



JSW Infrastructure

Investor Presentation



May 2026

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Agenda

JSW Infrastructure- An Overview

Indian Economy & Strong
Fundamentals of Port & Logistics
Sector

Growth Strategy & Guidance

Key Project Updates

FY26 Operational & Financial
Performance

Robust Financials and Strong
Balance Sheet

Sustainability & CSR

To Conclude

Appendix



An Overview





**Amongst India's leading
Conglomerates with a
turnover of US\$23 Bn¹**



Steel

- India's largest steel producer with capacity of 35.7 MTPA
- Growing to 51.5² MTPA by FY31
- Market Cap: ~US\$33 Bn



Infrastructure

- India's 2nd largest Private Ports Operator & Fast growing Logistics Platform
- 183 MTPA ports capacity, growing to 400 MTPA by 2030
- Market cap of ~US\$6 Bn



Paints

- Capacity of 239,000 KLPA, with plants across Karnataka and Maharashtra
- Completed transformative acquisition of Akzo Nobel India, with a shareholding of 61.2%
- Targeting 800,000 KLPA capacity by FY30
- Market Cap: ~US\$1.5 Bn



Ventures

- Early-stage institutional venture capital fund investing in technology companies across Platform and SaaS businesses at pre-series A to series A stages



Energy

- Power producer with 13.3 GW installed generation capacity
- Targeting 30GW generation + 40GWh of energy storage capacity by FY30
- Market Cap: ~US\$11 Bn



Cement

- Capacity of 24.1 mtpa, growing to ~43.5 mtpa and developing a pan-India presence
- Lowest CO2 emission intensity in cement industry
- Equity listing in Aug 2025, current market cap of ~US\$2 Bn



EV

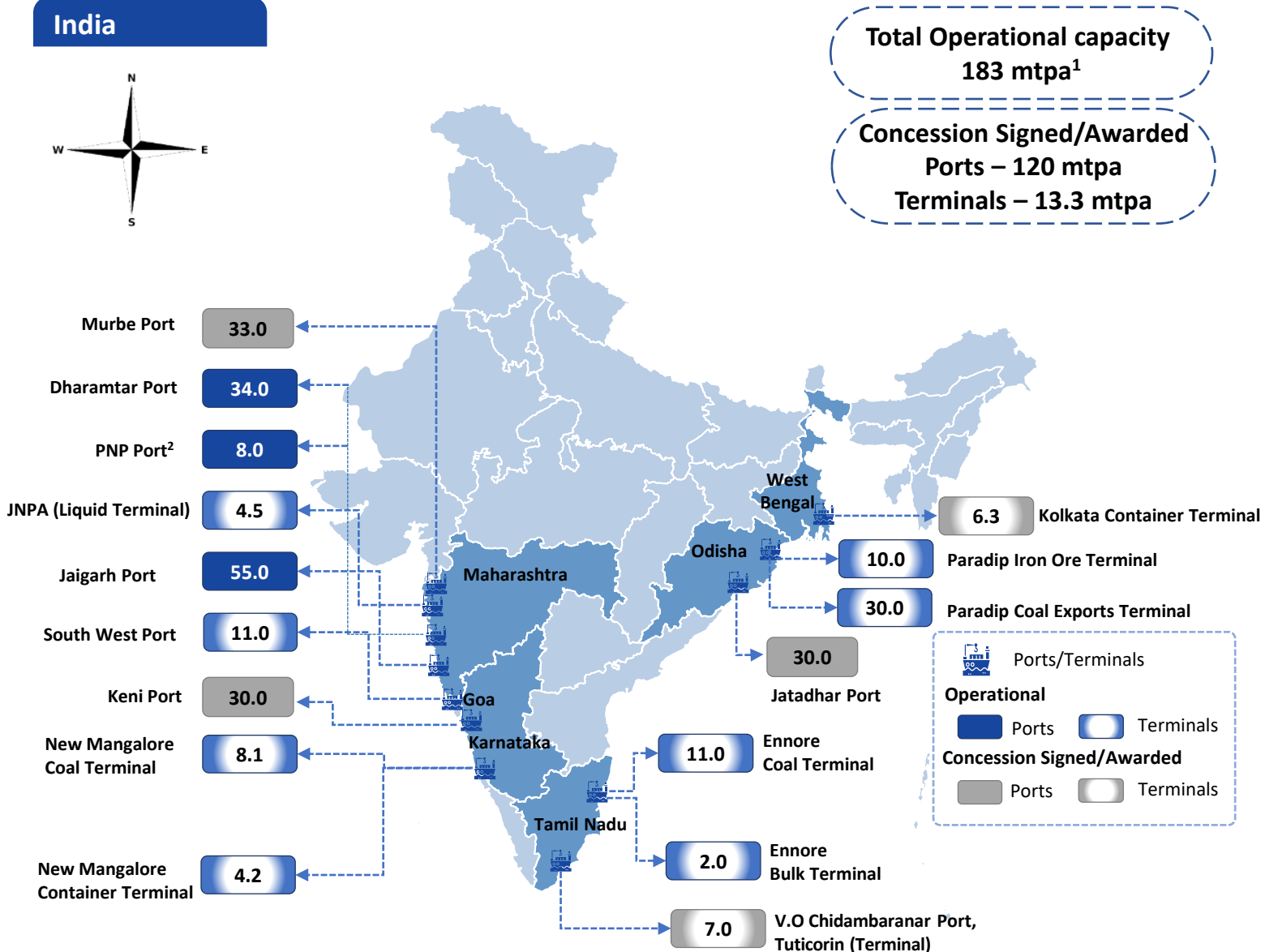
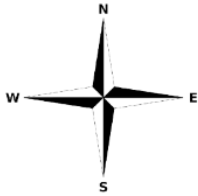
- 35% stake in JSW MG Motors India, 2nd Largest EV passenger vehicle seller in India
- Plan to build India's largest NEV (new engine vehicle) complex
- Targeting 360k of PV and 100k of CV capacity by 2030



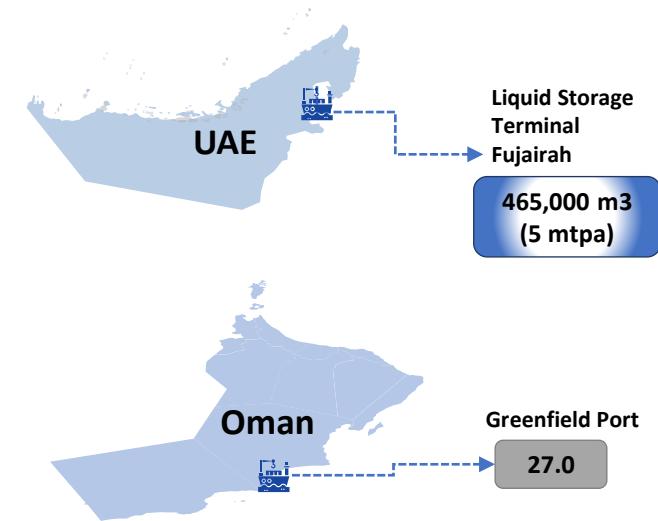
Sports

- High Performance Training centre at Vijayanagar and 4 satellite centres – trained Olympic medal winners
- Teams Owned: Delhi Capitals, Pretoria Capitals, Bengaluru FC and Haryana Steelers

India



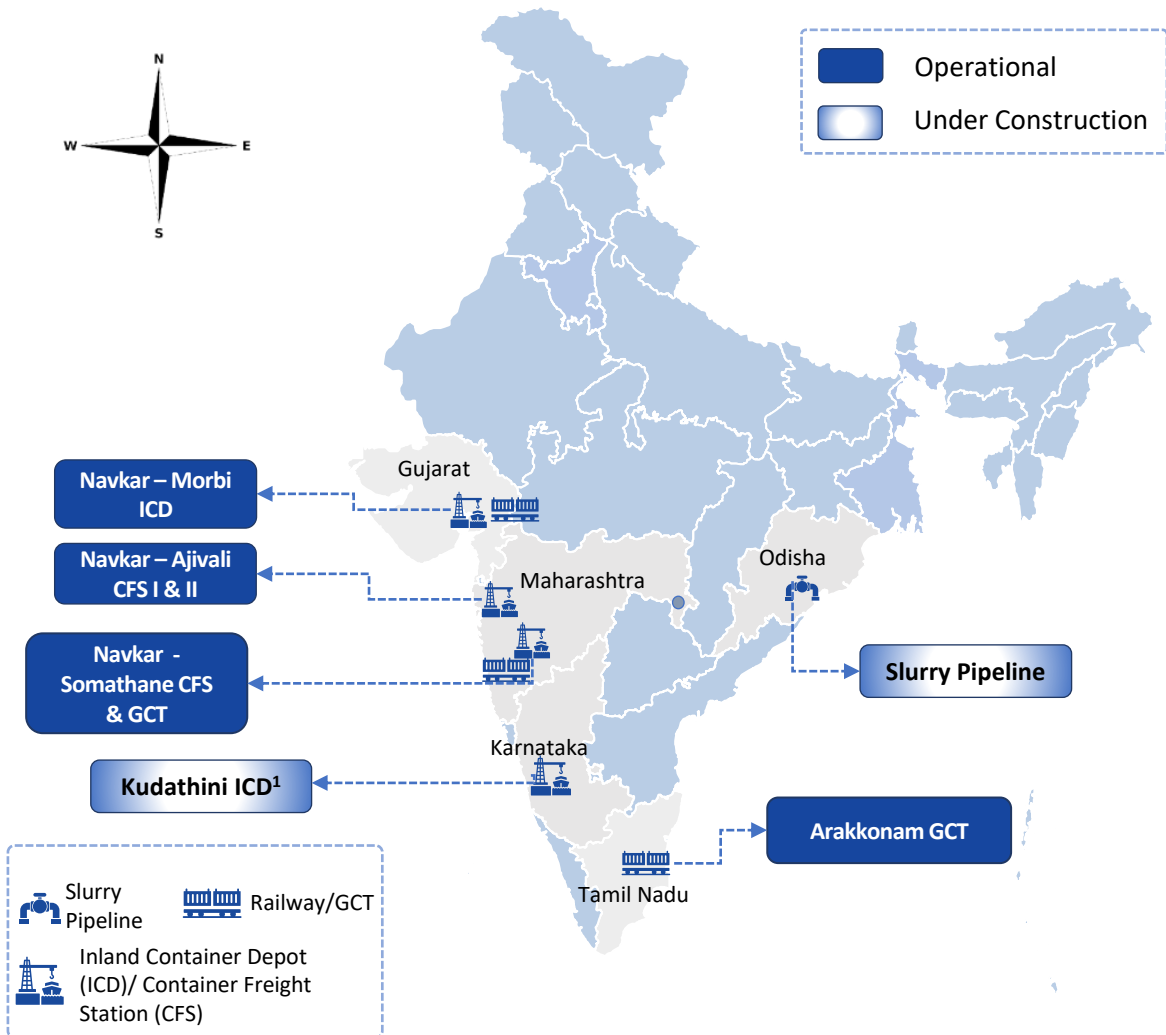
International



- O&M contracts at two dry bulk terminals in Fujairah (24 mtpa) and Dibba (17 mtpa) in UAE
- Strategic presence on West and East coasts of India
- Locational advantage enhances sticky cargo profile that leads to lower transportation costs
- Diversified presence ensures good connectivity to industrial hinterlands and mineral rich belts

Note: 1. Excluding O&M operations outside India (Fujairah and Dibba Terminal) 2. The company owns a majority stake in PNP port
Please note the map is not to scale

Our footprints in Logistics & Port Connectivity



Key Equipments



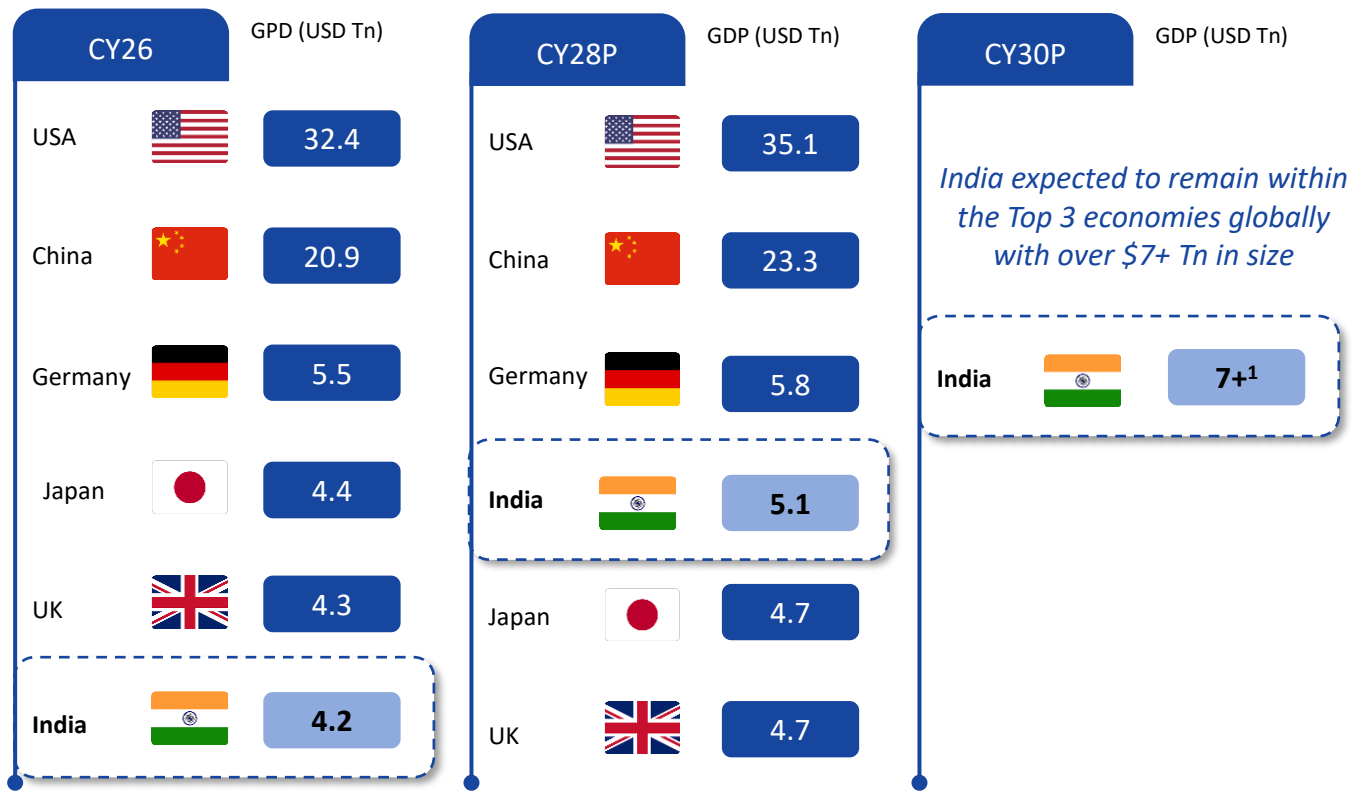
Land Bank (Acres)

Particulars	Developed	Undeveloped	Total
Panvel Maharashtra	84	59	143
Morbi, Gujarat	99	41	140
Total	183	100	283

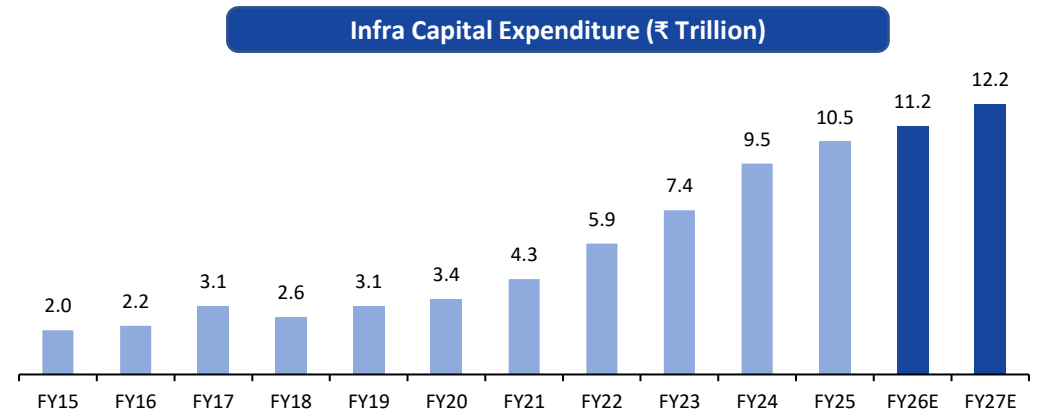
India's Growth Story and Strong Fundamentals of Port & Logistics Sector



India on Track to be 3rd Largest Economy with a Size Of \$7+ Tn



Government's Thrust on Infra Capex



Flagship Govt. programs to drive large scale infra improvements

- National Infrastructure Pipeline**
 Covered 14,000+ projects with a capex of \$2+ trillion
- Bharatmala**
 65,000 kms+ of highways/roads connecting 550 districts
- Sagarmala**
 \$100 Bn+ planned for port modernization
- UDAN**
 120 new airports planned
- PM Gatishakti**
 Various Multi-model connectivity projects being evaluated

Source: GDP CY26- 28 from IMF's World Economic Outlook database: Apr 2026.
 Source: Infra Capital Expenditure from CAG, MoF; FY26 BE, estimates as per the budget.
 1: As per forecasts from S&P Global Market Intelligence and Indian Government Estimates ([Press Release](#))

Strong Fundamentals of Port & Logistics Sector

Ports



11,099 km of coastline and 20,275 km of national waterways. Maritime routes contribute 95% of India's trade volume



Maritime India Vision (MIV) 2030 has identified key interventions across 4 areas to Develop best-in-class Port infrastructure:

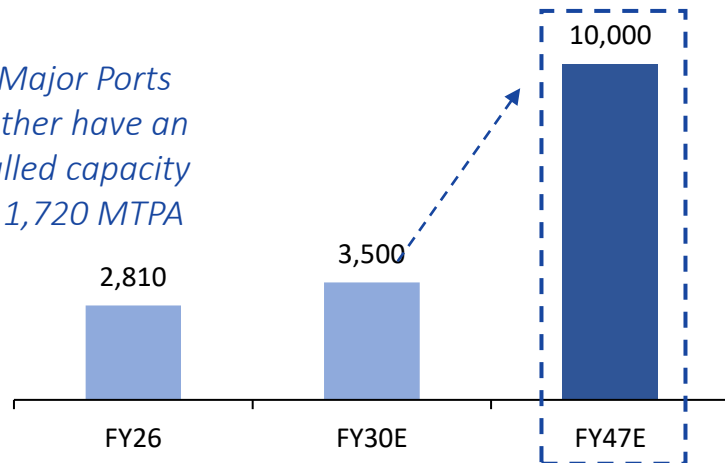
Brownfield capacity augmentation, Developing world-class Mega Ports, Development of a transshipment hub in Southern India and Infrastructure modernization



Adoption of the Landlord Model: Huge Opportunity for the Pan India Private Terminal Operators

Port capacity to Quadruple to 10,000 mtpa by 2047

12 Major Ports together have an installed capacity of ~ 1,720 MTPA



Logistics



Government envision to build an integrated, cost-efficient logistics ecosystem which is globally competitive.



Key initiatives undertaken by the Government:

Road : Bharatmala, FASTag, Multi-modal logistics parks, etc

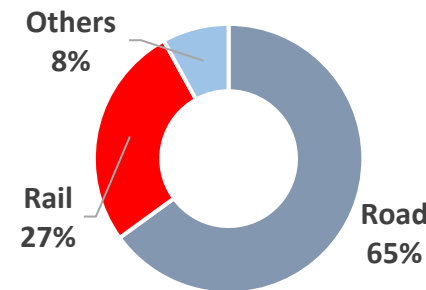
Waterways : Sagarmala, Jal Marg Vikas, etc

Rail : Dedicated Freight Corridor, Gati Shakti Cargo Terminal, General Purpose Wagon Investment Scheme, Liberalise Special Freight Train Operator, etc



Rail Advantage : Lowest cost (₹1.96/tonne/km), Freight volume in FY25 – 1.6 billion tonnes. Targeting 45% share by 2030.

Freight Movement in India



Logistics Cost / km in India

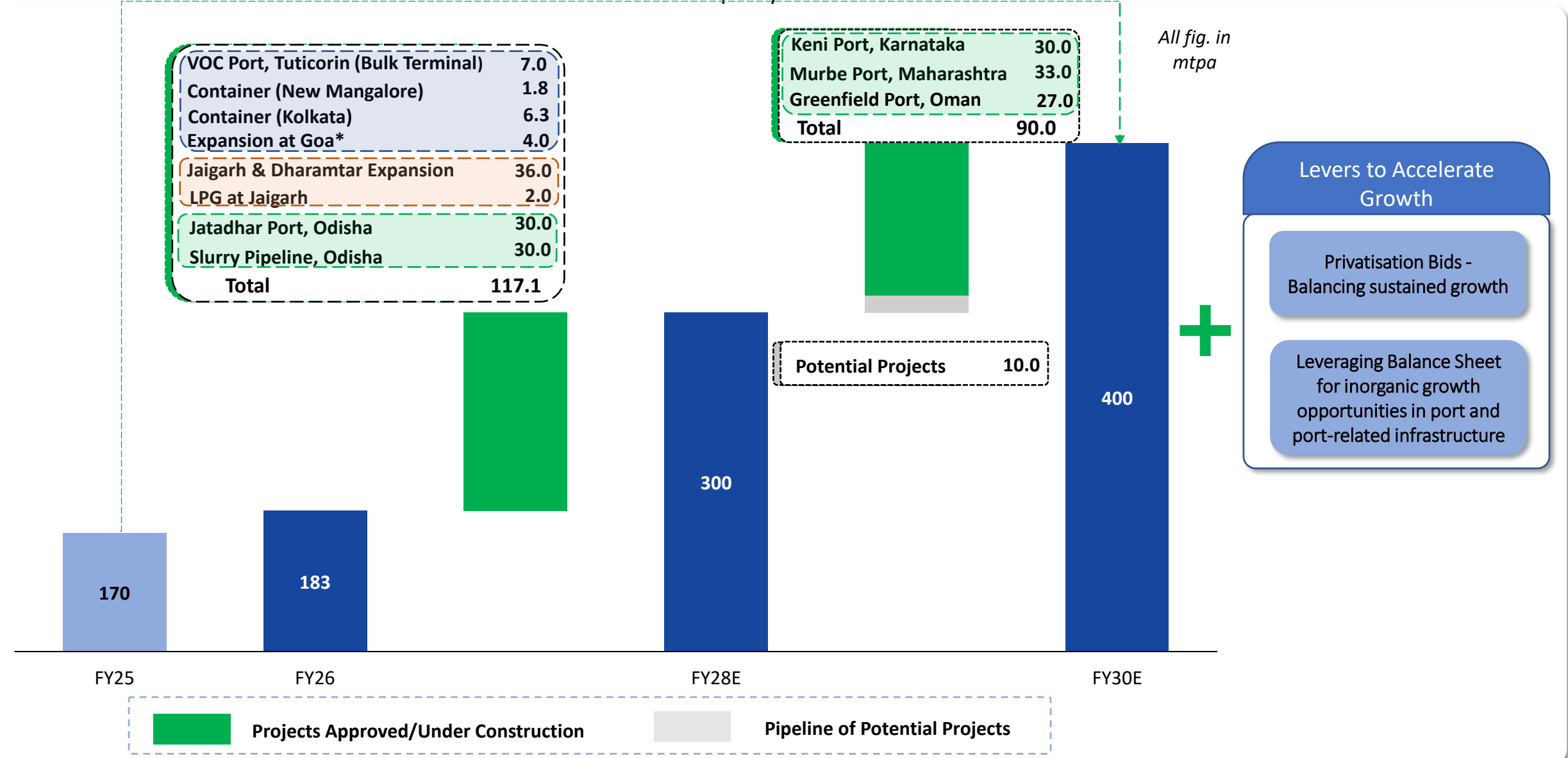


Growth Strategy & Guidance



2030 Road Map for Growth and Value Creation for Port Segment

~2.4x increase in overall capacity



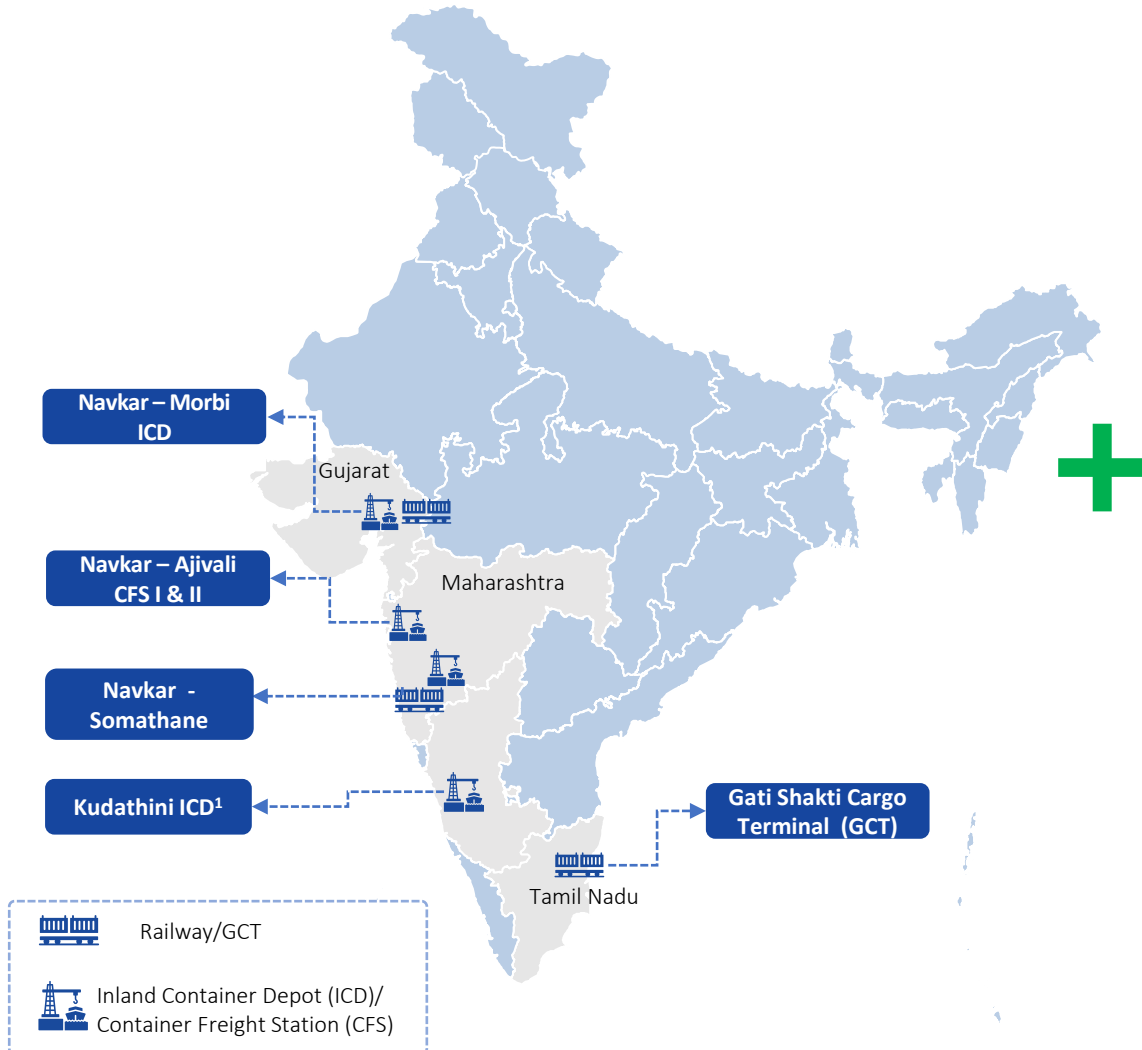
Levers to Accelerate Growth

- Privatisation Bids - Balancing sustained growth
- Leveraging Balance Sheet for inorganic growth opportunities in port and port-related infrastructure

* Further approval of 4 MTPA is under process.

2030 Road Map for Logistics segment

Foray into Logistics through Navkar and GCT



Growth Strategy

1. Greenfield ICDs & MMLPs

- Leverage JSW Group's diverse business locations (Steel, Cement, Paints, etc.) to set up railway sidings and infrastructure for storage, bagging/stuffing and other value-added services
- Expanding into ICDs and Multi-Modal Logistics Parks (MMLPs)

2. Gati Shakti Multi-Modal Cargo Terminal (GCT) – Asset light model as land is provided by the Railways

Participate in the upcoming GCT bids, following the successful bid for GCT at Arakkonam, Chennai.

3. Inorganic Opportunities

Acquiring CFS and ICD businesses, akin to the acquisition of Navkar Corp.

4. Partnerships/Associations

Partner/ Collaborate with operators and third-party customers to drive business growth and expansion.

5. Investment into Rail & Container Rakes

- Targeting fleet of 250 rakes
- Acquired 25 rail rakes with plans to increase the fleet to 110 rakes on the back of GPWIS and LSFTO initiatives by Government
- Increasing to 140 container rakes in the medium term

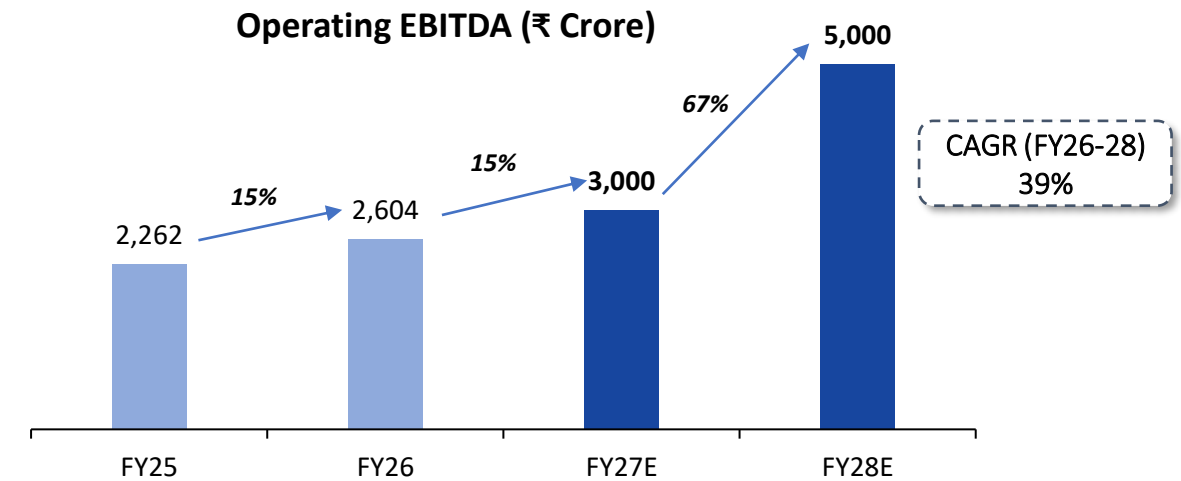
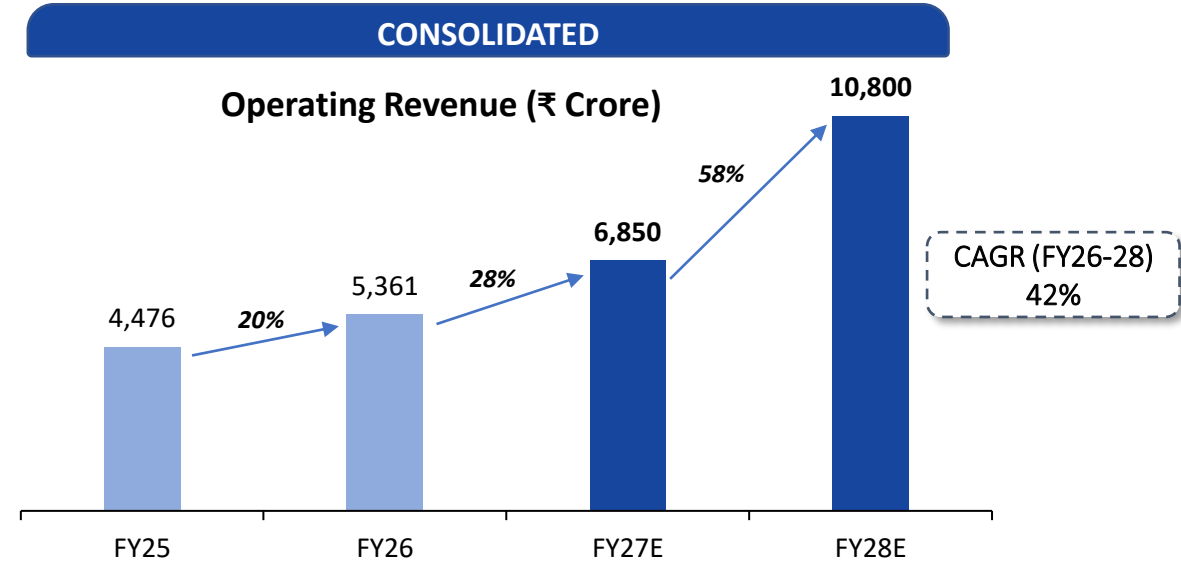
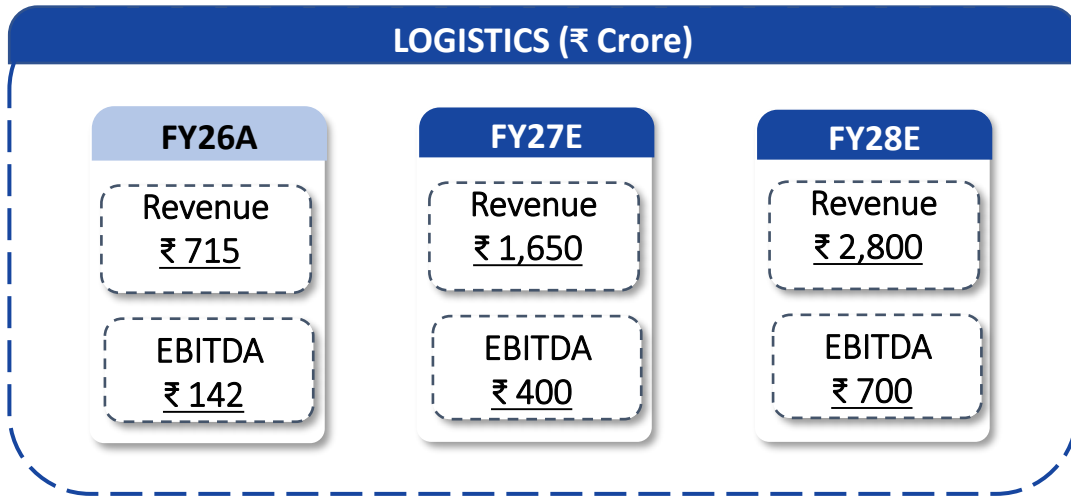
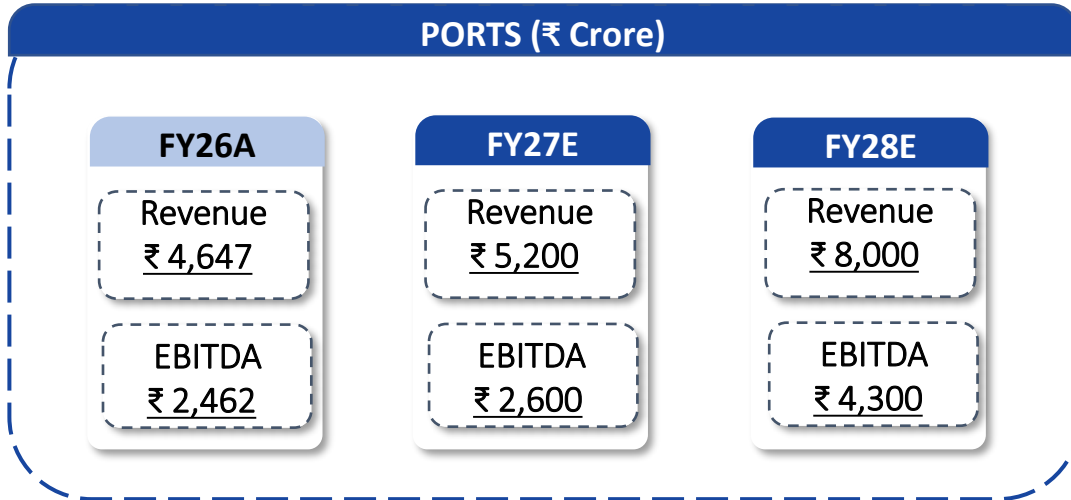
FY30 Targets

Revenue (Crore)
₹ 8,000

EBITDA (Crore)
₹ 2,000

CAPEX (FY25-30)
₹ 9,000 Crore

Note: 1) Commercial operations underway at Private Freight Terminal in Kudathini
Please note the map is not to scale



Key Project Updates



Terminals

V.O. Chidambarana Port, Tuticorin

- Concession agreement signed in July 2024
- Construction of 7mtpa berth to handle dry bulk cargo, estimated Capex of ₹600 Crore
- Foundation and Piling 100% completed and Civil work pertaining to Conveyor is 90% completed
- Cargo handled through interim operations: 1.46MT in Q4 FY26 and 4.43MT in FY26
- Expected completion by H2 CY26

Expansion at Mangalore Container

- Capacity Expansion from 4.2 to 6mtpa, Estimated Capex – ₹150 Crore
- Yard development work underway
- Empty Handler delivered and commissioned and Reach Stackers delivery is expected in Q1 FY27
- Expected completion by Q2 FY27

Kolkata Container Terminal

- Concession agreement signed in September 2025
- Capacity of 0.45 million TEUs (6.3mtpa), Estimated Capex – ₹740 Crore
- Mobile Harbour Cranes (MHC) mobilized and Custom clearance received
- Interim operations are expected to commence shortly
- Expected completion in H1 FY28



Works under progress at Tuticorin site



Works under progress at Mangalore site

Brownfield Expansion

LPG at Jaigarh

- Capacity – 2mtpa
- Estimated Capex – ₹900 Crore
- Petroleum and Explosive Safety Organisation (PESO) approval for LPG Terminal, Pipelines and Jetty received
- Detailed Engineering work under progress
- Targeting completion during FY2027

Expansion at Dharamtar & Jaigarh

- Capacity Expansion – 36mtpa at Dharamtar (21mtpa) and Jaigarh (15 mtpa), on the back of expansion of 5mtpa Steel-making capacity of Anchor customer at Dolvi
- Estimated Capex – ₹2,359 Crore
- Targeting completion by March 2027

Jaigarh

- Civil work relating to Berths completed
- Dredging work 60% completed

Dharamtar

- Berth Construction 48% completed
- Substation building work 49% completed
- Prefabricated Structure for Substation 40% received at site and 30% erected



Berth and Pump house at Jaigarh



Expansion work at Jaigarh Port

Greenfield Port

Jatadhar Port

- Concession agreement signed in June 2025 by the Anchor Customer
- Capacity – 30mtpa
- Estimated Capex – ₹3,050 Crore
- Pile foundation work 80% completed
- 7 million cubic meter (CBM) dredging completed
- Construction to be completed by March 2027

Keni Port

- All weather 30mtpa greenfield multi-cargo, direct berthing, deep water commercial port
- Concession agreement signed with Karnataka Maritime Board in Nov 2023
- Estimated Capex – ₹4,119 Crore
- Environment Internal Assessment (EIA) report finalized, awaited for Coastal Regulation Zone (CRZ) recommendations.
- Commercial operations are expected to commence in FY 2029

Port connectivity projects

Slurry Pipeline Project (30 mtpa)

- 302KM Slurry pipeline in Odisha - Nuagaon to Jagatsinghpur
- 247km of welding (82%) and 235km of lowering (78%) completed
- Long term Take or Pay Agreement with JSW Steel in place
- Estimated Capex - ₹4,000 Crore
- Construction to be completed by March 2027



Works under progress at Jatadhar site



Setting up slurry pipeline



Q4 & FY2026 Results update

Operational & Financial Performance





- Total Cargo Handled at **122 MT (+4% YoY)**, Third-party cargo volume stood at **48%**
- Navkar Corp - Domestic cargo up **40% YoY** and EXIM up **21% YoY**
- Consolidated revenue from operations stood at **₹5,361 Crore (+20%)**, Operating EBITDA at **₹2,604 Crore (+15% YoY)**



- Gross Debt of **₹6,410 Crore** and Cash and Bank balance of **₹3,309 Crore** (as of 31st Mar 2026)
- Net debt to Operating EBITDA of **1.2x**, Strong balance sheet with Investment-Grade ratings from Fitch and S&P; well positioned to pursue value-accretive organic and inorganic growth.



- Board recommended dividend of **₹0.90/share**, representing **45%** of the Face Value (40% in FY25)



- Public hearings successfully concluded for the proposed greenfield ports at Keni (Karnataka) and Murbe (Maharashtra).
- The Slurry pipeline project is ~80% complete, while construction activities at Jatadhar Port and capacity addition works at Jaigarh and Dharamtar ports are progressing well.



- Kolkata Container Terminal Project (6.3mtpa) Awarded and Concession Agreement Signed; permission to commence interim operations received
- JNPA Liquid Terminal (4.5mtpa) project completed, enabling transition from interim to full-fledged commercial operations



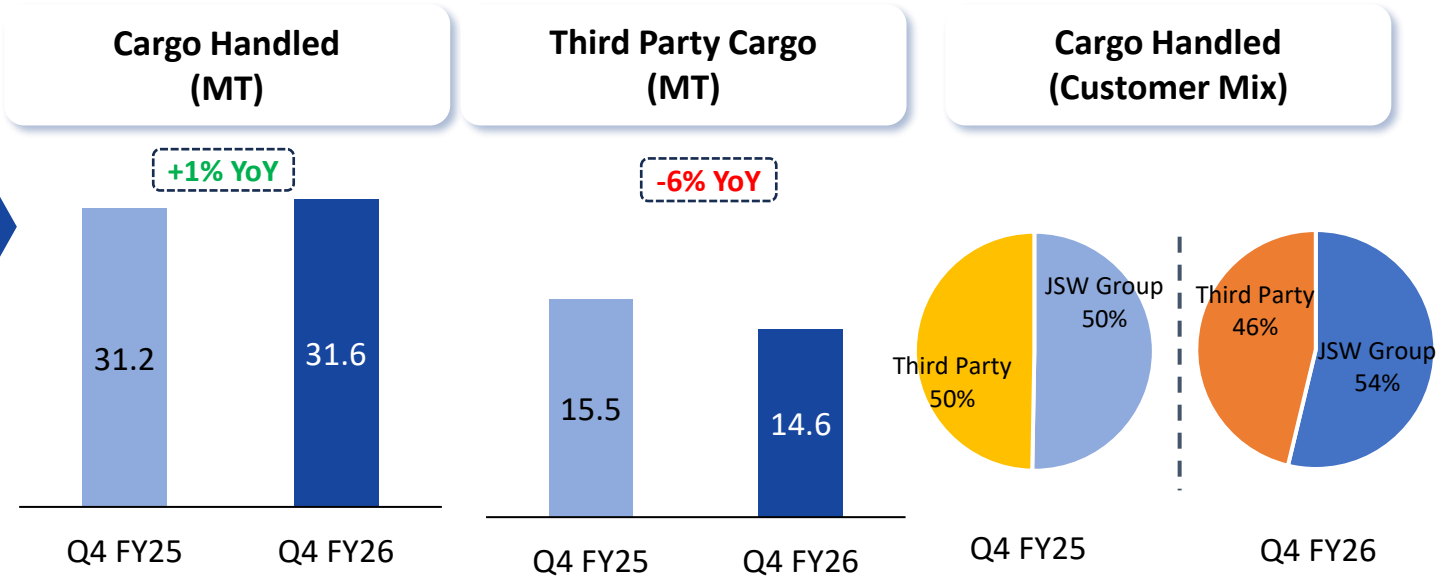
- Acquisition of 25 rakes marks a significant step in scaling the logistics segment, further order placed for 40 rakes
- Acquired brownfield rail siding in Kudathini, Karnataka
- Commenced operations at Gati Shakti Terminal at Arakkonam, Chennai



- Rated as “Low Risk” by Sustainalytics for Environmental, Social, and Governance (ESG) and CDP Rating at Management Level “A-”

Q4 & FY2026: Operational Performance - Ports

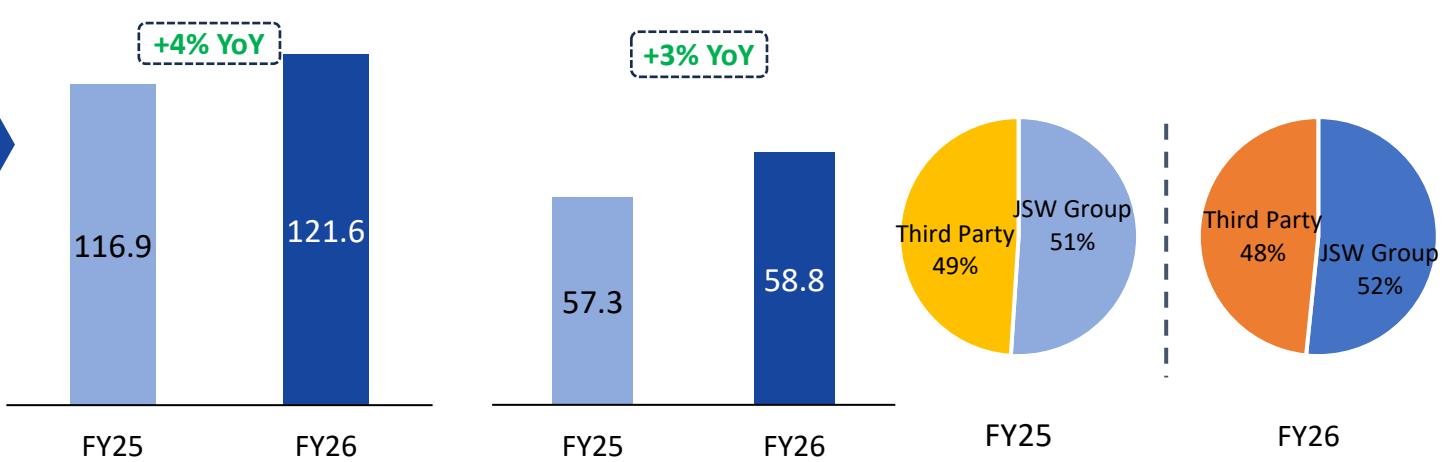
Q4



Key Drivers – Q4 FY26

- 31.6 MT cargo handled in Q4 FY26, reflecting a flat growth
- Strong performance at South West Port, Dharamtar Port and Jaigarh Port on the back of higher volumes of Anchor customer.
- Interim operations at Tuticorin and JNPA¹ has contributed positively
- Growth was offset due to ongoing Middle East conflict:
 - Lower volumes at the Fujairah facility
 - Cargo deferments at Indian operations driven by lower availability of vessels and higher freight cost. However, the situation improved from April 2026

12M



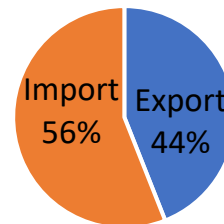
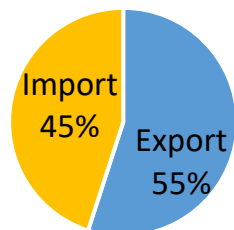
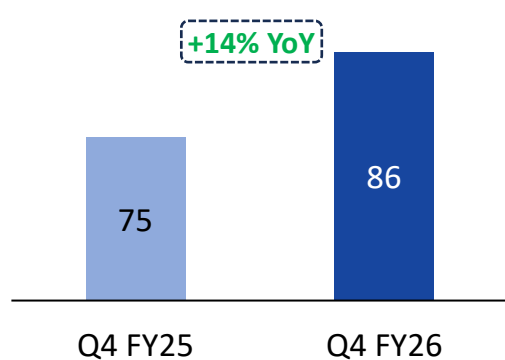
Key Drivers – FY26

- 122 MT cargo handled in FY26, reflecting a 4% YoY growth
- Strong performance at South West Port, Dharamtar Port and Jaigarh Port
- Interim operations at Tuticorin and JNPA¹ has contributed positively
- Overall growth impacted by subdued volumes at Paradip Iron Ore Terminal (down 4.2 MT YoY) and lately by the Middle East conflicts impact at Fujairah Terminal

Q4

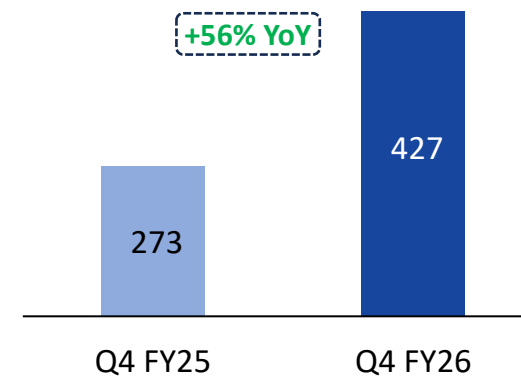
EXIM Volume

ICD + CFS
Volume handled
(‘000 TEUs)



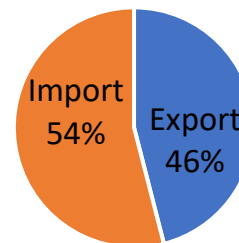
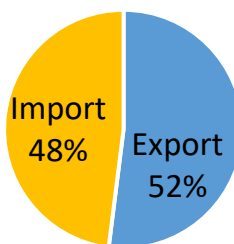
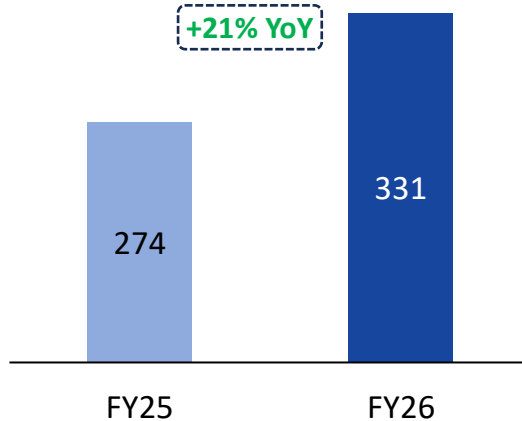
Domestic Volume

Volume handled
(‘000 Metric Tonnes)

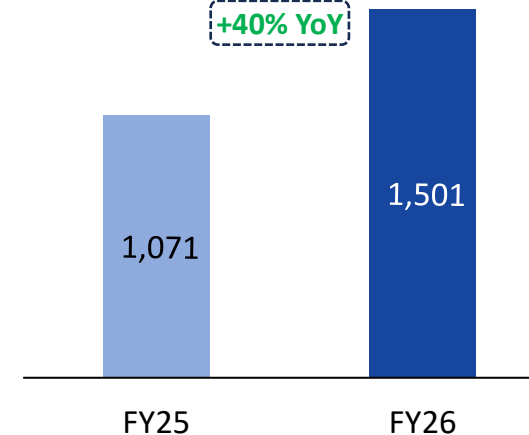


12M

+21% YoY



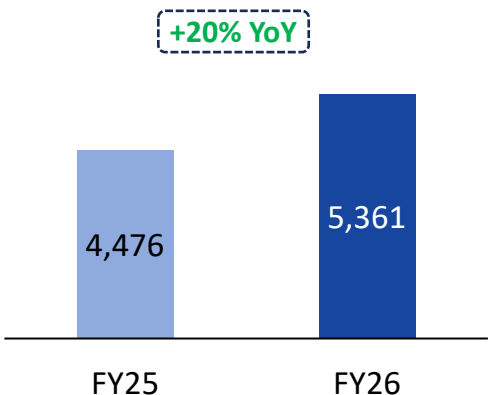
+40% YoY



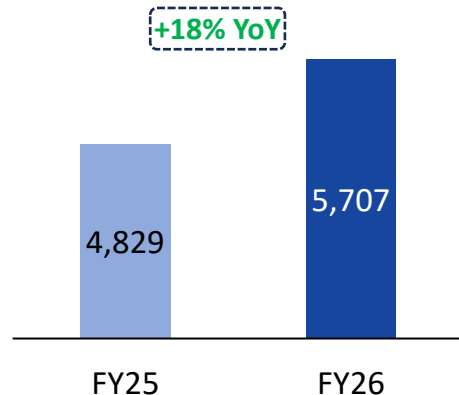
Note: ICD - Morbi, CFS - Somathane and Ajivali I & II and PFT/Rail - Morbi, Somathane and Udhana
*TEUs – Twenty-foot Equivalent Units

FY26 – Consolidated Financials & Key Performance Indicators

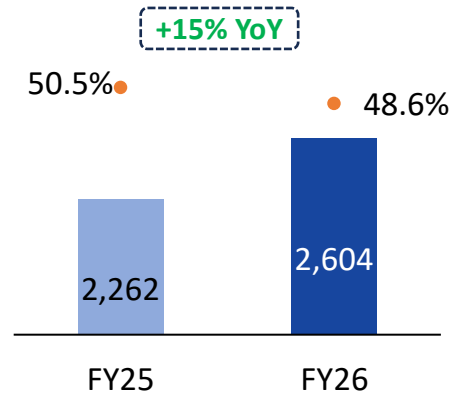
**Revenue from operations
(₹ Crore)**



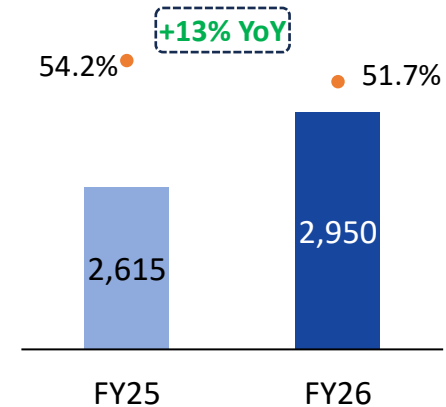
**Total Revenue
(₹ Crore)**



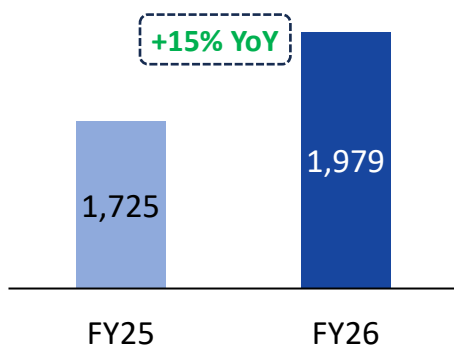
**Operating EBITDA (₹ Crore)
& Margin (%)**



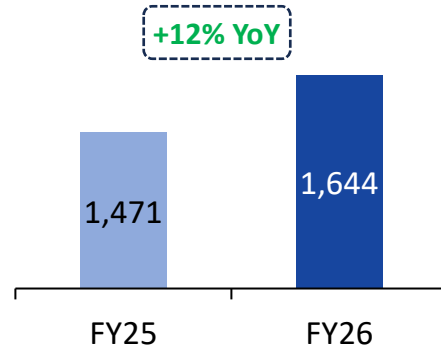
**EBITDA (₹ Crore)
& Margin (%)**



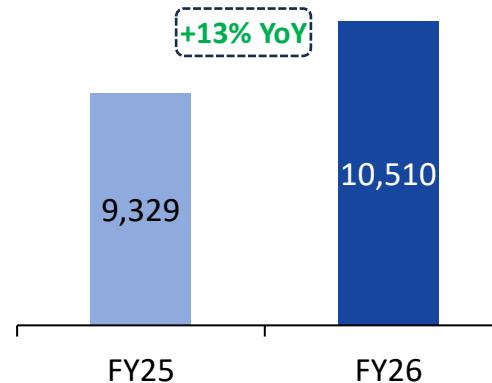
**Adjusted PBT¹
(₹ Crore)**



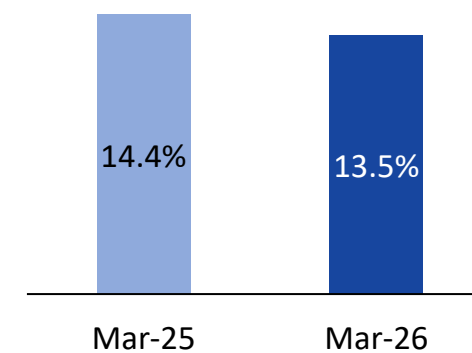
**Adjusted PAT²
(₹ Crore)**



**Net Worth³
(₹ Crore)**

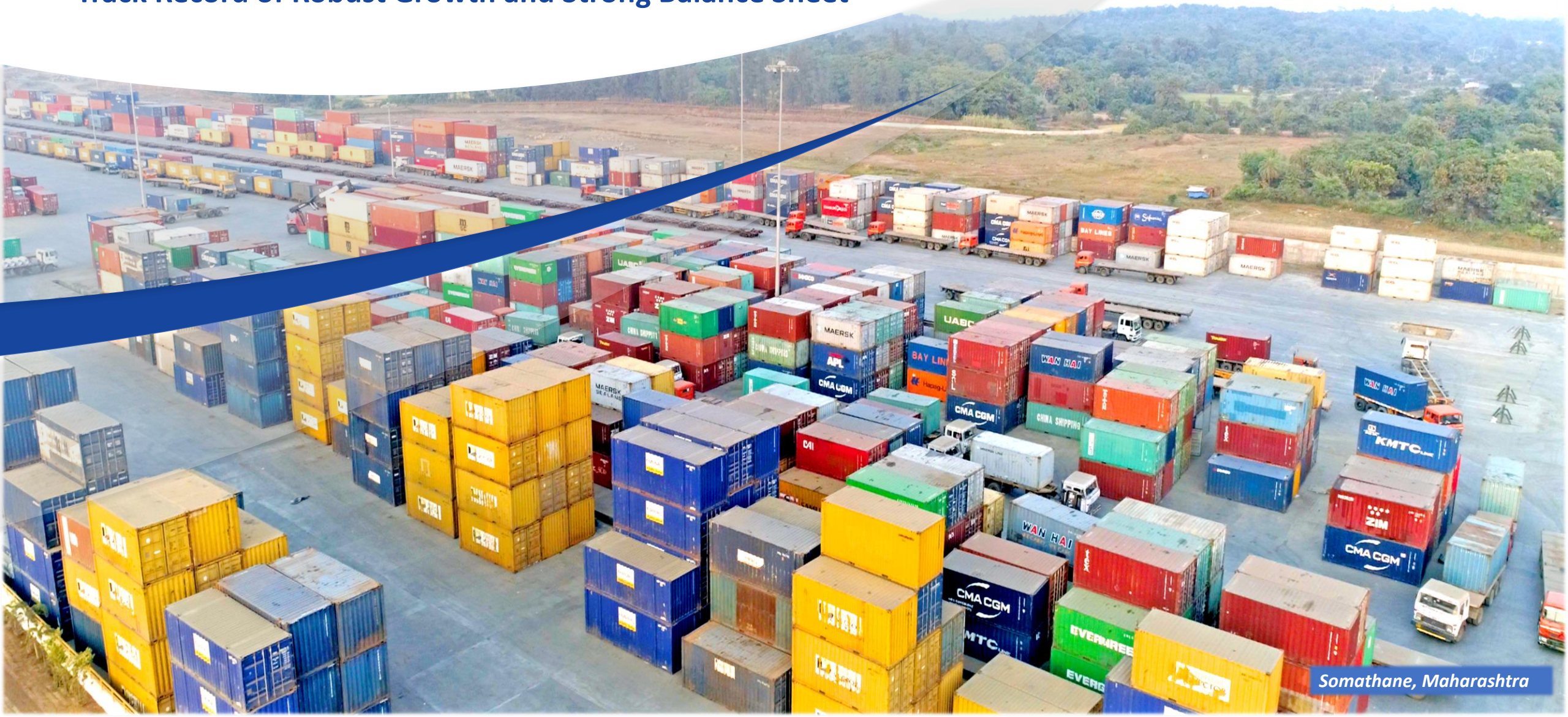


RoCE (%)

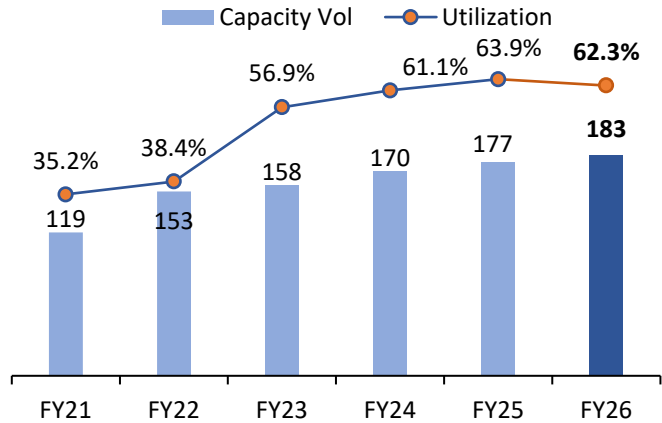


Note: 1) Before considering an exceptional item of ₹68 crore loss arising from the fire incident at the Fujairah Liquid Terminal, ₹12 crore towards employee costs pursuant to the implementation of new Labour Code and unrealized forex loss of ₹26 crore. Reported PBT for FY26 is ₹1,873 crore vs ₹1,803 crore in FY25. 2) Reported PAT for FY26 is ₹1,547 crore vs ₹1,521 crore in FY25. 3) Networth excluding Non-Controlling Interest (NCI) and Capital Reserve.

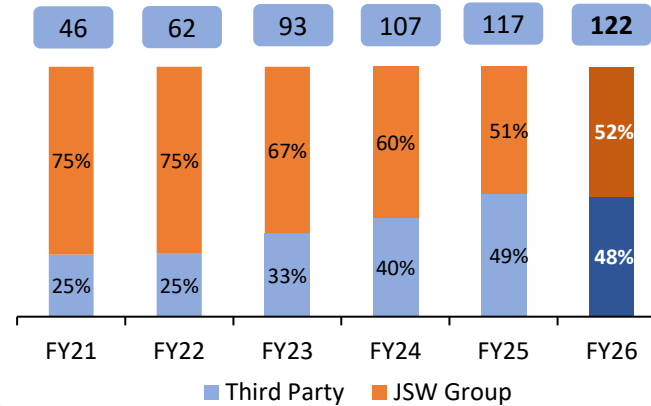
Track Record of Robust Growth and Strong Balance Sheet



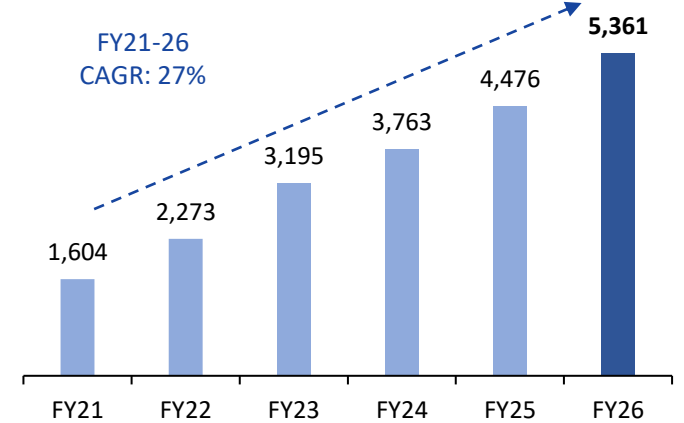
Capacity (mtpa) & Utilization (%)



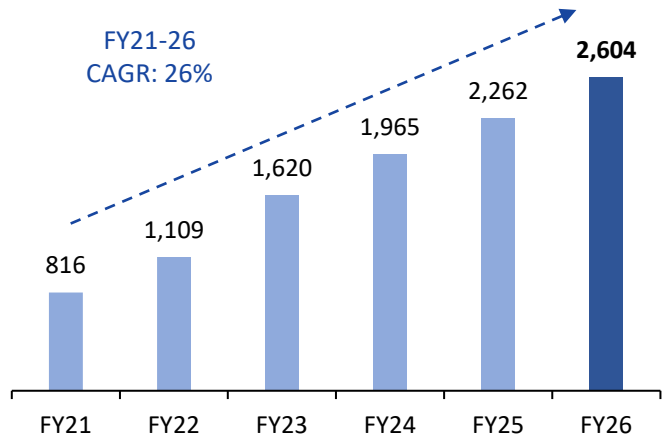
Cargo Handled (MT)



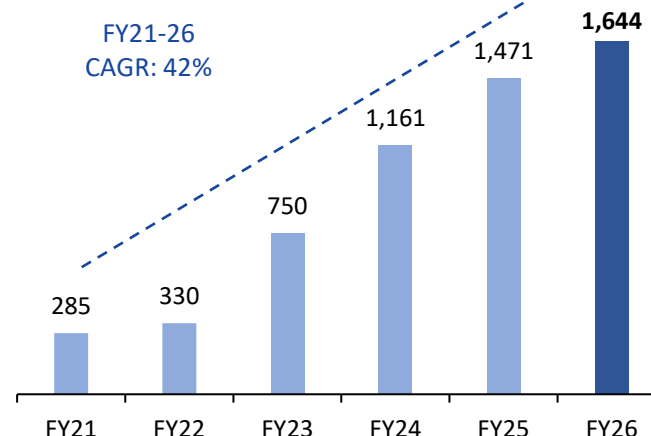
Revenue from Operations (₹ Cr)



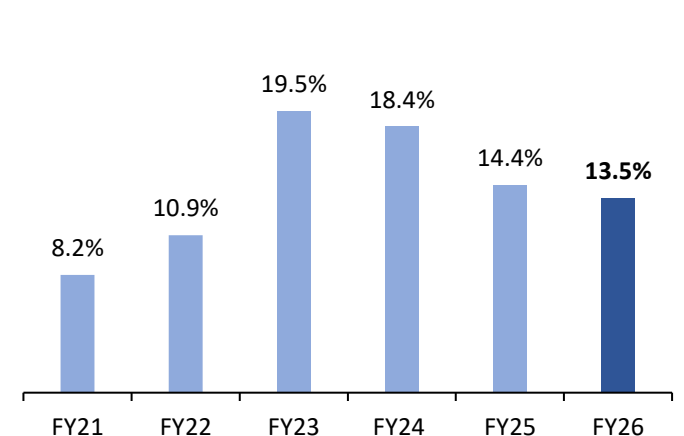
Operating EBITDA (₹ Cr)



PAT¹ (₹ Cr)



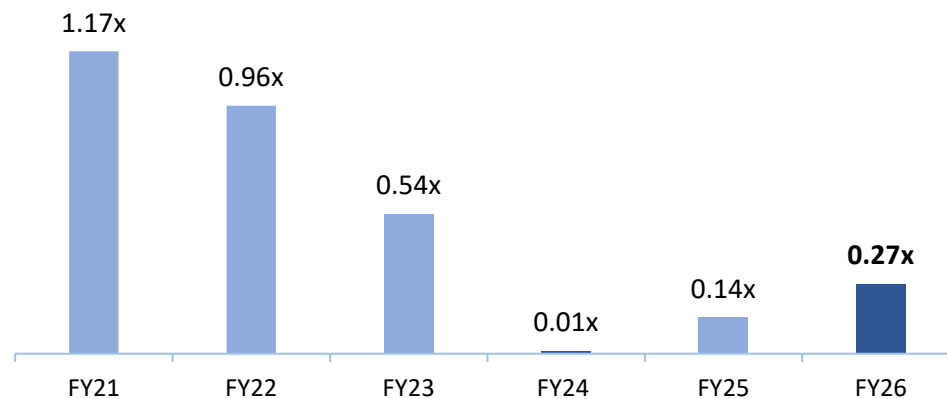
RoCE² (%)



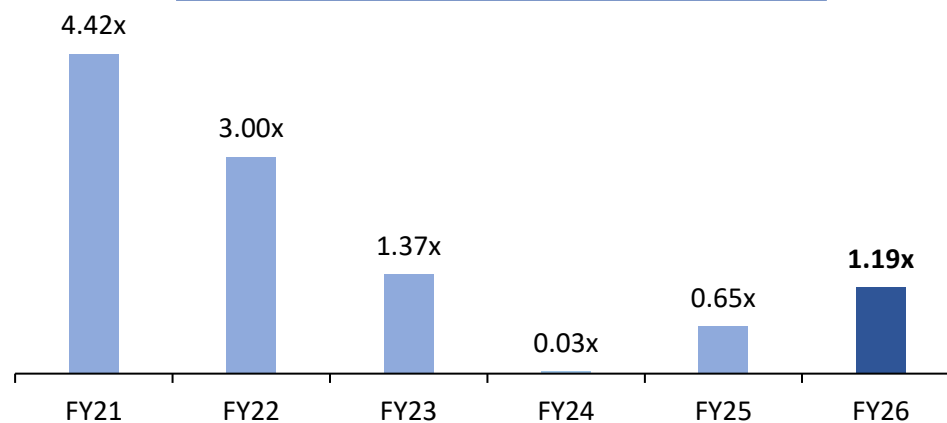
Note: 1. Adjusted for FY25 & FY26. 2. Return on Capital Employed (RoCE) is calculated as EBIT as a percentage of Capital Employed, where Capital Employed refers to the sum of total equity and Net Debt. EBIT is calculated as Operating EBITDA minus depreciation and amortization.

Well-Positioned to Pursue Growth Opportunities

Net debt / Equity¹



Net debt / Operating EBITDA²



Raised capital at competitive rates



In January 2022, issued a USD 400 million 4.95% sustainability-linked senior secured notes due in 2029



International Ratings

Investment Grade Ratings

- ✓ Fitch: BBB- / Stable
- ✓ S&P Global: BBB- / Stable
- ✓ Moody's: Ba1 / Positive



Domestic Ratings

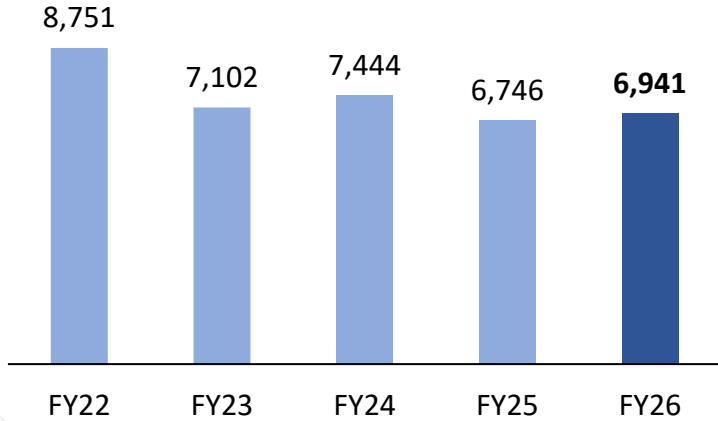
- ✓ CARE AA+ / Stable

Note: 1: Net debt is calculated as total debt minus cash and cash equivalents, bank balances other than cash and cash equivalents and current investments.
 2: Operating EBITDA is calculated as profit before exceptional items and tax minus other income plus finance costs, depreciation and amortization expense.

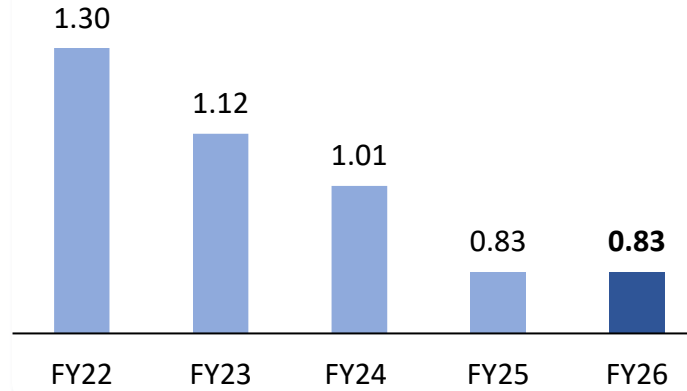
Sustainability



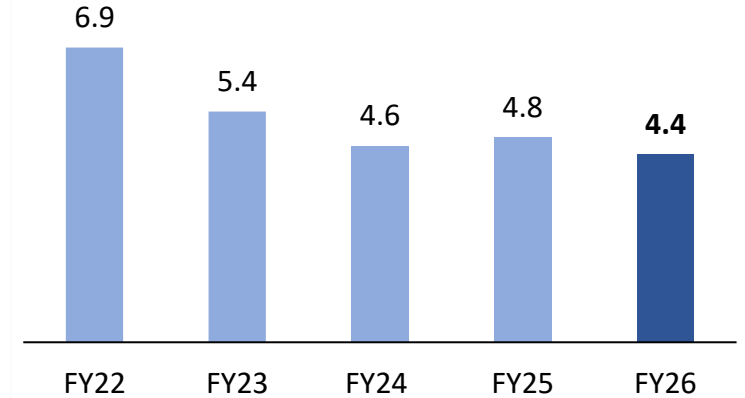
Specific Energy Consumption (KJ/tch)



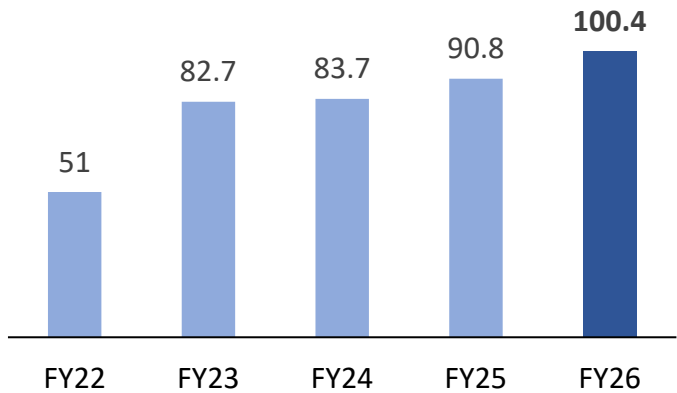
GHG Emission Intensity (Kg CO₂ e/tch)



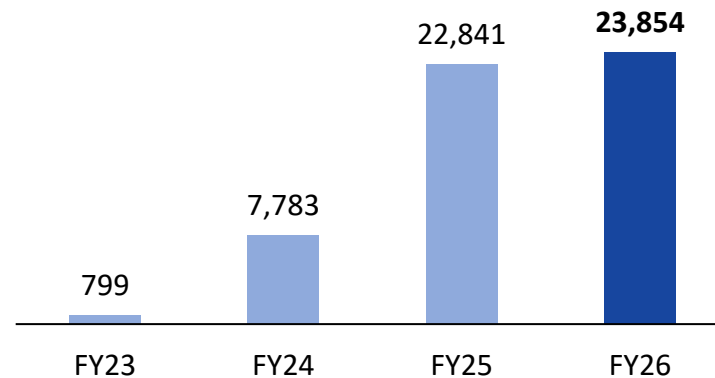
Specific Freshwater Consumption (L/tch)



Waste Recycled (%)



Renewable Energy (MWh)



MORNINGSTAR | **SUSTAINALYTICS** - Rated as "Low Risk"



- CDPs Management Level "A-" rating for Climate Change

Note: 1) FY26 figures are unaudited and may change after completion of Audit while FY25 numbers are audited 2) tch- Total Cargo Handled, KJ- Kilo Joule, MWh-Mega Watt Hours
 3) Information pertains to Indian operations excluding Mangalore Container, Paradip Coal and PNP port.

Key Intervention Areas



Health and Nutrition



Education



Agriculture and Allied Livelihoods



Water, Environment and Sanitation



Waste Management



Skill Development



Art, Culture and Heritage



Sports Promotion



Health and Nutrition



- **73,375** lives touched through health initiatives across the locations



Water, Environment and Sanitation



- **2.5 lakh** litre water tank constructed for water storage
- **12,000** plants / samplings maintained / planted in Miyawaki forest in Paradip, Mangalore & Ennore



Education



- **37,214** students were supported through education interventions



Waste Management



- **2,00,000** people covered under waste management projects across locations

To Conclude



JSW Infrastructure is the second largest private port operator in India with 183 mtpa capacity



Strategically located assets with well equipped Ports and Terminals with Multi-Modal Evacuation Channels



Well placed to reap the benefits of the growing Indian economy, massive infra build, strong cargo growth potential and limited competition in the sector



Growth Strategy of low-cost brownfield expansion, developing high-margin greenfield ports with clear visibility of group Cargo and benefits of Government's Privatization drive. Increasing capacity to 400mtpa by FY30.



Fast growing Logistics platform; targeting a topline of ₹ 8,000+ crore by FY30.



Track record of Robust Operational and Financial Metrics



Strong balance sheet with Investment-Grade ratings from Fitch and S&P; well positioned to pursue value-accretive organic and inorganic growth

Appendix



Key information- Cargo Handled

Legal Entity		(MMT)			
		Q4 FY25	Q4 FY26	FY25	FY26
Indian Operations					
JSW Infrastructure Limited	Standalone	0.52	0.67	2.43	2.99
JSW Jaigarh Port Limited	Jaigarh Port	4.92	5.26	19.85	20.27
JSW Dharamtar Port Private Limited	Dharamtar Port	6.12	6.43	23.14	24.53
South West Port Limited	Goa	1.80	2.20	6.36	8.55
JSW Paradip Terminal Private Limited	Paradip, Iron Ore	2.21	1.95	11.42	7.26
Paradip East Quay Coal Terminal Limited	Paradip, Coal Exports	5.35	5.69	18.93	19.01
Ennore Coal Terminal Private Limited	Ennore Coal	2.94	2.70	10.19	10.38
Ennore Bulk Terminal Private Limited	Ennore Bulk	0.95	0.54	2.12	1.65
Mangalore Coal Terminal Private Limited	Mangalore Coal	1.71	2.02	6.26	6.27
JSW Mangalore Container Terminal Private	Mangalore Container	0.54	0.60	2.38	2.49
PNP Maritime Services Private Limited	PNP Port	1.34	1.12	5.49	5.34
JSW JNPT Liquid Terminal Private Limited	JNPA Liquid Terminal	0.11	0.26	0.20	1.30
JSW Tuticorin Multipurpose Terminal Pvt Ltd	Tuticorin Dry Bulk	0.85	1.46	0.85	4.99
Overseas Operations					
JSW Middle East Liquid Terminal Corp	Liquid Terminal UAE	1.89	0.72	7.32	5.71
JSW Terminal (Middle East) FZE	Port of Fujairah	-	-	-	0.84
Total Cargo Handled		31	32	117	122

Note: The Company secured an incentive for 0.8 MT of incremental cargo handled at the Port of Fujairah, exceeding the volumes under the current O&M contract.

Overview of License Regime - GPWIS and LSFTO

- Both GPWIS and LSFTO schemes represent a significant shift in Indian Railways' approach to freight logistics-moving from a state-controlled model to a public-private partnership framework. These initiatives not only unlock investment opportunities but also aim to modernize India's freight infrastructure, reduce logistics costs and improve the competitiveness of Indian industry on a global scale.
- Both schemes foster private participation, infrastructure modernization and cost-effective logistics, aligning with India's broader economic and environmental goals.

GPWIS

LSFTO

Launch Year

2018

2020

Target Commodities

Coal, cement, ore, petroleum products (general freight)

Steel, chemicals, fly ash, edible oil, alumina (specialized freight)

Wagon Type

General-purpose wagons

Specialized wagons

Freight Rebate

10% for 15 years (capped at capital recovery)

12% for 20 years

Operational Flexibility

Open access to transport any commodity

No freight for empty movement, market-based terminal charges

Demurrage Charges

Same as standard Indian Railways demurrage charge

No demurrage at private terminals

Strategic Goals

Reduce public capital dependency, improve logistics

Promote modal shift, reduce emissions, boost bulk transport efficiency

BOBSNS

BOGIE OPEN BOTTOM SIDE DISCHARGE WAGON : These wagons can be used for various bulk cargo which can be unloaded quickly by opening side doors. Cargo like coal and iron ore are transported in these wagons to reduce unloading time at the destination.



GPWIS

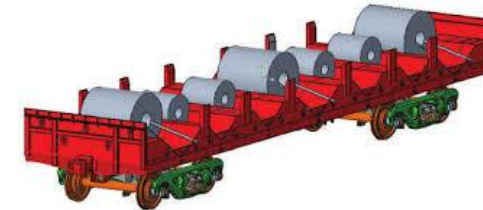


BOXHNL

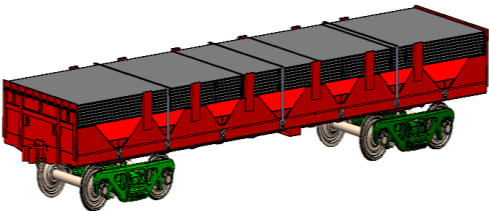
BOGIE OPEN SPECIAL AIR BRAKE HIGH CAPACITY WAGON: These wagon comes under open wagon category. These wagons are of top loading and side discharge type and generally used for transportation of coal cargo.

BFNV

BOGIE FLAT PNEUMATIC V-GROOVE WAGON : These specialised wagons are used for transportation of steel coils. Grooves on the base helps to stabilise coils which otherwise require dunnage and ropes to hold the coils.



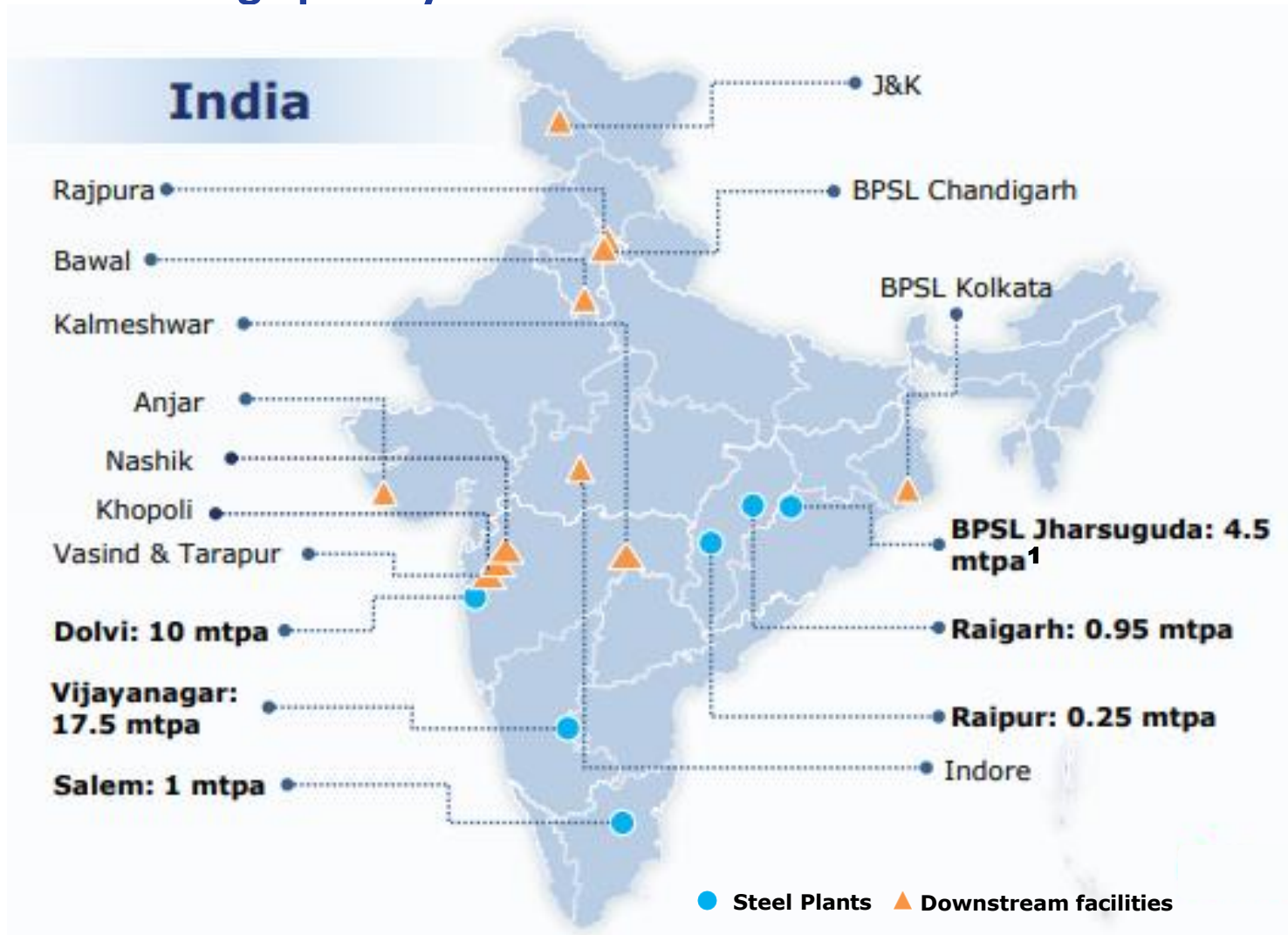
LSFTO



CMP

COIL MULTI PURPOSE WAGON : These wagons will be able to handle steel coils as well as steel flats. On the grooves, this steel products can be arranged in a manner that these wagon will be able to transport both steel coils and steel flats. Its capacity is comparably lesser than the BFNV wagons.

Most Geographically Diversified Steel Producer in India



- ❖ India's largest steel producer
- ❖ Consol. capacity of 35.7 mtpa
- ❖ Targeting 51.5 mtpa capacity by FY31²

THANK YOU



Investor Relations Contact
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