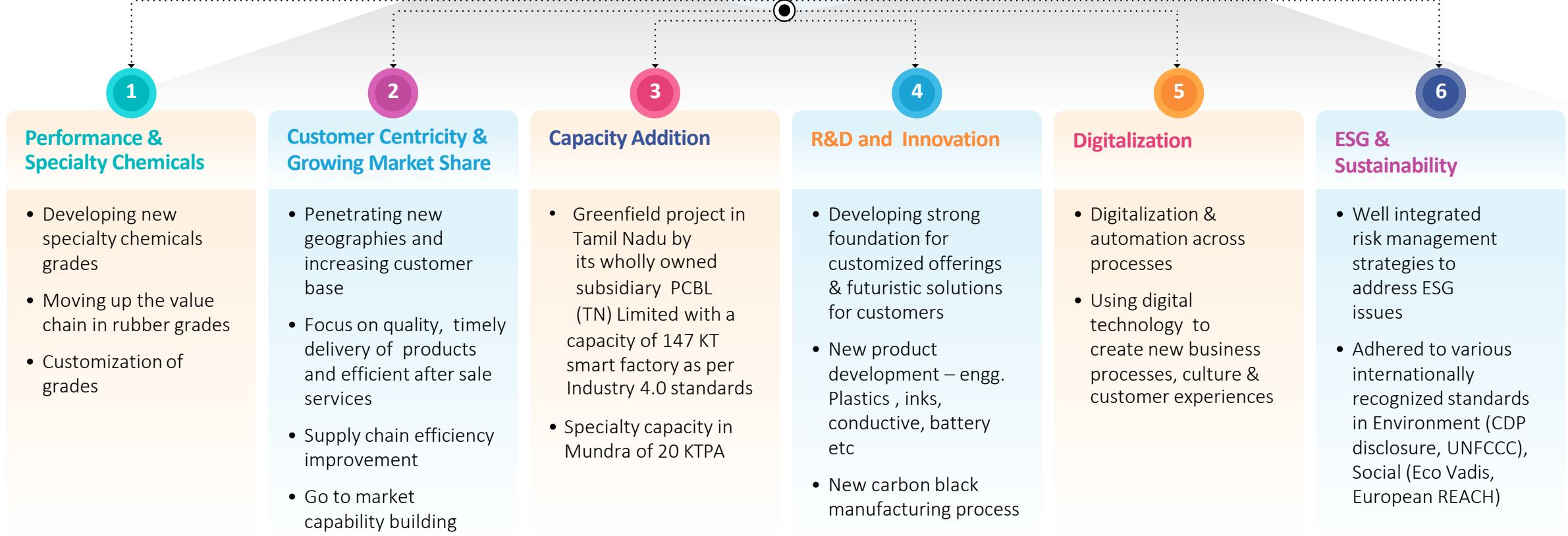
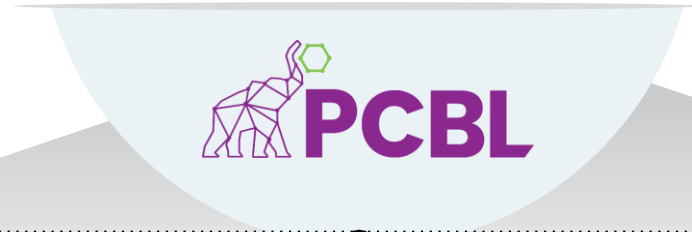
- 24 years spread over TOTAL, DOW CORNING, SABIC, IMERYS
- M. Tech from UMons Belgium & TUHH, Germany



### **Sudipto Kumar Ghosh – Head - Projects**

- Around 28 years of experience comprising Saurashtra Chemicals, Arvind Mills Ltd., Paharpur Cooling Towers and PCBL
- B.Tech from REC Surat, PGDBA from Symbiosis Centre for Distance Learning

# Growth Strategies



1

## Performance & Specialty Chemicals

- Developing new specialty chemicals grades
- Moving up the value chain in rubber grades
- Customization of grades

2

## Customer Centricity & Growing Market Share

- Penetrating new geographies and increasing customer base
- Focus on quality, timely delivery of products and efficient after sale services
- Supply chain efficiency improvement
- Go to market capability building

3

## Capacity Addition

- Greenfield project in Tamil Nadu by its wholly owned subsidiary PCBL (TN) Limited with a capacity of 147 KT smart factory as per Industry 4.0 standards
- Specialty capacity in Mundra of 20 KTPA

4

## R&D and Innovation

- Developing strong foundation for customized offerings & futuristic solutions for customers
- New product development – engg. Plastics , inks, conductive, battery etc
- New carbon black manufacturing process

5

## Digitalization

- Digitalization & automation across processes
- Using digital technology to create new business processes, culture & customer experiences

6

## ESG & Sustainability

- Well integrated risk management strategies to address ESG issues
- Adhered to various internationally recognized standards in Environment (CDP disclosure, UNFCCC), Social (Eco Vadis, European REACH)

# Specialty Chemicals- Developing New Products



From films and fibres to pipes and wires, our products are customized to meet our customers' every need.

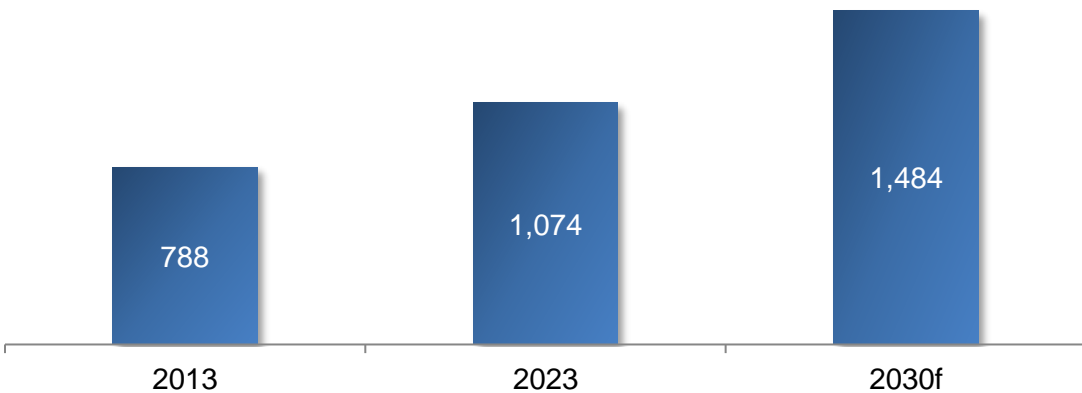
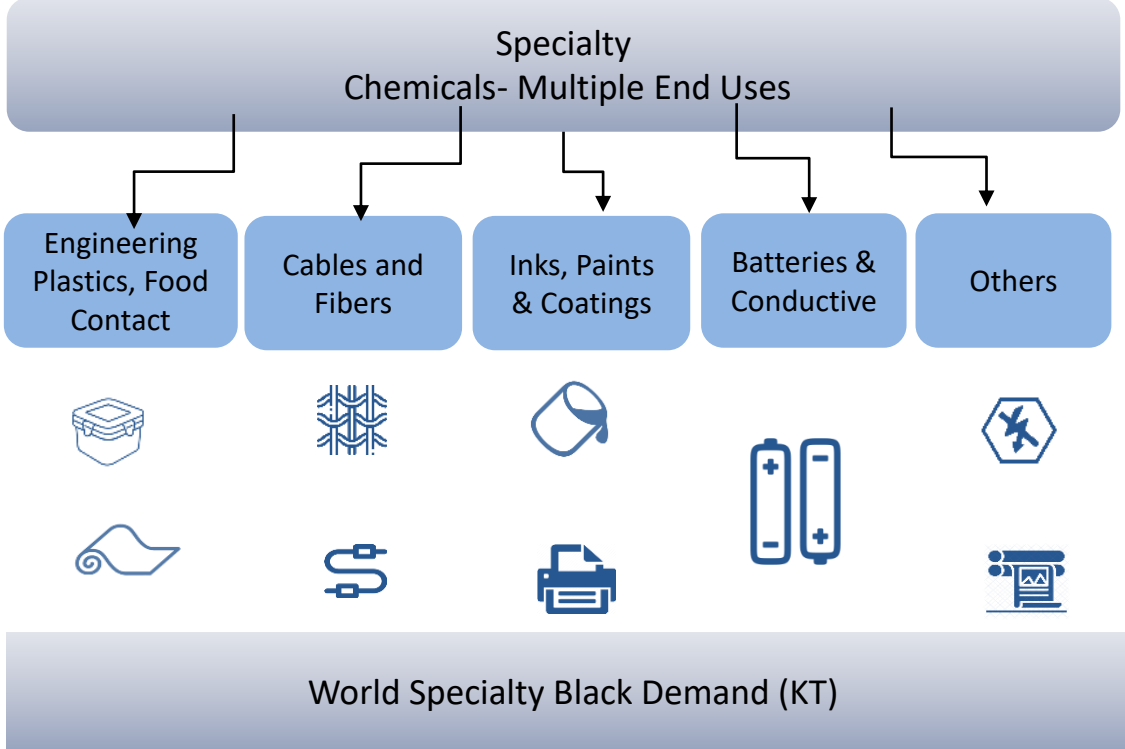
Major areas of focus include conductive grades and other specialty applications

Brownfield Expansion at Mundra plant, Gujarat. Total Specialty Chemical capacity after all expansions – 112 KT.  
1<sup>st</sup> Phase 20,000 MTPA of 40,000 MTPA Specialty Chemical capacity at Mundra Plant commissioned on 10<sup>th</sup> July 2023.

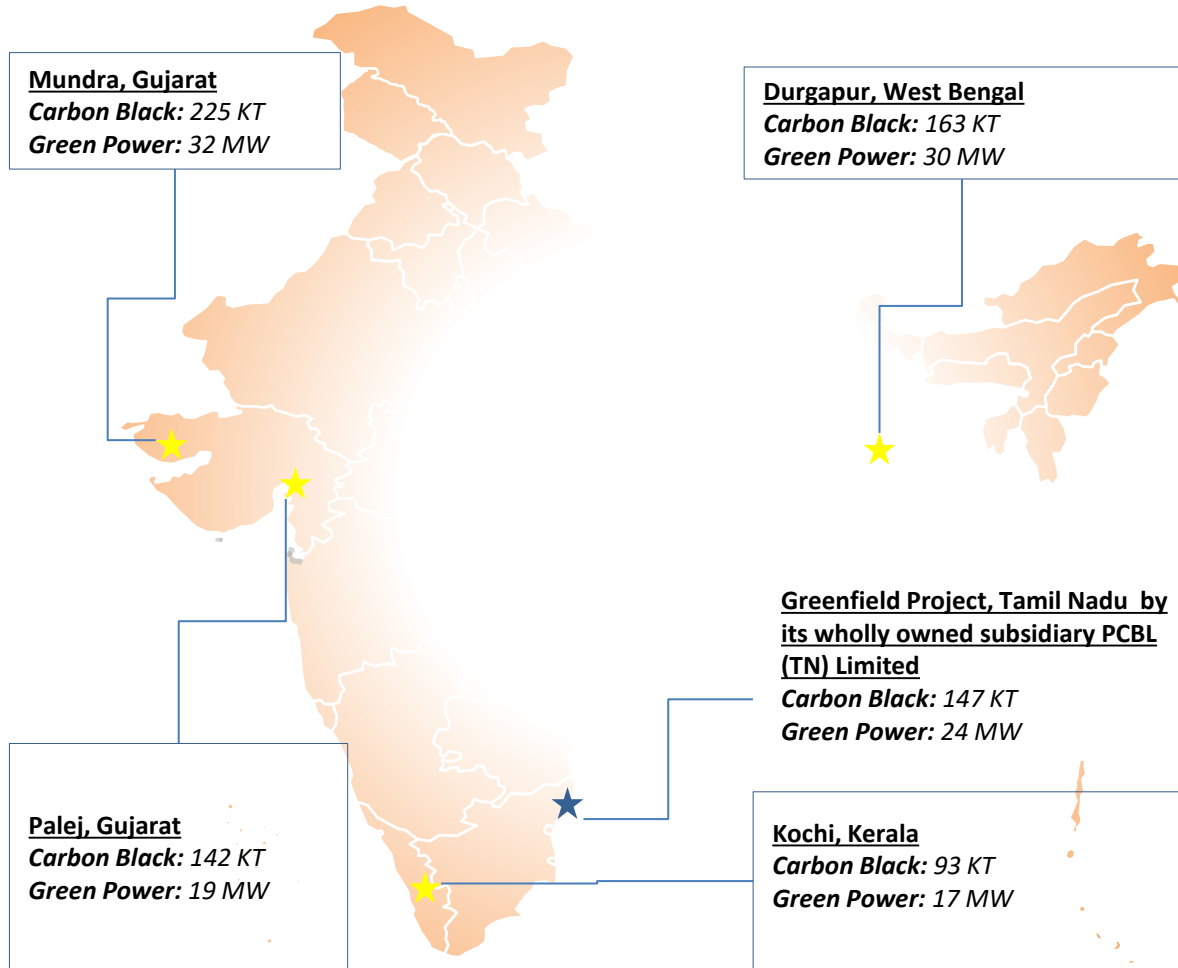
R&D work is going on for advanced & complex applications of specialty black.

**Our Brands**

- Royale Black**
  - Bleumina®** for engineering plastics
  - NiUTONE™** for inks, paints, and coating applications
  - Energja™** various conductive applications like conductive polymers, ESD, wires & cables and batteries



# Strategically Located Manufacturing Facilities with Planned Capacity Additions



## Key Features

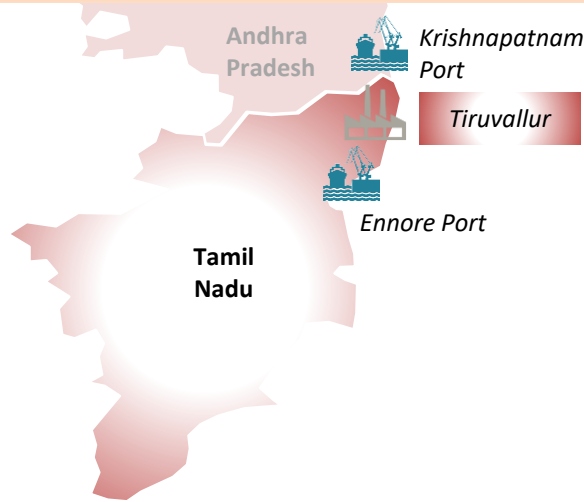
- 1 **Easy access to raw materials** and international customers with proximity to ports
- 2 **Lower logistics cost** on account of well spread manufacturing facilities and proximity to customers
- 3 **Lower risk of business interruption** with multiple manufacturing location spread across India
- 4 Co-generation of green power using tail gas at all manufacturing facilities with capacities to **serve captive consumption as well as third party sale**
- 5 **Easy grid connectivity** for sale of surplus green power
- 6 Seamless capability to **switch between alternative feedstocks**
- 7 Certifications include **WASH, ISO and IATF**

**Total Carbon Black Capacity: 770 KT | Total Green Power Capacity: 122 MW**



# Strategically Located Manufacturing Facilities with Planned Capacity Additions

Greenfield Expansion in Tiruvallur (SIPCOT Industrial Park), Tamil Nadu by its wholly owned subsidiary PCBL(TN) Limited



Carbon Black Capacity of 147 KT



Power Capacity of 24 MW (Green Power)

## Key Features



### Smart Factory

Smart Factory with incorporation of Industry 4.0 concepts using machine learning and artificial intelligence for process control



### Green Factory

IGBC platinum green factory building certification, zero liquid discharge plant, rain water harvesting & water conservations



### Automation

Automated & advanced material handling and warehouse management system. Fully automated process control through DCS



### Proximity To Ports

Located close to Krishnapatnam port & Ennore port enabling easy import of raw materials (CBFS) and export sales



### Multiple Lines

The plant will be equipped with three independent production lines (2 lines for hard black and 1 line for soft black)

# Strong Focus on R&D for Expansion of High Margin Product Portfolio

## R&D Infrastructure



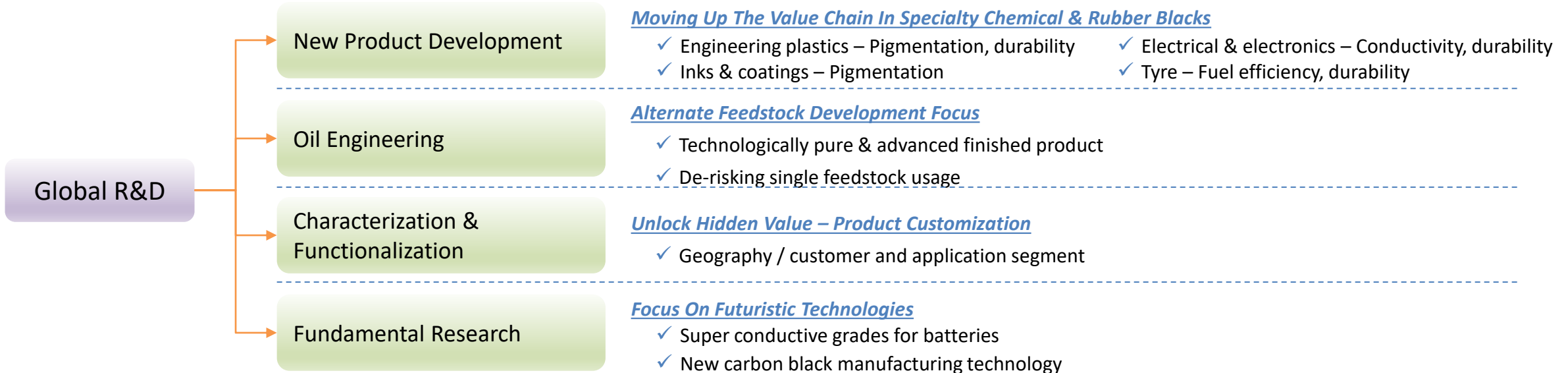
India (2018)



Belgium (2020)

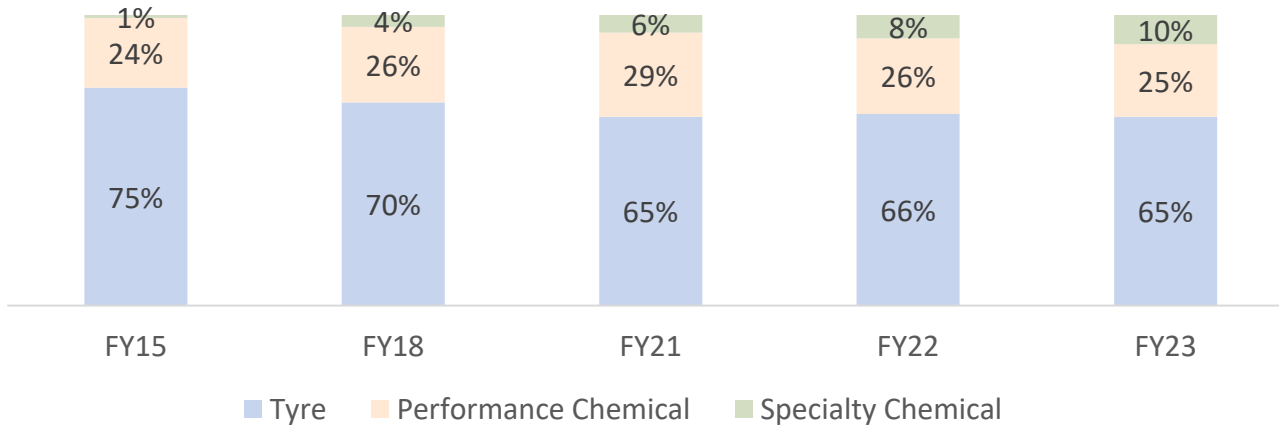
- 50+ scientists & technical professionals in R&D and process technology
- Sushila Goenka R&D Centre at Palej and Innovation Centre in Belgium, Europe
- Focus on improvement of process & machine technology, yield improvement, feedstock efficiency, customization of grades and new product development

## R&D and Process Innovation

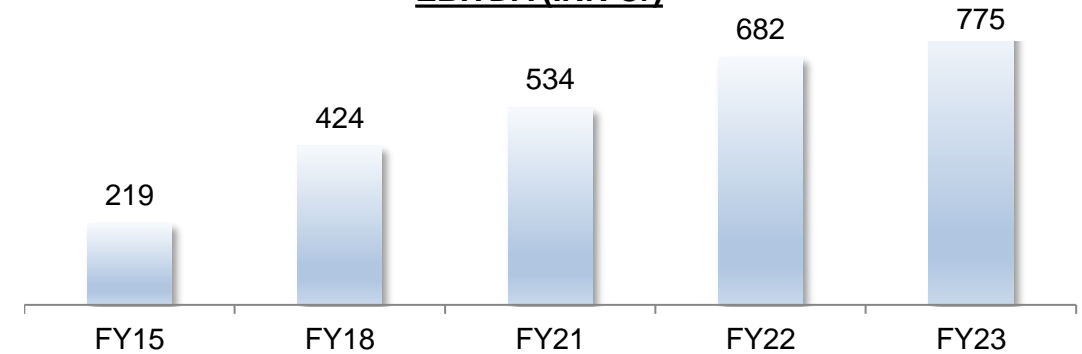


## Increasing Contribution from High Margin Specialty & Performance Chemicals Portfolio

Sales Volume split by segment



EBITDA (INR Cr)



### Specialty Chemicals Business

- ✓ Dedicated lines for the manufacturing of specialty chemicals producing 65+ grades
- ✓ 100+ customers across the world with over 2/3<sup>rd</sup> sales from international markets
- ✓ Specialty chemicals portfolio has wide variety of end-uses such as fibers, pressure pipes, paints, inks, coatings, wire & cables, food contact plastics & engineering plastics
  - Compliant with US FDA requirements for direct / indirect food contact applications
- ✓ Global supply chain with international offices in Korea, China, Belgium, Germany, Vietnam, Japan & USA

### Tyre & Performance Chemicals Business

- ✓ Strategic relationships with global tyre customers
  - Joint product development collaboration with customers
  - Value-added portfolio focus – fuel-efficiency, durability
- ✓ Performance chemicals applications across MRG products, extruded & molded products, agri. films, etc.
- ✓ Efficient supply chain – Virtual Plant concept
  - Flexible capability to serve customers – DDP, CIF, Ex-works
  - Local supply – Warehouse, Decanting Stations
  - Global offices – Korea, China, Belgium, Germany, Vietnam, Japan & USA

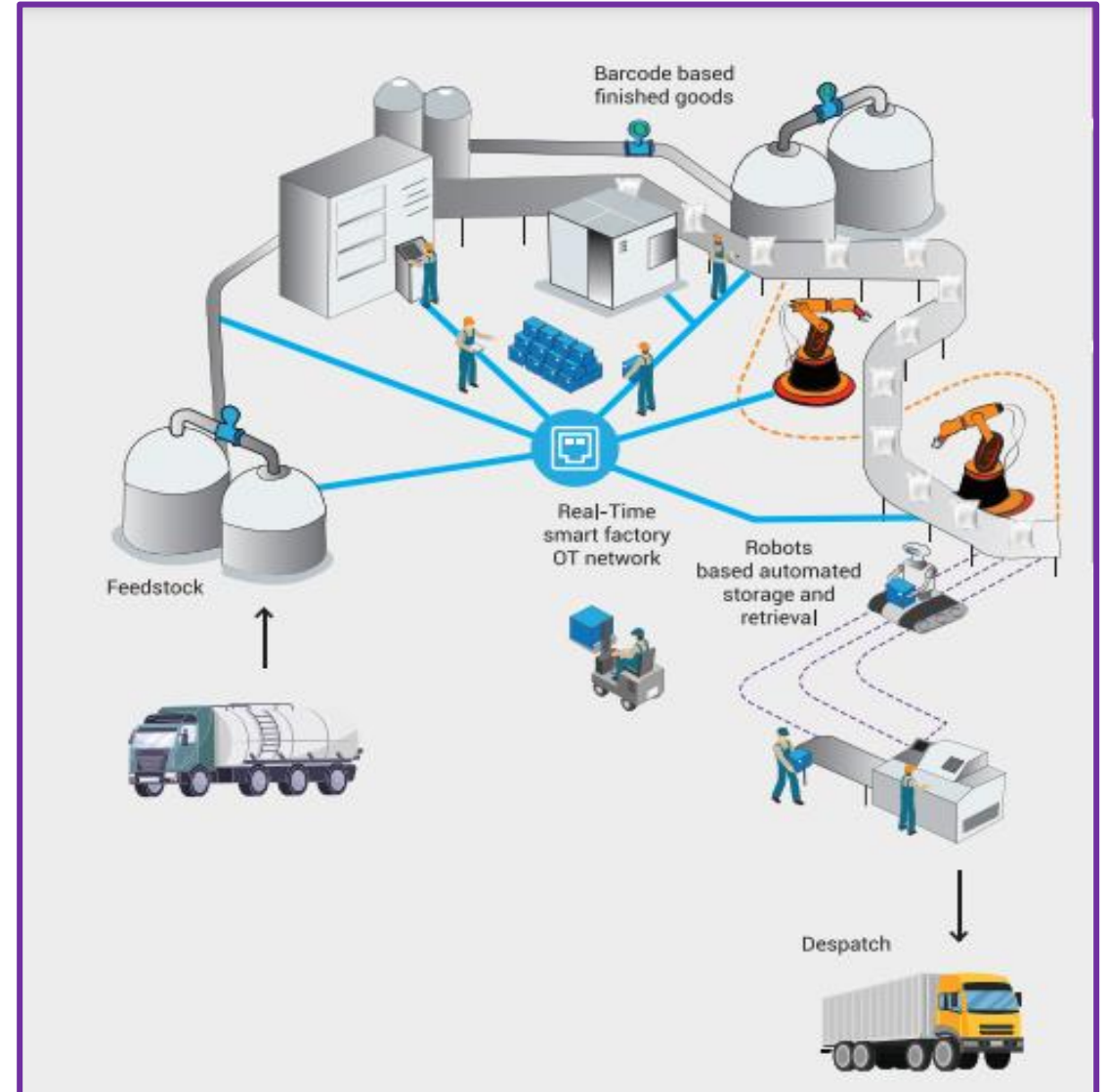
## INDUSTRY 4.0: Smart factory Solutions

Smart Automation in new manufacturing unit in Chennai, Tamil Nadu to generate key analytics and dashboards, eliminate human error and improve safety.

Adoption and deployment of best-in-class Data Security softwares and Advanced threat protection for all end users.

Creating Digital Infrastructure by set up of disaster recovery data centre for critical data protection, Automated tool-based backup is scheduled and monitored for all critical Cloud Servers. Enabling anywhere access with proper security on devices.

Digital transformation of People Processes by implementation of Digital Platforms to improve overall employee experience and make process more efficient and paperless and aligned with our commitment of sustainability.



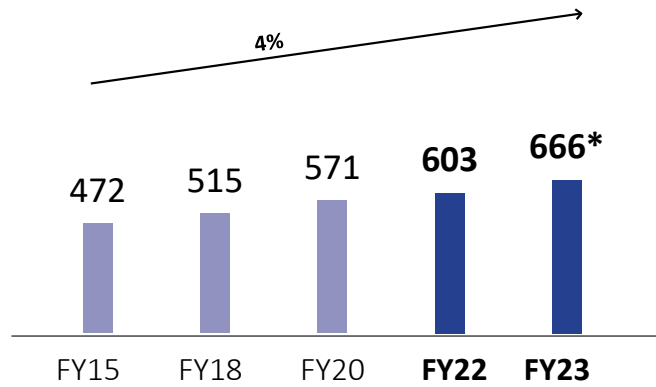
# High ESG Commitment

## ESG Practices & Initiatives

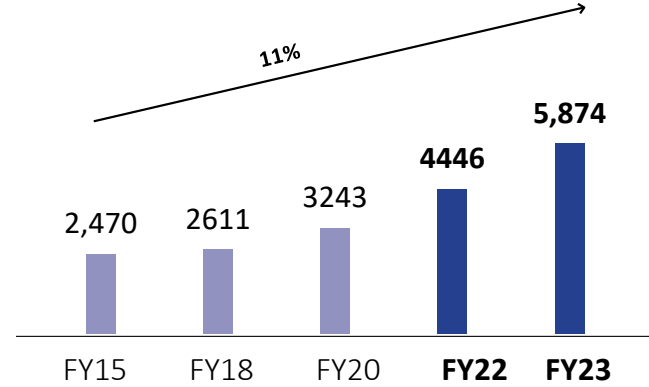
|                 |  |
|-----------------|--|
| <p><b>E</b></p> |  <ul style="list-style-type: none"> <li>✓ <b>Committed to environment sustainability</b> across business operations to ensure that resources are recycled and utilized judiciously</li> <li>✓ <b>Zero Liquid Discharge</b> (“ZLD”) compliant plants</li> <li>✓ <b>Recycling wastewater (847 KLPD recycled water used in FY 22-23)</b> for utilization in the process.</li> <li>✓ <b>Green factory &amp; office buildings</b> and reducing consumption of freshwater</li> </ul> <ul style="list-style-type: none"> <li>✓ Initiatives such as energy management, water management, emission management, effluent management, rain-water harvesting, plantation drives, etc. adopted</li> <li>✓ <b>Green power generation</b> capacity of 98 MW</li> <li>✓ Adheres to international standards such as <b>CDP disclosure, UNFCCC</b></li> </ul>                             |
| <p><b>S</b></p> |  <ul style="list-style-type: none"> <li>✓ Risk-based training programs to improve employee health and safety with <b>target of zero recordable injury report</b> based on TRIR by 2025</li> <li>✓ Proactively working towards the <b>development of underprivileged communities</b> with focus on education, health and sanitation, environment sustainability and holistic community development</li> <li>✓ Adheres to international standards such as <b>Eco-Vadis, European REACH</b></li> <li>✓ Equal opportunity employment, small vendor development, cross cultural appreciation , rewards and recognition programmes in place</li> <li>✓ <b>Donations and financial assistance</b> for various initiatives to help uplift communities across the country</li> <li>✓ <b>Community engagement for</b> CSR activities</li> </ul>                                   |
| <p><b>G</b></p> |  <ul style="list-style-type: none"> <li>✓ <b>More than 60% of the Board of Directors are independent</b> and consist of highly reputed industry veterans and two women directors</li> <li>✓ Continued focus on designing and improving the flow of activities to ensures <b>economic prosperity and long-term value creation for all stakeholders</b> over the foreseeable future</li> <li>✓ <b>Anti-bribery</b> policy, <b>quality</b> policy and <b>sustainability</b> policies in place</li> <li>✓ <b>Board is diverse in terms of skills and expertise</b> in the fields of global business, strategy &amp; planning, leadership, legal &amp; regulatory matters, finance, risk management and relevant technologies</li> <li>✓ Measures such as whistleblower policy, vigil mechanism, POSH policy and prohibition of insider trading policy in place</li> </ul> |

# Financial performance

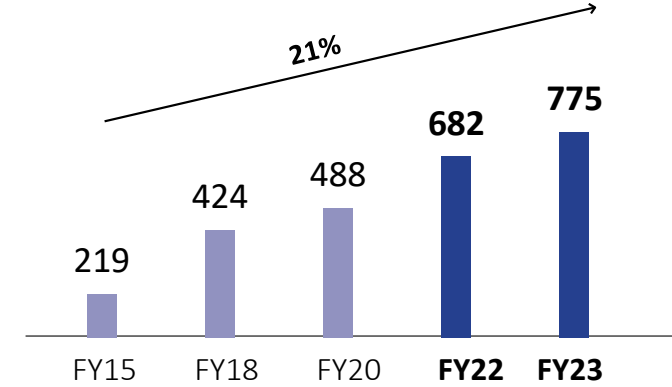
Capacity (in KTPA)



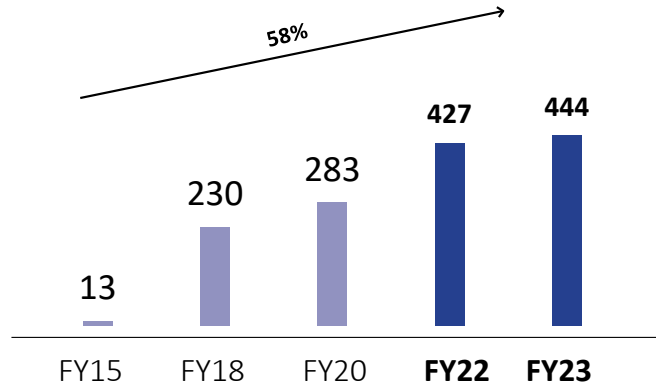
Revenue (in Cr)



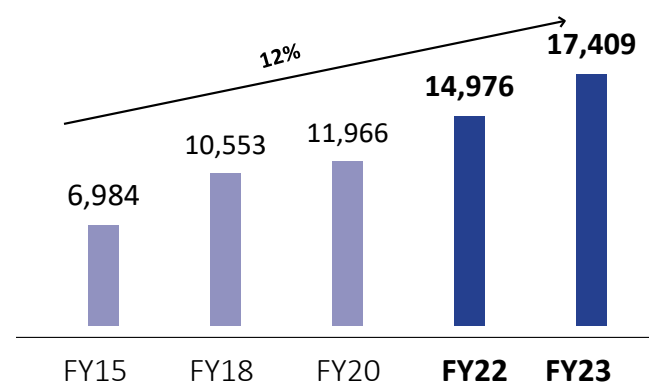
EBITDA (in Cr)



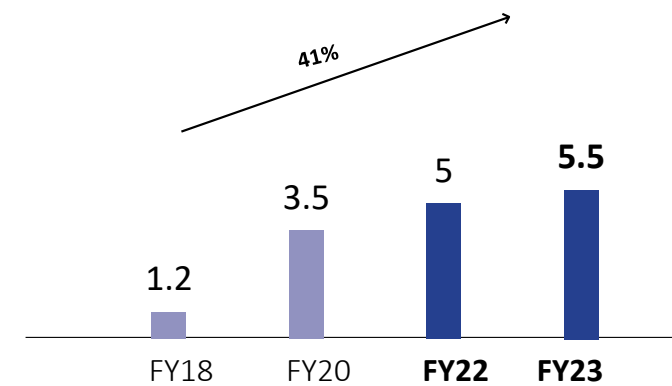
PAT (in Cr)



EBITDA/MT (in Cr)



Dividend/Share (in Rs)



\* Includes 1<sup>st</sup> phase 63KT of Greenfield Tamil Nadu

**Thank You**

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