



KIRLOSKAR BROTHERS LIMITED

A Kirloskar Group Company

Enriching Lives

SEC/ F:25

August 01, 2025

BSE Limited

Corporate Relationship Department,
2nd Floor, New Trading Ring,
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai – 400 001.

National Stock Exchange of India Ltd.

5th Floor, Exchange Plaza,
Bandra (East),
Mumbai - 400 051.

(BSE Scrip Code – 500241)

(NSE Symbol - KIRLOSBROS)

Dear Sir/Madam,

Sub: Investor Presentation - Conference Call with Analyst scheduled on August 04, 2025

Ref: Regulation 30 read with Schedule III, Part A Para A of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

In terms of the subject referred regulation, please find enclosed herewith Investor Presentation in relation to the Unaudited Financial Results of the Company for the quarter ended on June 30, 2025.

Please note that the above will be uploaded on the Company's website at www.kirloskarpumps.com as well.

You are requested to take the same on records.

Thanking you,

Yours faithfully,

For **KIRLOSKAR BROTHERS LIMITED**

Devang Trivedi
Company Secretary

Encl.: As above.



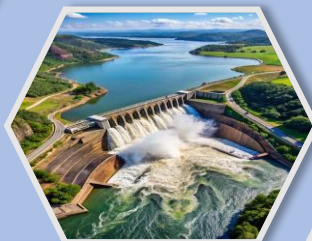
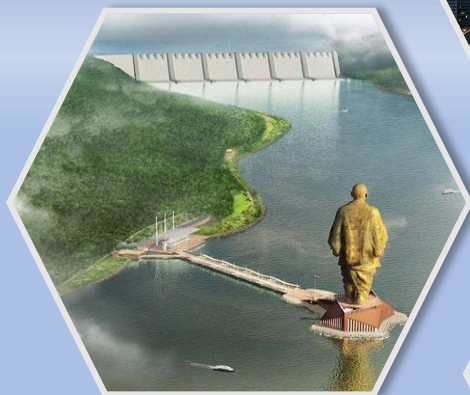
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KIRLOSKAR BROTHERS LIMITED

Established 1888

A Kirloskar Group Company

INVESTOR PRESENTATION
Q1FY26



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KBL's Transformation: Unleashing our True Potential



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At KBL Transformation is not a destination but a continuous journey of evolution and reinvention.

Our Ongoing Transformation Journey

- **Transformation = Culture at KBL**
 - Not just change, but a deep-rooted mindset of growth, resilience, and excellence.
- **External Adaptation + Internal Reinvention**
 - Responding to market shifts while evolving from within.
- **Future-Ready through Innovation**
 - Embracing Industry 4.0
 - Leveraging automation, smart monitoring & data analytics
 - Driving efficiency and superior customer experience
- **Technology-Driven, People-Led**
 - Our empowered teams are the real force behind innovation and progress.
- **Guided by Legacy, Fueled by Purpose**
 - A century of engineering excellence shapes our mission to make India self-reliant in fluid management.
- **Sustainable & Inclusive Outlook**
 - Building a smarter future—sustainable, inclusive, and impactful for all stakeholders.



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Q1FY26 Highlights



Q1FY26 Consolidated Highlights



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Revenue from Operations



-5.0% y-o-y

Rs. 979 crores

EBITDA



+0.5% y-o-y

Rs. 128 crores

PAT



+2.9% y-o-y

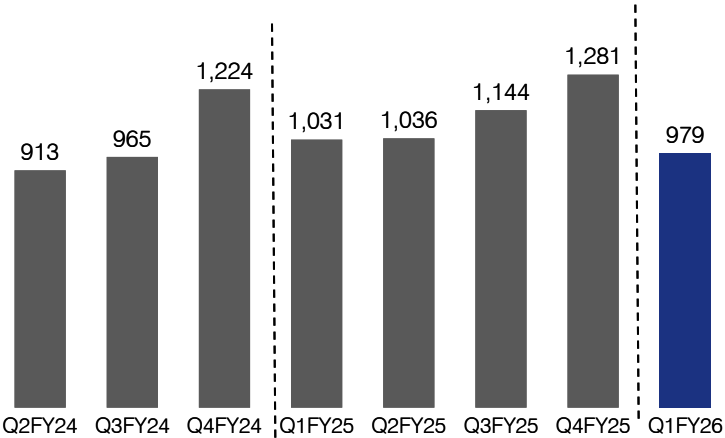
Rs. 68 crores

Consolidated Financial Trend

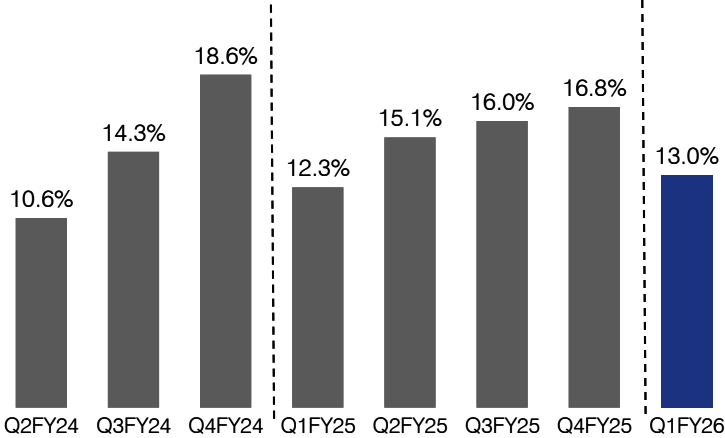


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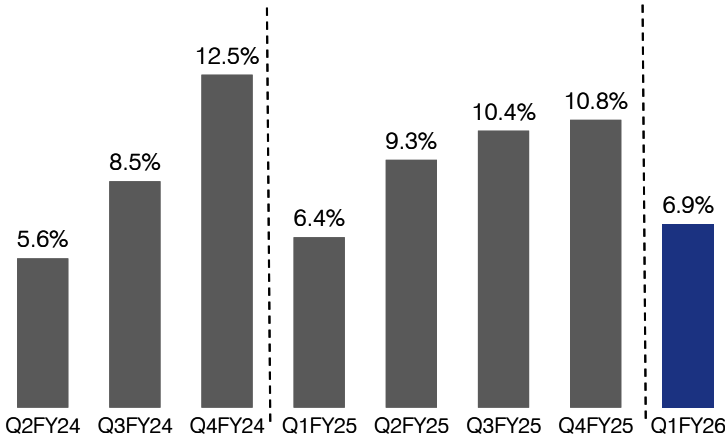
Revenue (Rs.in Crs.)



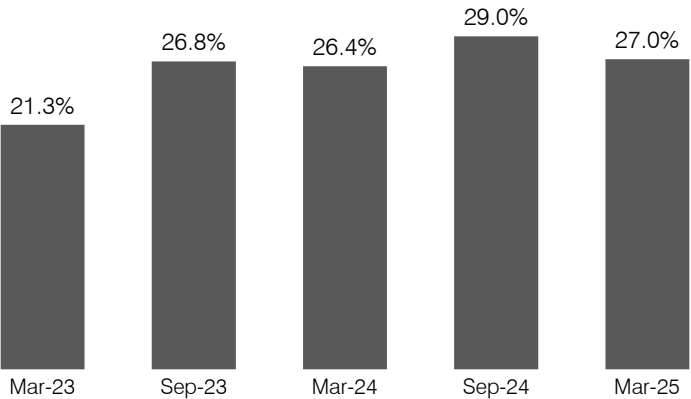
EBITDA Margin (%)



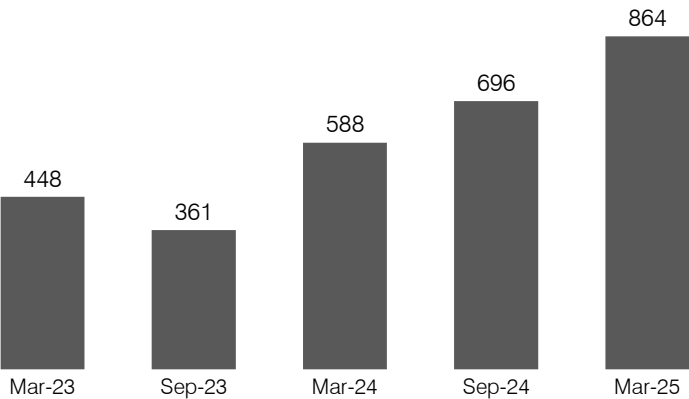
PAT Margin (%)



ROCE % (Annualised)



Investments* (Rs.in Crs.)



* incl. cash & cash equivalents and long term investments other than in group companies

Consolidated Profit & Loss Statement



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Particulars (In Rs. Cr.)	Q1FY26	Q1FY25	YoY
Net Revenue from Operations	979.0	1,030.9	-5.0%
Other Income	15.9	15.3	
COGS	466.3	520.3	
Employee Expenses	184.4	174.5	
Other Expenses	216.6	224.4	
EBITDA	127.6	127.0	0.5%
EBITDA Margin (%)¹	13.0%	12.3%	70 bps
Finance Costs	6.2	5.8	
Depreciation	22.8	21.3	
Exceptional Item	0.3	0.0	
PBT	98.3	99.9	-1.6%
Taxes	27.8	29.2	
Share in profit of joint venture company	-3.0	-5.1	
Reported PAT	67.5	65.6	2.9%
PAT Margin (%)¹	6.9%	6.4%	50 bps
Earnings Per Share (EPS)	8.4	8.2	

¹ EBITDA & Reported PAT margin is % to Net Revenue from Operations

Q1FY26 Key Financials Performance



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(Rs.in Crs.)

Companies	KBL		KCPL		KPML*		KBIBV		Elimination		Total		Growth
	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	YoY
Revenue	621	665	15	11	151	160	337	344	(145)	(149)	979	1,031	(5.0%)
EBITDA	79	72	3	2	19	19	24	33	3	1	128	127	0.5%
EBITDA %	12.8%	10.8%	22.9%	20.7%	12.5%	12.0%	7.0%	9.6%	-	-	13.0%	12.3%	70 bps

* KPML includes TKSL (wholly owned subsidiary) from Q3FY25 onwards

Q1FY26 KBIBV Group Financials



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(Rs.in Crs.)

Companies	SPP UK		SPP Inc (USA)		Dutch Group		KBTL (Thailand+ Singapore)		SPP Mena		SA Group		KBIBV Standalone		Elimination		KBIBV Group		Growth
	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	Q1FY26	Q1FY25	YoY
Revenue	162	146	124	136	12	11	28	46	1	2	20	11	0	0	(10)	(8)	337	344	(2%)
EBITDA	10	9	14	20	(2)	(3)	0	3	0	1	4	2	-3	0	1	1	24	33	(29%)
EBITDA %	6.0%	6.2%	11.0%	14.4%	(16%)	(27%)	(1%)	7%	(31%)	32%	20%	19%	-	-	-	-	7.0%	9.6%	(26 bps)

Domestic & Overseas Orderbook Position



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Robust Orderbook Implying Strong Revenue Visibility

Orderbook and Pending Order Position (In Rs. crores)

KBL & Domestic Subsidiaries	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	Q1 FY26
Orders received	943	754	818	1,007	932
Pending Orderbook (A+B)	2,022	1,954	1,967	1,910	2,077
KBL Standalone (A)*	1,956	1,877	1,874	1,804	1,929
Domestic Subsidiaries (B)	66	77	93	105	148

Overseas Subsidiaries	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	Q1 FY26
Orders Received	283	408	503	466	404
Pending Orderbook	1,031	1,103	1,127	1,208	1,268

Total	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	Q1 FY26
Orders Received	1,225	1,162	1,320	1,474	1,336
Pending Orderbook	3,053	3,057	3,094	3,118	3,345

* Pending Orderbook does not include orders for small pump business as this is a made to stock business. Small pump business orders received and executed in the same month from stock

Standalone Pending Order book (In Rs. crores)

Sector^	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	Q1 FY26
Irrigation + Water Resource Mgmt.	887	873	843	852	913
Power	497	473	499	457	461
Oil & Gas	41	48	66	48	57
Marine & Defence	27	37	30	31	61
Industry	152	132	127	168	162
Building & Construction	155	131	125	135	141
Customer Support & ESD	110	104	116	72	100
Valves	87	80	68	41	34
Total	1,956	1,877	1,874	1,804	1,929

^ Sectoral orderbook is only for standalone business. KBL consolidated Orderbook includes orderbook of all domestic as well as its International companies



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About Us



Company at Glance



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Presence Since 137+ Years

One of the 1st AtmaNirbhar organization. India's 1st & largest pump manufacturer. Made some of India's 1st engineering products including Iron Plough, Centrifugal Pumps, Diesel Engines, Motors and Air Compressors

Inherent Strength Built Over Time

Manufacturing Facilities 10 Domestic & 7 International

Strategically located across various trading blocks – Expanding geographic presence with reduced turnaround time, cost-efficiency with adherence to National and International standards and sourcing norms

Product Offering 250+

SKUs
100,000+

Increasing the mix of value-added products, end-to-end solutions and new product launches by leveraging technological advances like 3-D Printing, IoT, AI, AR and VR

Diversified Product Portfolio Catering to Wider Applications

Diversified Application 20+ Sectors

Active Customer Base
2,500+

Growing presence in fast growing ASEAN region. Strong presence in sunrise sectors like chemicals, petrochemicals, waste-water management & renewable energy

Catering to
6 Continents &
120+ Countries

Serving Millions of
farmers, households and
industries everyday

Providing drinking water to
over 35% of India's
population

Providing cutting-edge,
energy-efficient and
environmentally
sustainable innovations

India's 1st and leading
manufacturer of critical
pumps for nuclear power
plants

Strong Brand Portfolio



Legacy of 137+ Years



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IDEATE

1888-1958

Establishment & Restructuring Phase

- **1888** : Establishment of Kirloskar Brothers
- **1920** : Incorporation of KBL
- **1941** : Divested machine tool business to form The Mysore Kirloskar Ltd.
- **1946** : Divested electrical business to form Kirloskar Electric Co. Ltd & internal combustion engine business to form Kirloskar Oil Engines Ltd.
- **1958** : Divested air compressors business to form Kirloskar Pneumatic Co. Ltd.

INNOVATE

1988-2009

Acquisition Phase

- **1988** : Established Kirloskar Ebara Pumps Ltd. & Acquired Hematic Motors Pvt. Ltd.
- **2003** : Acquired SPP Pumps Ltd (UK)
- **2004** : Incorporation of SPP Pumps Inc. (USA)
- **2006** : JV with Corrocoat Ltd, UK to form Kirloskar Corrocoat Pvt Ltd
- **2007** : Acquired The Kolhapur Steel Limited & Incorporation of Kirloskar Brothers International B.V. (The Netherlands)
- **2008** : Incorporation of Kirloskar Pompen B.V. (The Netherlands) & Incorporation of Kirloskar Brothers (Thailand) Ltd.

2010-2020

Strategic & Technology Expansion

- **2010** : Acquired Braybar Pumps (Pty) Ltd. (South Africa)
- **2014** : Acquired SyncroFlo Inc. (USA)
- **2015** : Acquired Rodelta Pumps International B.V. (The Netherlands)
- Investment in Data Analytics , Remote Monitoring of Pumps Additive Manufacturing, Virtual Reality, Artificial Intelligence & Augmented Reality

IMPLEMENT

2021 Onwards

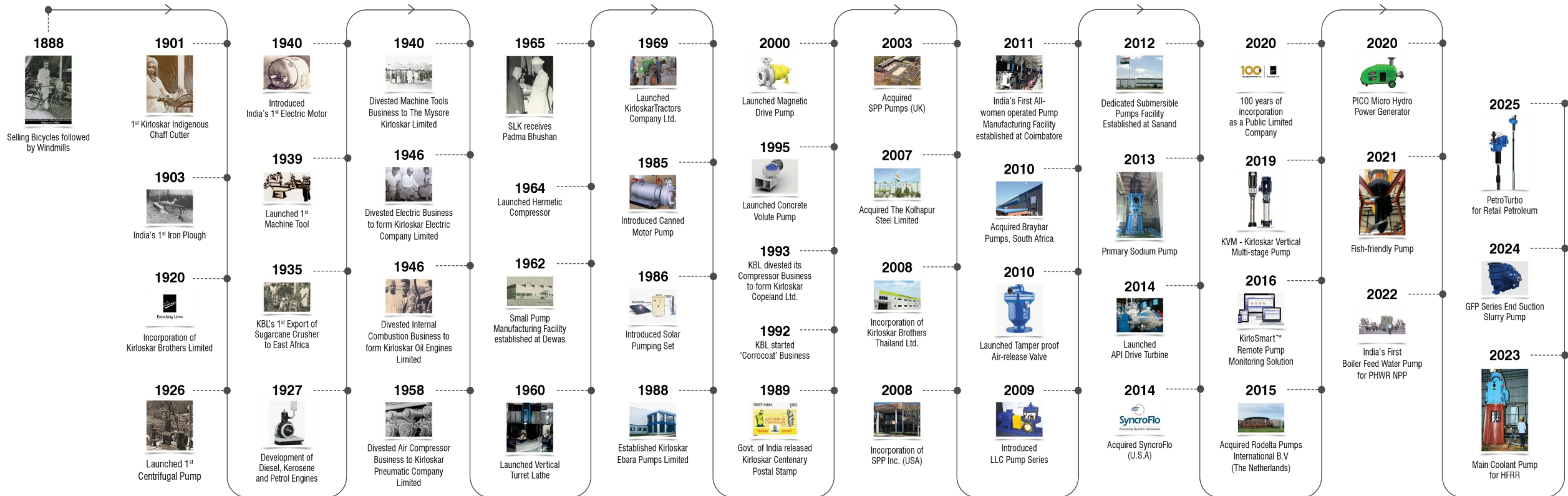
Monetise

- Monetize data and insights for customers
- Leverage technology to gain market share
- Deepen geographic presence
- Debottleneck the capacities
- Cost Optimization
- Value Added Products

The Timeless Journey of Unmatched Excellence



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Our Business & Product line



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Our Presence

- 75+ Types of Pumps
- Flow up to 120,000 m³/hr. (529,000 US GPM)
- Pumps ranging from 0.3 KW to 30 MW
- Pump Head up to 3,200 m (4,539 psi)
- 30+ Types of Valves
- Valves with diameter 6 mm to 5000 mm
- Low Tension (LT) induction motors up to 315 frame
- PICO and Mini Hydel Turbines (3kW-10MW)
- EPC Capabilities
- Lowest Life Cycle Cost LLC[™] pumps world-wide

Our Business

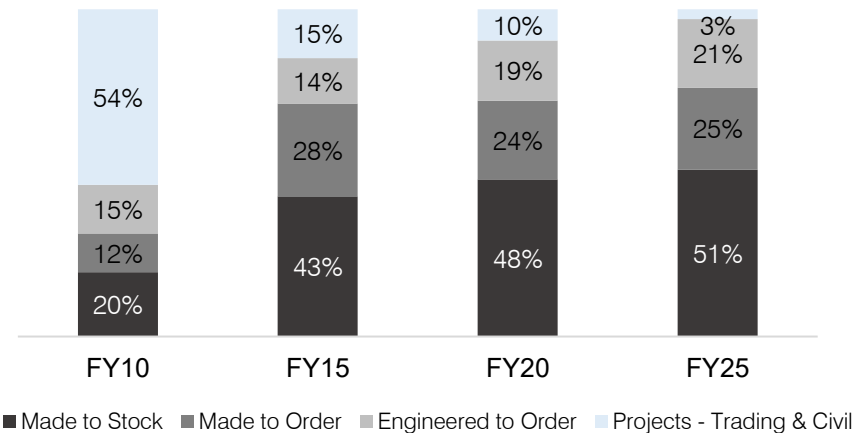
Large & Medium pumping solutions for complex fluid management system

Valves for industrial and large-scale applications

Small pumps for day-to-day use at households and farms

Hydel turbines

Improving Product Mix



Note: Pumps installed in Projects jobs are included in Engineered to Order

Only KBL (Standalone) has a presence in EPC/Projects Business. No international subsidiaries are present in EPC/Projects.

Application

Oil & Gas



Marine & Defence



Bldg. & Const.



Small Pumps



Water Resource



Irrigation



Industry



Power

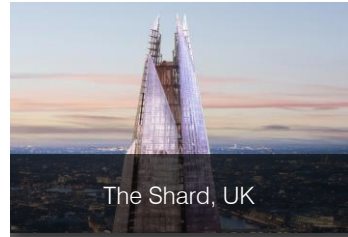


Exemplary Endeavors: Charting Our Path of Impact



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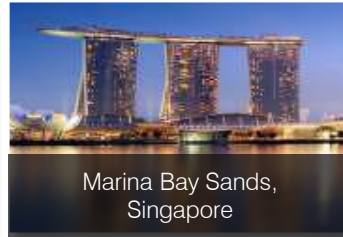
Building & Construction



The Shard, UK



Hong Kong-Zhuhai-Macau Bridge



Marina Bay Sands, Singapore



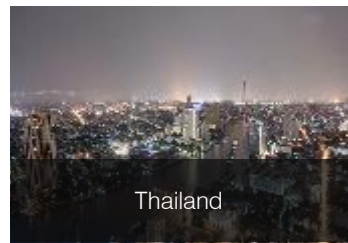
Atal Tunnel, India



Statue of Unity, India

KBL's pumping solutions are operational in many of the world's iconic buildings

Municipal Water



Thailand



South Africa



Uttar Pradesh, India



Mumbai, India



Thames River, UK



Gwari Culvert, India

Power



ITER, France



CGPL Mundhra, India



Bhavini Fast Breeder Reactor, India



EGAT, Thailand



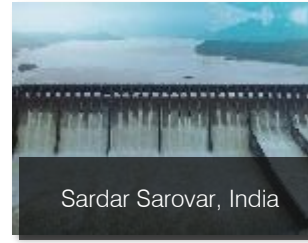
NTPC, India



Prairie State Energy, Illinois, US

KBL is first & leading manufacturer of critical pumps for nuclear power in India. Supplied primary & secondary sodium pump to Bhavini and specialised pump sets for International Thermonuclear Experimental Reactor project in France, world's largest magnetic confinement plasma physics experiment

Irrigation



Sardar Sarovar, India



Senegal

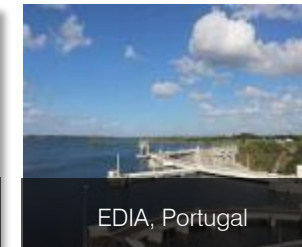


Laos

KBL's irrigation solutions are operational across the world



Egypt



EDIA, Portugal



Bheema, India

State-Of-The-Art Manufacturing Facilities



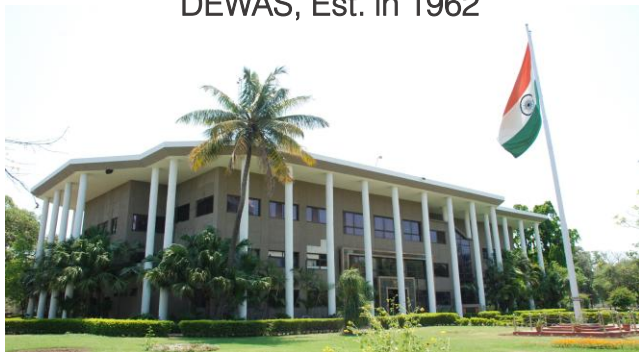
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KIRLOSKARVADI, Est. in 1910



KBL's 1st plant, with facilities starting from foundry to machining, assembly, & testing of various pumps ranging from 5 kW to 4,500 kW

DEWAS, Est. in 1962



2nd largest plant with well-equipped facility for various pumps for agriculture, domestic water supply, dewatering, and industrial utility applications up to 30 HP

KANIYUR, Est in 2011



Dedicated for domestic pumps. World's 1st & only pump plant to deploy 100% women workforce. Equipped with computerized testing setup and semi-mechanized assembly setup for pump manufacturing

SANAND, Est. in 2012



"The Submersible Pump Capital of India". Factory exclusively for borewell submersible pumps. End-to-end capabilities from designing and manufacturing to testing and packing of pumps for all categories like agriculture, domestic & industry segment

SHIRWAL, Est. in 2014



Dedicated pump assembly facility for HYPN systems and IoT-enabled panels. Well-equipped with latest state-of-the-art technologies necessary for ensuring assured precision and superior inspection standards

Our Innovative Solutions



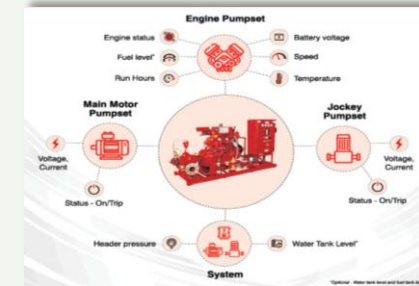
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Solar Pumping System



Concrete Volute Pump



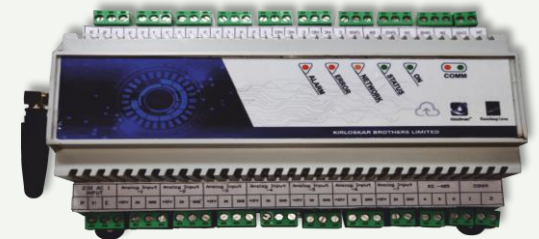
KirloSmart Fire



Lowest Life-Cycle Cost (LLC)™ Pump



Primary Cooling Pump (PCP) for Pressurised Heavy Water Reactor (PHWR)



IoT based remote monitoring solution KirloSmart



Augmented Reality Mobile Training



Additive Manufacturing 3D Printer



Petro Turbo

Global Footprint Through Local Presence



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Registered Office and Global Headquarter

- 1 Pune, India

Overseas Presence

- 2 Atlanta, US (Manufacturing)
- 3 Coleford, UK (Manufacturing)
- 4 Almelo, The Netherlands (Manufacturing)
- 5 Johannesburg, South Africa (Manufacturing)
- 6 Jebel Ali, UAE (Assembly and warehousing)
- 7 Cairo, Egypt (Assembly, testing and services)
- 8 Bangkok, Thailand (Assembly, testing and services)
- 9 Aberdeen (Service centre)
- 10 Hyde, Manchester (Service centre)
- 11 Theale, Reading (Office)

Manufacturing Plants in India

- 12 **Kirloskarvadi**
 - Location: Maharashtra
 - Products: Various types of pumps ranging from 5 kW to 30 MW and valves ranging from 25 mm – 5 m
 - 13 **Shirwal**
 - Location: Maharashtra
 - Products: Hydro-pneumatic Systems and IOT Panels
 - 14 **Sanand**
 - Location: Gujarat
 - Products: Submersible pumps ranging from 0.37 kW to 44 kW
 - 15 **Kaniyur**
 - Location: Tamil Nadu
 - Products: Domestic mini pumps ranging from 0.37 kW to 1.1 kW
 - 16 **Dewas**
 - Location: Madhya Pradesh
 - Products: Industry and domestic pumps ranging from 0.37 kW to 22 kW
- Location Products manufactured

Domestic Subsidiaries and Associate companies

- 17 Karad Projects and Motors Limited, Karad
- 18 The Kolhapur Steel Limited, Kolhapur
- 19 Kirloskar Corrocoat Private Limited, Kirloskarvadi
- 20 Kirloskar Ebara Pumps Limited, Kirloskarvadi

Regional Offices

- 21 New Delhi
- 22 Chennai
- 23 Kolkata
- 24 Mumbai
- 25 Ahmedabad
- 26 Bengaluru
- 27 Hyderabad



Highly Qualified Management Team



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Mr. Sanjay Kirloskar
Chairman & Managing Director

- Holds Bachelor's in Science degree in Mechanical Engineering from the Illinois Institute of Technology in Chicago, USA.
- On Boards of DCM Shriram Industries Ltd., Kirloskar Ebara Pumps Ltd., Kirloskar Brothers International B.V., The Netherlands and SPP Pumps Limited, UK.



Mr. Alok Kirloskar
Director – KBL
Managing Director – SPP UK
CEO – KBI B.V.

- Bachelor in Business Administration with concentration in finance from Carnegie Mellon University, Pittsburgh. He has the honour to be on the deans list for this academic excellence.
- Worked in a start-up from 2006 as Business Development manager at Sonasoft Inc (Microsoft CSP)
- Headed industry sector in KBL and on board since July 18th 2012. MD of SPP Pumps Ltd since January 2012 and CEO of Kirloskar Brothers International BV since January 2015.



Ms. Rama Kirloskar
Joint Managing Director- KBL
Managing Director – KEPL

- Double major in Mathematics and Biology from Bryn Mawr College, USA.
- Served as a GM and Head of Product Portfolio Management at KBL. Prior to KBL, worked with Polaris Partners, Boston based VC firm as well as Visterra Inc., an MIT biotech start-up company.
- Also on the Board of Karad Projects and Motors Limited, Prakar Investments Pvt Ltd. And KPT Industries Limited (earlier known as Kulkarni Power Tools Limited)



Mr. Bhavesh Chheda
Chief Financial Officer

- Mr. Chheda, 49 years, is a qualified Chartered Accountant and has completed Executive Postgraduate Diploma in Business Management from Symbiosis Institute of Management.
- He brings with him 23 years of experience in finance planning and analysis, risk management, treasury management, merger & acquisition, ERP implementation and international subsidiary operations.
- Worked with various reputed organizations, prior to joining the Company.

Board of Directors



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Mr. M. S. Unnikrishnan
Independent Director

- Former MD & CEO of Thermax Group
- Graduate in Mechanical Engineering from VNIT, Nagpur, Advanced Management Program from the Harvard Business School, Boston, USA
- CEO of IITB-Monash Research Academy
- Currently on the Board of KEC Int. Ltd., Greaves Cotton Ltd.



Mr. Shrinivas V. Dempo
Independent Director

- M.Sc. in Industrial Administration & Finance from Carnegie Mellon University, USA
- Chairman Goa-based Dempo Group, with diversified interests in industries like shipbuilding, food processing, real estate and newspaper publishing



Mr. Shobinder Duggal
Independent Director

- Bachelors in Economics (Hons.) from St. Stephens College, Delhi University and member of ICAI
- 35 years of work experience with the Nestle group in India and Switzerland.
- Currently on the Board of PI Industries, Sanofi Consumers, ABB India Ltd.



Ms. Ramni Nirula
Independent Director

- Holds Bachelor's Degree in Economic and Master's degree in Business Administration from Delhi University
- Retired Senior General Manager of ICICI Bank Ltd.
- >4 decades of experience in financial services sector. Currently Ms. Nirula is on the Boards of HEG Limited, Usha Martin Ltd.



Ms. Rekha Sethi
Independent Director

- An alumnus of St Stephens College, Delhi University. Director General of the All-India Management Association (AIMA), the apex body for management in India.
- Serving on the Boards of some leading Indian companies as an Independent Director



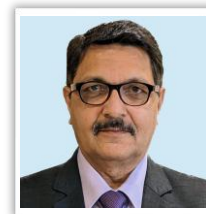
Mr. Vivek Pendharkar
Independent Director

- SEP, Business Admin from Stanford University Graduate School of Business
- Technology executive with 30+ years of experience in Silicon Valley
- Held CEO roles for the past 15 years
- Worked across Fortune 500 companies and early-stage venture-backed startups
- Led initiatives in successive breakthrough technologies



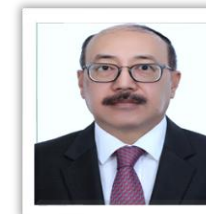
Mr. Vinayak Deshpande
Independent Director

- Graduate in Chemical Engineering from IIT, Kharagpur & 42+ years of experience in industrial domain
- Served as a Managing Director at Tata Honeywell in 2000, then at Tata Teleservices, HCC and Tata Projects
- Serves as a Board member for few of the leading Indian companies such as Voltas Ltd., Praj Industries Ltd., etc



Mr. Pradyumna Vyas
Additional Director - Independent Director

- Prof. Pradyumna Vyas is a former Director of National Institute of Design (NID), India's premier design institute.
- He is currently the senior Advisor for Design Promotion and Innovation at the Confederation of Indian Industry (CII), and President-elect of the World Design Organization (WDO).



Mr. Harsh Vardhan Shringla*
Additional Director - Independent Director

- Mr. Shringla, is a former Foreign Secretary (2020-22) of India. He has been Ambassador of India to the USA, Bangladesh & Thailand. Multilateral diplomat having experience & expertise in areas of geopolitics, international relations & conflict prevention.
- Mr. Shringla is a B.A. from St. Stephen's College, Delhi. He has been awarded a D. Litt (doctorate) honoris causa from ICFAI University, Sikkim. He is Strategic Advisor to a few leading corporates.

Long Standing Relationships with Marquee Clientele..



Enriching Lives





Enriching Lives

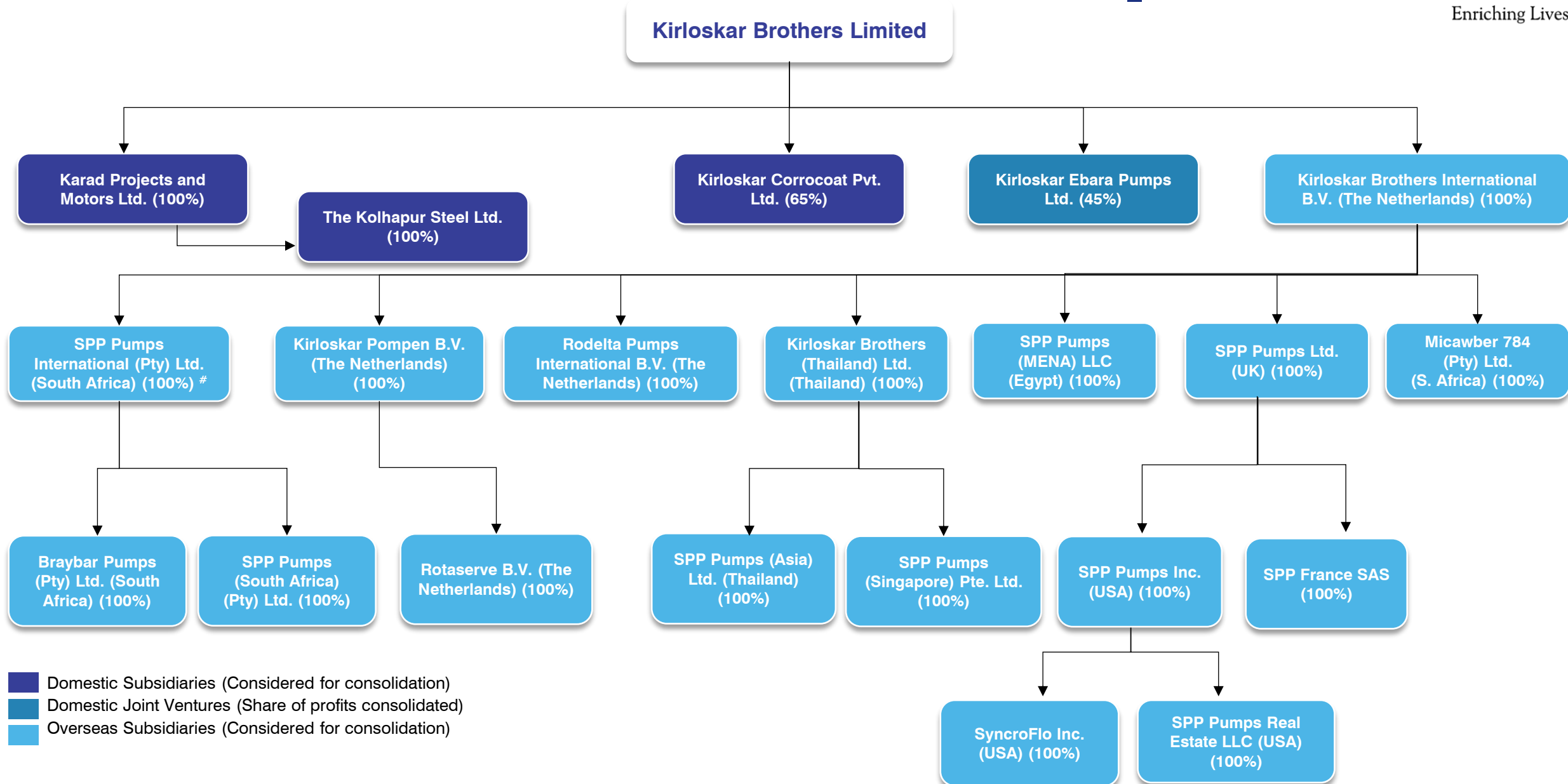
Our Joint Ventures & Subsidiaries



Group Structure



Enriching Lives



KBL is leveraging the localised global presence through cost-synergies, duty-free access and local sourcing norms



Cost Synergies

- Reduction in turnaround time
- Lower freight costs
- Subsidiaries do local value addition in terms of components, repair, maintenance and services, etc.



Duty-free Access & preference to Local Manufacturers

- Duty-free access to fast-growing ASEAN region through value addition done in Thailand. (20%-30% depending on product)
- Local manufacturers preference especially in Thailand & South Africa
- SPP Inc. USA is compliant with the new 'Buy American' program and meets the criteria



Local Sourcing Norms and Regulations

- Presence in South Africa through a local subsidiary to comply with Broad-Based Black Economic Empowerment Program
- Other subsidiaries in the US, UK and Netherland to adhere to local sourcing norms

Kirloskar Brothers International B.V.*, The Netherlands



Enriching Lives

Genesis

- Wholly owned subsidiary of Kirloskar Brothers Limited
- SPV established as an Investment Company for all international businesses

Product Profile

- Bi-directional Axial Flow pumps
- Chemical pumps
- Containerized pump sets
- Electro-submersible pumps
- Transformer oil pumps
- Fire fighting pumps & Products
- Plumbing & HVAC Systems
- Pre-packaged Pumping Systems
- Water supply pumps

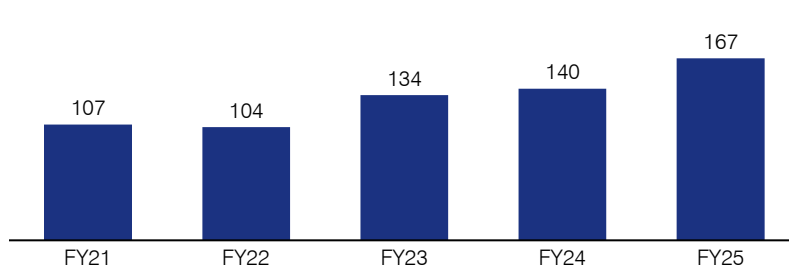
Industries Catered

- Chemicals
- Commercial Building Services
- District Heating
- Dry Dock
- Fire
- Municipal Water Supply
- Oil & Gas
- Water treatment & supply
- Pulp & Paper
- Flood Control
- HVAC
- Industrials
- Irrigation
- Mining
- Transformer
- Power

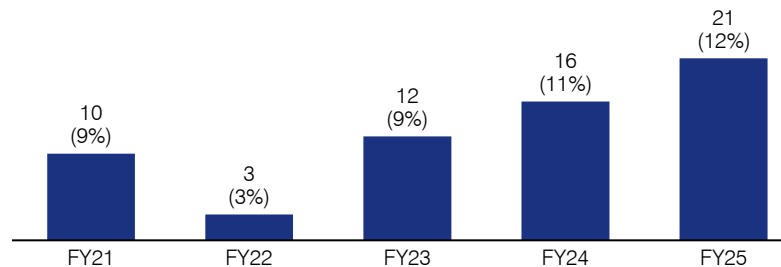
Geographies Catered

- Cambodia
- China
- Egypt
- France
- Iraq
- Italy
- Vietnam
- Laos
- USA
- Vietnam
- Malaysia
- Philippines
- Poland
- Singapore
- South Africa
- South-East Asia
- Thailand
- Turkey
- UAE
- UK

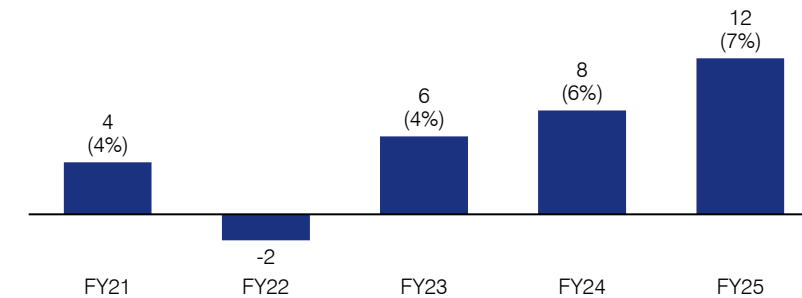
Revenue (€ Mn.)



EBITDA (€ Mn.) & EBITDA Margin (%)



PAT (€ Mn.) & PAT Margin (%)



* Holding company of all international businesses

SPP Pumps Limited



Enriching Lives



PUMPS



Genesis

- 145+ years of heritage with R&D, manufacturing and test facilities in the UK
- 1st in the world to offer a Factory Mutual approved MSMO pumps for efficient and cost-effective fire protection in high-rise buildings
- Highest market share in fire pump packages business
- **Current Orderbook: £ 92 million for SPP Group**

Product Profile

- Lowest Life Cycle Pumps for water
- Supply and industrial
- Firefighting pumps
- Transformer oil pumps
- Containerized pump sets
- Electro-submersible pumps
- Vertical Line shaft pumps
- Multi-Stage, Multi-Outlet pumps
- Framework & AMC Services contracts

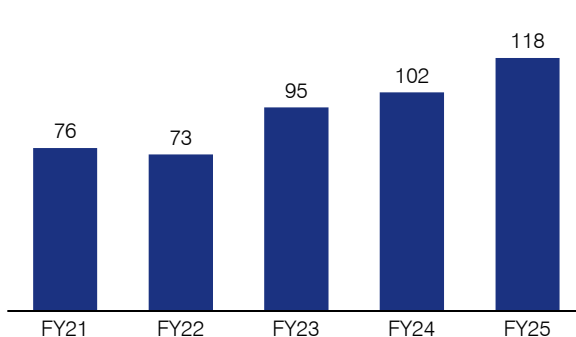
Industries Catered

- Commercial Building
- Transformer
- Oil & Gas
- Waste-Water Mgt
- Chemicals
- Flood Control
- Fire
- Power
- Municipal Water Supply
- Spares & Services
- Oil & Gas Upstream

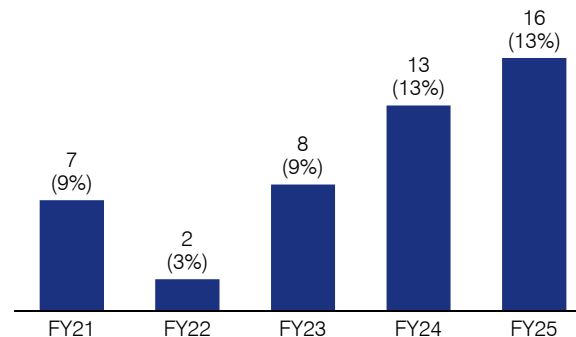
Geographies Catered

- Italy
- UK
- USA
- France
- Egypt
- UAE
- Singapore
- South Africa
- Poland
- South-East Asia

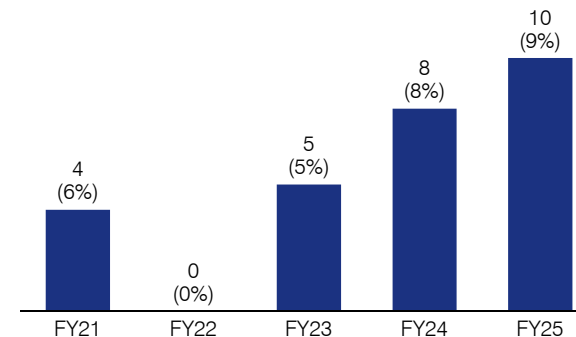
Revenue (£ Mn.)



EBITDA (£ Mn.) & EBITDA Margin (%)



PAT (£ Mn.) & PAT Margin (%)



Strategy

- Leading digital & innovative initiatives for KBL Group
- Pushing the maintenance services business which started in 2016.
- Diversifying the product profile
- Focus on the service business with large number of framework contracts

Dutch Entities Consolidated



Enriching Lives

Genesis

- Established by Sulzer in 1946, acquired by KBL in June 2015 is a leading manufacturer of API and Non-API pumps
- R&D, manufacturing and test facilities in Almelo, Netherlands
- **Current Orderbook: € 10 million**

Product Profile

- API Pumps conforming to API-610 standards, 12th edition
- Pumps for Municipal Water Supply complying to EU Standards
- Pre-fabricated Concrete Volute Pumps, Bi-directional Axial Flow Pumps
- After-sales & services for upgradation of pumps and pump stations in the Benelux region

Industries Catered

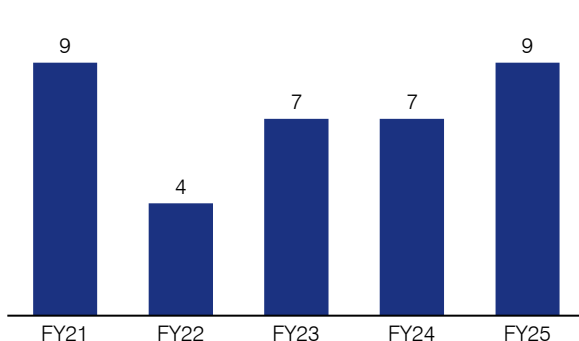
- Oil & Gas Midstream
- Waste-Water
- Oil & Gas Upstream
- Chemicals
- Pulp & Paper
- Water
- Power
- Dry Dock
- Irrigation
- Flood Control
- District Heating

Geographies Catered

- China
- Benelux
- Iraq
- South-East Asia
- Turkey
- UAE
- UK



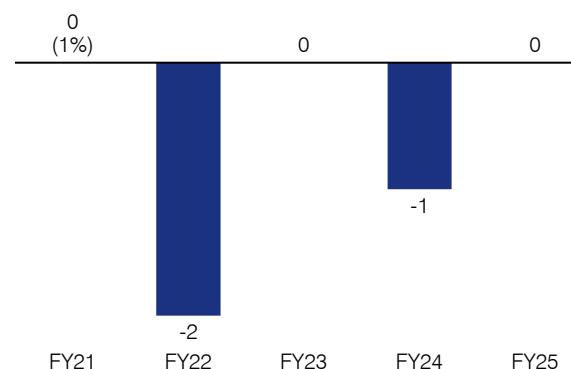
Revenue € Mn.)



EBITDA (€ Mn.) & EBITDA Margin (%)



PAT (€ Mn.) & PAT Margin (%)



Strategy

- Niche product launches – fish-friendly pumps; and OH5 pumps for Hydrogen Production
- Turnaround & improve profitability through a specialized product profile
- Leverage the brand profile and expand the geographic presence

Kirloskar Brothers (Thailand) Limited, Thailand



Enriching Lives

Genesis

- FM approved Assembly and packaging for sales of centrifugal pump-sets in South-East Asia
- Provides duty-free access to fast-growing ASEAN region through value addition done in Thailand.
- Current Orderbook: Thb 440 million

Product Profile

- Fire fighting pumps
- Chemical pumps
- Water supply pumps
- Waste water pumps
- Services (Field service and service centers)

Industries Catered

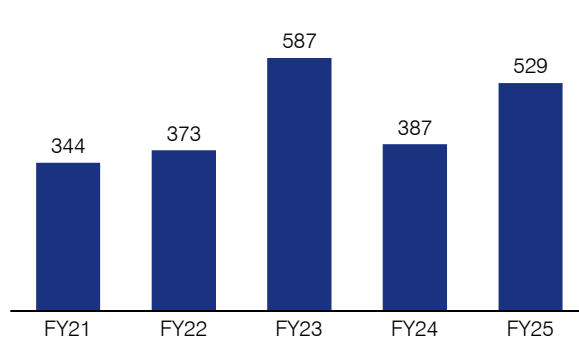
- Chemicals
- Mining
- Municipal Water Supply
- Power
- Commercial Building Services (Fire & HVAC)

Geographies Catered

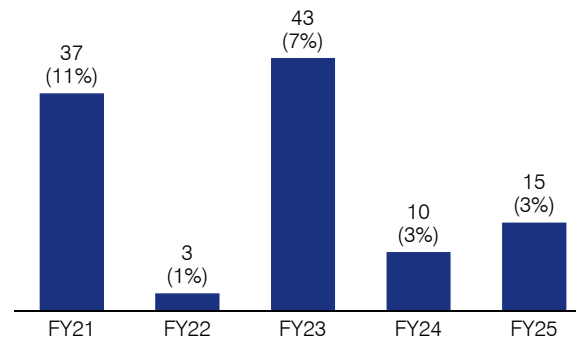
- Thailand
- Singapore
- Malaysia
- Cambodia
- Laos
- Philippines
- Vietnam



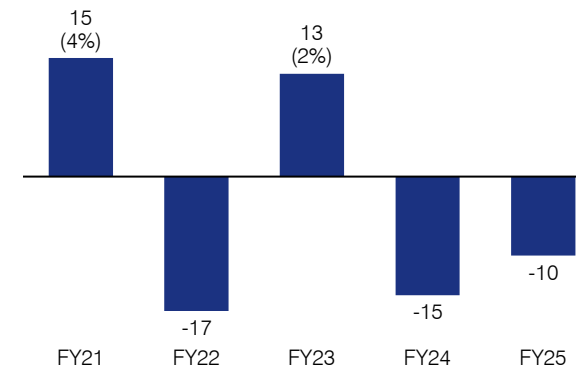
Revenue (TBH Mn.)



EBITDA (TBH Mn.) & EBITDA Margin (%)



PAT (TBH Mn.) & PAT Margin (%)



Strategy

- Access ASEAN region duty-free through value addition in Thailand
- Brand Development and distribution network expansion in ASEAN region
- Continue to reduce the lumpiness of the cashflows by focussing to build a standard and engineered daily business

Note : Including SPP Asia and SPP Singapore

This is a proprietary document of Kirloskar Brothers Limited

Braybar Pumps Limited, South Africa



Enriching Lives

Genesis

- Manufacturing and sales of high head multi-stage pumps, rubber lined slurry pumps and white metal lined bearings
- Successfully overcome BBBEE regulations and turned around the business by changing the business mix over the last three years.
- **Current Orderbook: ZAR 66 million**

Product Profile

- Fire fighting pumps
- Mine de-watering pumps
- Chemical pumps
- Water supply pumps
- Re-engineering services for all pumps
- Services (Field service and service centers)

Industries Catered

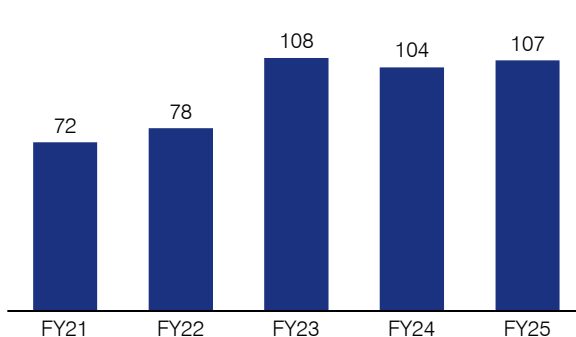
- Mining (Copper, Gold, Uranium)
- Water supply
- Chemicals
- Commercial Building Services (Fire & HVAC)

Geographies Catered

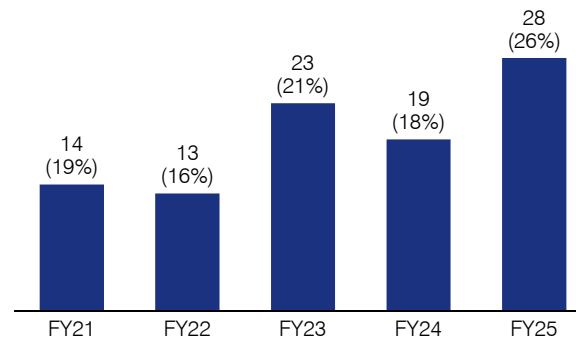
- South Africa
- Zambia
- Botswana
- Angola
- Mozambique
- Kenya
- Uganda
- Tanzania



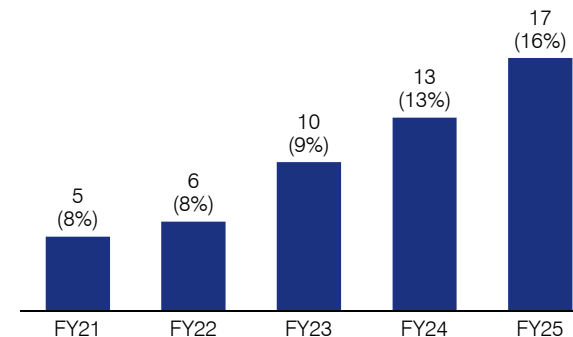
Revenue (ZAR Mn.)



EBITDA (ZAR Mn.) & EBITDA Margin (%)



PAT (ZAR Mn.) & PAT Margin (%)



Strategy

- Improve product mix
- Maintain profitability

Karad Projects And Motors Limited (KPML)



Enriching Lives

Genesis

- KPML is a wholly owned subsidiary of KBL.
- 3 manufacturing plants located at Karad, Maharashtra, India.
- Expertise in manufacturing Electrical Stampings, Stators, Rotors, Shaft, Rotor fitted shafts, AC rotating machines, Mini water handling pumps, Connecting Rods and Drive Units
- **Current Orderbook: Rs. 40 Crores**

Product Profile

- **Stamping:** Electrical Stampings, Core packs, Wound Stators, Die Cast Rotors, Copper Brazed Rotors, Rotor Fitted Shafts, etc.
- **Motors:** 3 Phase AC induction Motors (incl. IE4, IE5), Elevator Motors, Submersible Pump - Stators -Rotor fitted shaft, Stators ,Domestic water handling pumps, etc.
- **Components:** Drive Units for Pumps & Connecting Rods for ACR industry, Components for auto priming system (Priming tank & Coalescer)

Industries Catered

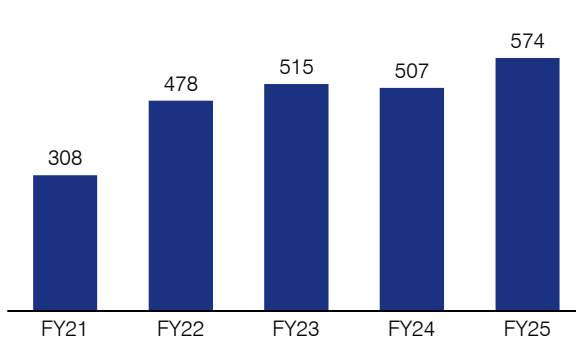
- Pumps
- Hermetic Compressors
- Healthcare
- Elevator

Geographies Catered

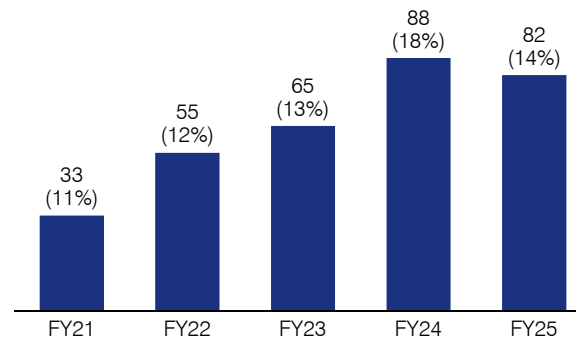
- India
- Austria
- Germany
- France
- USA
- Mexico
- China
- Spain
- UK



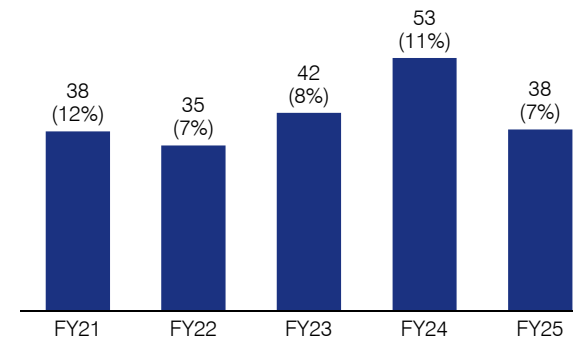
Revenue (Rs. Crs.)



EBITDA (Rs. Crs.) & EBITDA Margin (%)



PAT (Rs. Crs.) & PAT Margin (%)



Strategy

- Cost Leadership through Backward Integration
- Product expansion – Electronics, Smart Systems and Products

Kirloskar Ebara Pumps Limited



Enriching Lives

Genesis

- JV in 1988 between KBL and Ebara Corporation to manufacture and supply rotary equipment like process pumps, boiler feed water pumps, steam turbines for mechanical drive and steam turbine generators, etc. required for critical applications in hydrocarbon processing industries and power projects
- **Current Orderbook: Rs. 316 Crores**

Product Profile

- **Pumps:** Centrifugal pumps as per API 610, Multistage Boiler feedwater pumps
- **Turbines:** API 611 Steam turbines, Non-API Saturated Steam Turbine, Hydraulic Power Recovery Turbine (HPRT)

Industries Catered

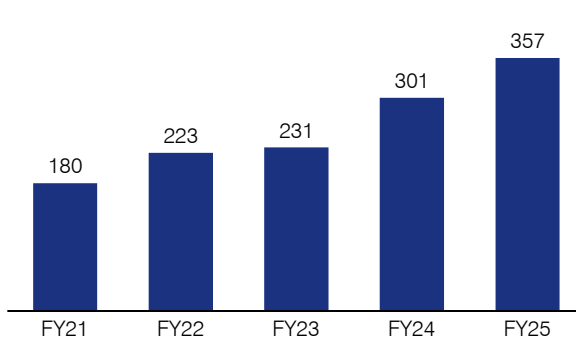
- Oil & Gas (Downstream – Refinery, Pipelines and Depots)
- LPG and LNG Bottling Plants
- Fertilizers
- Power
- Nuclear Energy
- Cogen Power Plants

Geographies Catered

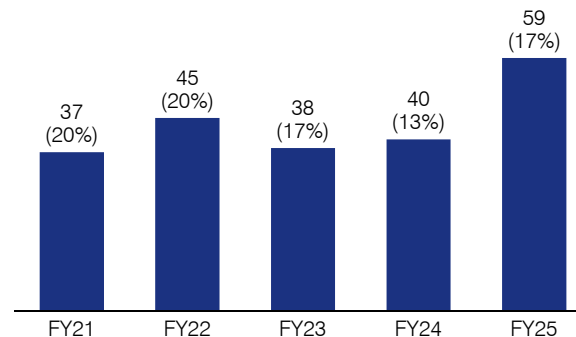
- Indian Subcontinent
- Europe
- CIS Countries
- South-East Asia
- Middle-East



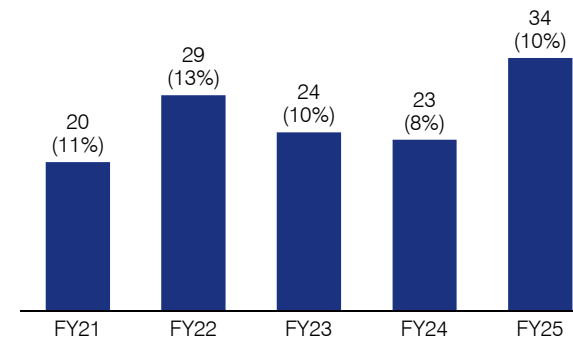
Revenue (Rs. Crs.)



EBITDA (Rs. Crs.) & EBITDA Margin (%)



PAT (Rs. Crs.) & PAT Margin (%)



Strategy

- Expand Services offering across the geographies catered
- Leverage proven track record and approvals with customers to increase the market share
- Improve margin profile and profitability through cost leadership
- Maintain the robust order book trajectory

The Kolhapur Steel Limited (TKSL)*



Enriching Lives

Genesis

- Established in the year 1965.
- TKSL is a wholly owned subsidiary of KPML
- Steel castings in the weight range of 300 kg-10 tonne single piece casting
- State-of-the-art facility with IBR and NORSOK certifications
- Installed Capacity: 3,600 MTPA
- Current Orderbook: Rs. 36 Crores

Product Profile

High Grade Steel Alloy Castings for

- Pumps
- Steel Turbines
- Hydro Turbines
- Valves
- General Engineering

Industries Catered

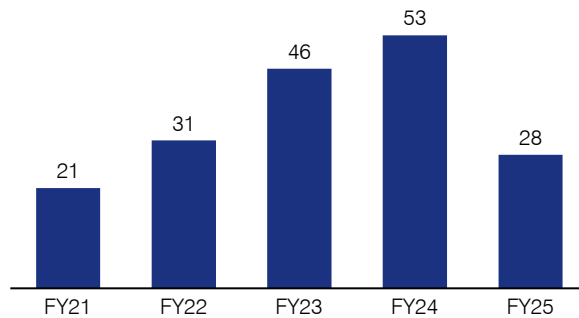
- Turbomachines
- Shipping & Heavy Engineering
- Earthmoving
- Mining
- Power

Geographies Catered

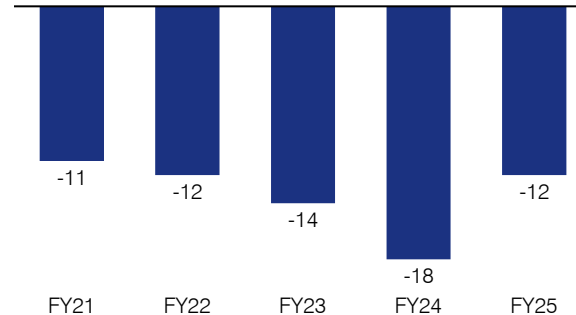
- India
- South Korea



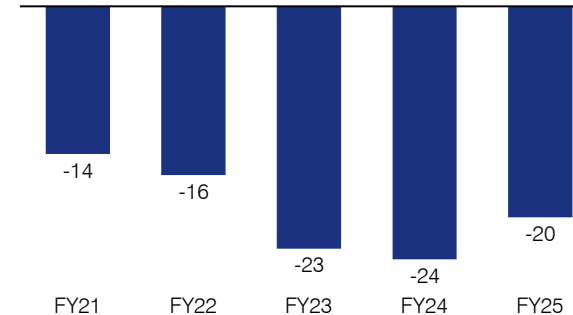
Revenue (Rs. Crs.)



EBITDA (Rs. Crs.)



PAT (Rs. Crs.)



Strategy

- Reduce the losses
- Enhance the operations through recently infused capital

* Sale of the Company's entire stake in TKSL, a 'non-material wholly owned subsidiary' to KPML has been completed on 1st October 2024

Kirloskar Corrocoat Private Limited



Enriching Lives

Genesis

- JV between KBL and Corrocoat Ltd. U.K. Company manufactures glass flake polymer coatings at its state-of-the-art plant at Kirloskarvadi, Maharashtra.
- Undertakes turnkey projects for supply and application of energy enhancing and anti-corrosion and anti-erosion coatings on pumps, valves, pipelines and other equipment
- **Current Orderbook: Rs. 72 Crores**

Product Profile

Anti Corrosion Coating Materials :

Corroglass - High performance engineering glass flake filled composites

Corrocoat - A range of tailor-made, high performance polymeric solutions for critical service applications

Plasmet - High performance, abrasion-resistant protective coatings and surface-tolerant primers.

Fluiglide - Energy efficiency coatings

Industries Catered

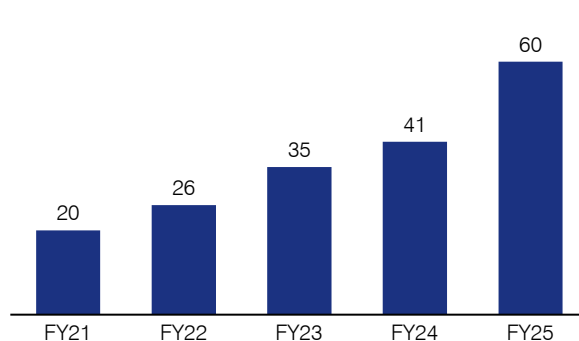
- Oil & Gas
- Petrochemicals
- Power
- Steel
- Water
- Waste Management

Geographies Catered

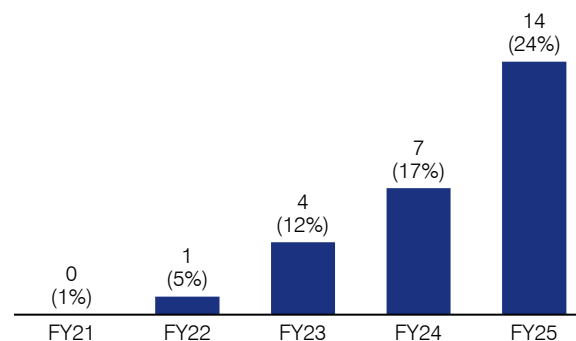
- Pump and Valve Users
- Oil Refineries
- Power plants



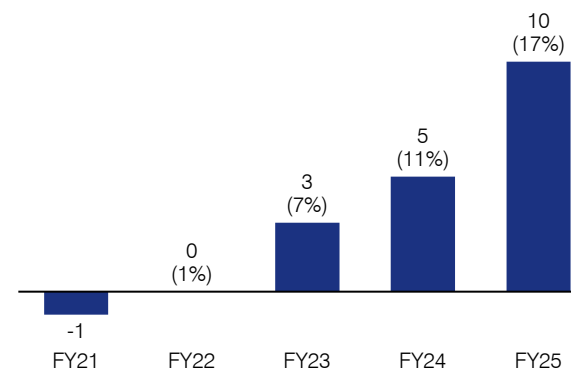
Revenue (Rs. Crs.)



EBITDA (Rs. Crs.)



PAT (Rs. Crs.)



Strategy

- Product Differentiation – Provide innovative solutions to the customers to enhance efficiency and life of pumps valves and pipelines
- Developed unique solution to remain ahead of the curve- Innovative product range for Power Sector supported by FGD Regulation and marine anti-corrosion applications

* Sale of the Company's entire stake in TKSL, a 'non-material wholly owned subsidiary' to KPML has been completed on 1st October 2024

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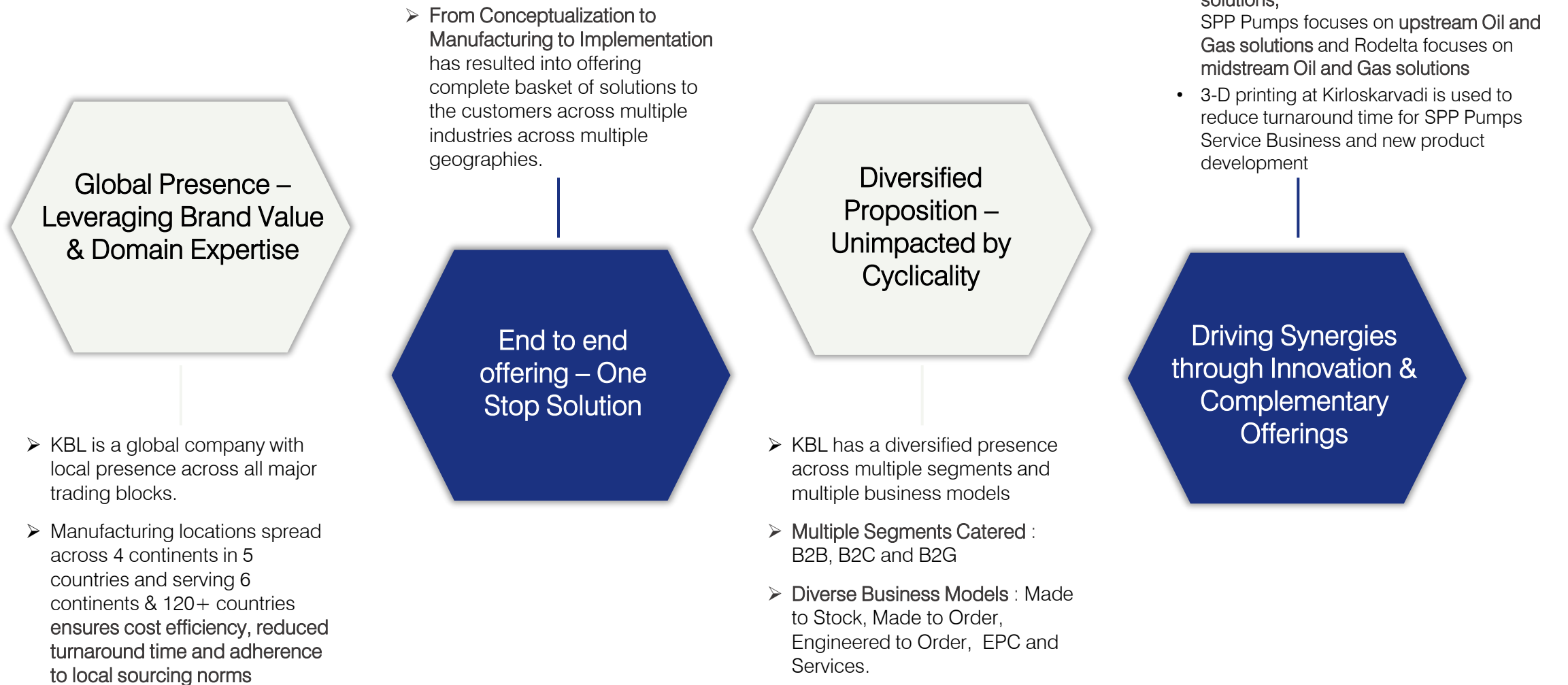
Strategic Focus



A Unique Value Proposition



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Staying Ahead of the Curve through Digital Initiatives



Enriching Lives

- Over a decade, KBL has strategically invested in various strategic digital initiatives
- Provides Technological Advantage and additional revenue streams in services business
- Salesforce (SFDC) and SAP-S4 HANA for Automation and ERP Solutions



3D Printing

- World's Largest 3-D printer for foundries installed in 2013 at Kirloskar Vadi Plant
- Contributes significantly towards faster turnaround time in preparing the molds and cores for casting of pump components. Pumps are used for domestic and export applications.
- Flexible and Universal - Supports competitor's pumps and products for retro-fitment and reengineering



AR/ VR

- Used for training the employees and customers
- Consistent service delivery by documenting knowledge of service engineers over a decade & ensuring this knowledge is the IP of KBL



AI-ML

- Dolphin – Proprietary Machine Learning Algorithm
- Analysis automation based on historical and live data – Higher uptime and lowered catastrophic failure for customers



IoT

- Remote multiple pump monitoring and diagnostics tool – Accessible through smartphones and computers , helps in spare parts management
- IoT enables manufacturing across domestic plants
- Launched KirloSmart™ 2.0 and Kirlo Smart™ 2.1 advanced version of IoT-based solution

Leading digital transformation in India's Pump Industry

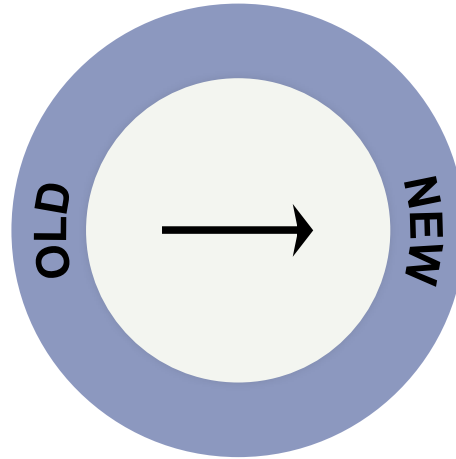
Subscription Platform - Creating Market Opportunity



Enriching Lives

Traditional Solution

- Manage customer site, refurbish, repair & upgrade all pumps in phased manner
- Periodic site visits resulting to higher manpower required
- Difficult to scale-up the offering
- Higher turnaround time



KBL's Innovative Solution - Subscription Platform

- Proprietary Innovative Solution by KBL
- Remote failure prediction analytics, troubleshooting and monitoring
- Lower turnaround time
- No periodic site visits required.
- Higher uptime, lower catastrophic failures and spare part inventory carrying costs to the customer
- Highly scalable with less manpower requirement

Leading to New Market Opportunities

➤ Scalable & Universal:

- The proprietary algorithm keeps on improving on a live basis
- With easy scalability, product can be scaled across geographies

➤ Multiple Revenue Streams:

- Subscription fees (recurring service revenue without additional costs) and product revenue on repairs, upgrades and maintenance.
- Potential to convert all the existing AMC and Framework contracts into subscription platform



Strategy Going Forward

Focus on Value-Added Products & Services



Increase share of **value-added products** across geographies and **subscription services** in key international subsidiaries

Monetize IPs



Out of **27 patents** applied, **19 patents** awarded (**2 USA valid patents**) **Monetize digital IP** acquired over years by expanding contribution from services business & value-added products

Leverage Global Presence



Expand & deepen geographic presence by leveraging presence of international subsidiaries while complying to local sourcing norms

Debottlenecking & Cost Optimisation



Debottlenecking at key domestic subsidiaries
Cost optimization across subsidiaries

Strong Thrust on Quality & Product Innovation



R&D Centers experts having rich industry experience
8 new products have earned the India Design Mark in last 5 years

Change in Strategy

Reduced EPC business exposure and increased contribution from Services & Value-Added Products

- Reduced exposure in low margin, lumpy and WC intensive EPC orders since 2008
- Share of EPC to the revenue has come down drastically (**10% in FY20 to 3% in FY25**)
- Taking selective exposure in profitable contracts
- Very few old projects orders remain unexecuted
- Presence in Water, Power & Irrigation sectors without taking EPC exposure

Higher margins & profitability

Improved working capital cycle, lower lumpiness

Improved Cash Flows and Profitability, Consistent Revenue



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Historical Performance

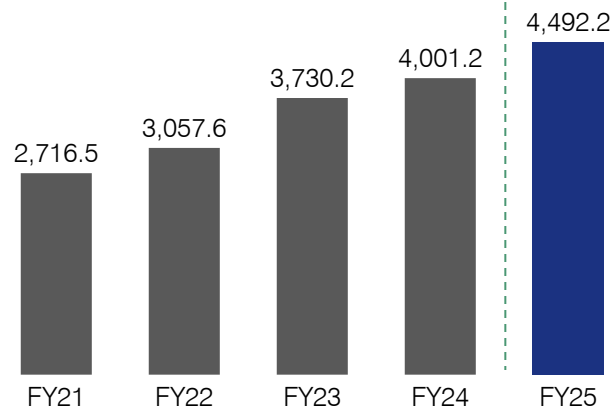


Historical Financial Performance - Consolidated

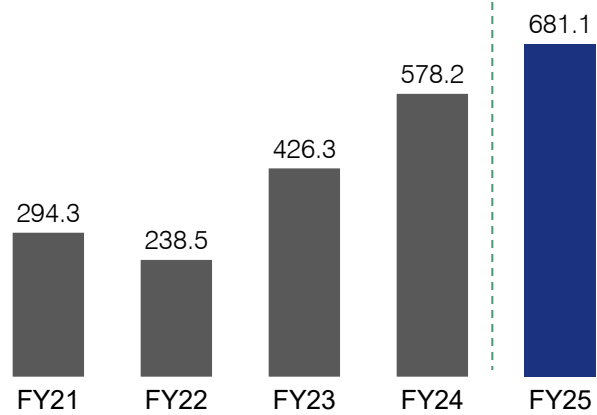


Enriching Lives

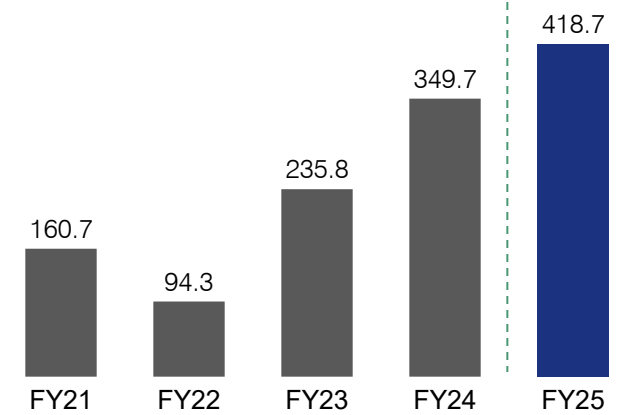
Revenue (Rs. Crores)



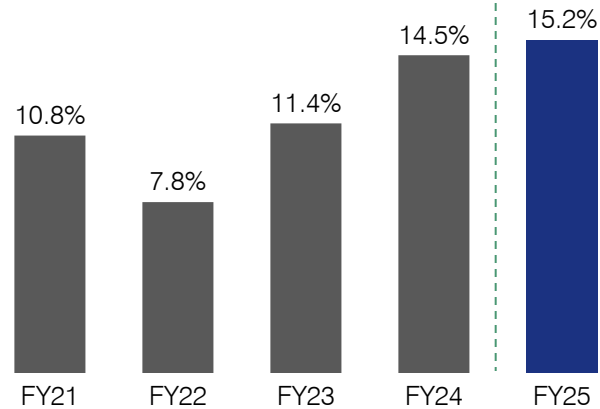
EBITDA (Rs. Crores)



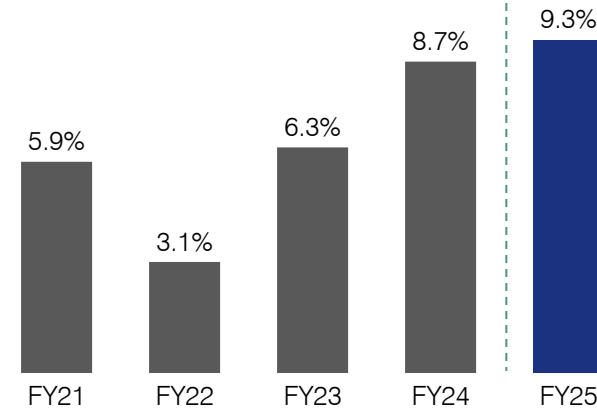
PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)

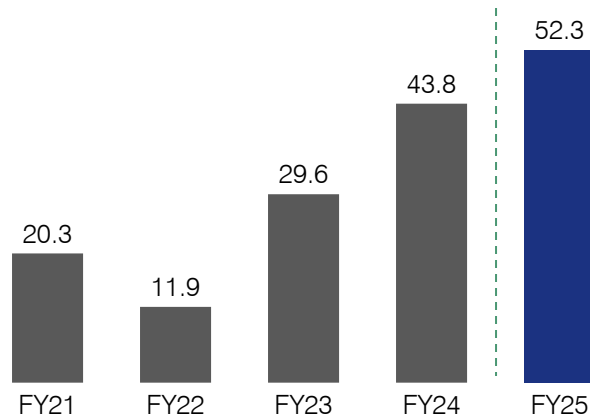


Historical Financial Performance - Consolidated

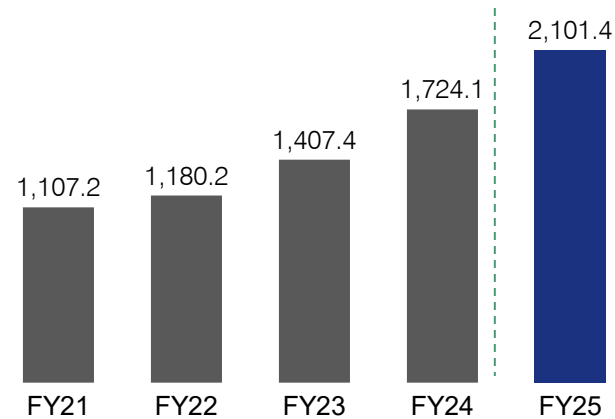


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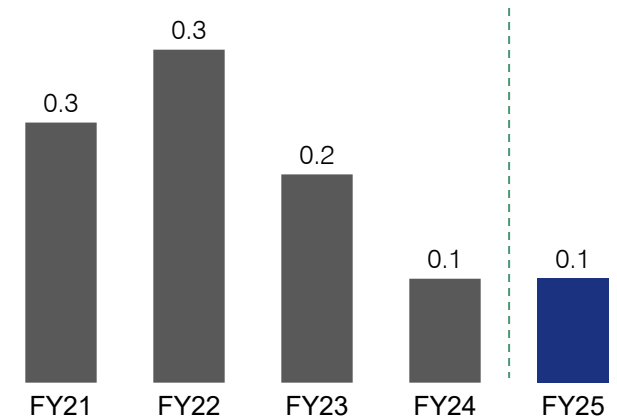
EPS (in Rs.)



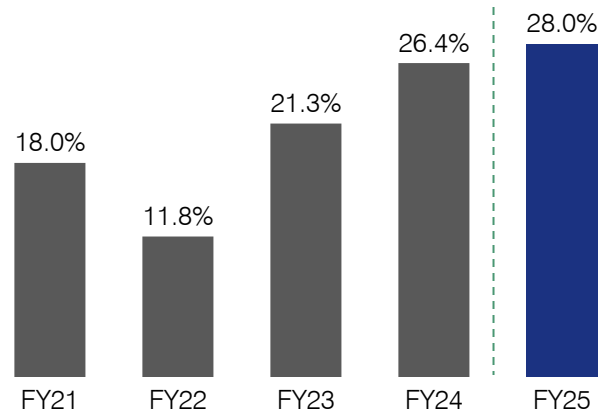
Net Worth (Rs. Crores)



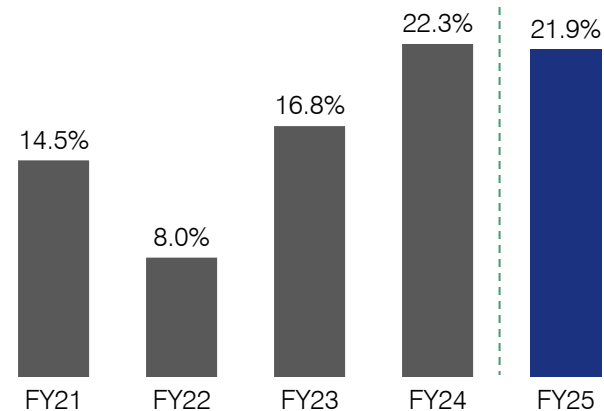
Leverage (X)



RoCE (%)



RoE(%)



Consolidated Profit & Loss Statement



Enriching Lives

Particulars (Rs. Crores)	FY21	FY22	FY23	FY24	FY25
Net Revenue from Operations (Net of Excise)	2,716.5	3,057.6	3,730.2	4,001.2	4,492.2
Other Income	53.8	32.4	27.3	58.6	71.9
Materials Consumed	1,449.5	1,680.3	1,954.7	1,983.0	2,197.8
Employee Expenses	488.8	501.5	565.2	672.7	707.9
Other Expenses	537.7	669.7	811.3	825.9	977.3
EBITDA	294.3	238.5	426.3	578.2	681.1
EBITDA Margin (%)¹	10.8%	7.8%	11.4%	14.5%	15.2%
Finance Costs	44.2	33.5	35.4	25.8	24.8
Depreciation	68.0	69.5	68.6	78.4	89.4
Exceptional Item	0.0	0.0	4.2	-6.6	7.8
Profit Before Tax (PBT)	182.1	135.5	318.1	480.6	559.1
Taxes	28.2	54.0	93.0	141.0	155.7
Profit After Tax (PAT)	153.9	81.5	225.1	339.6	403.4
Share in profit of joint venture company	6.8	12.8	10.7	10.1	15.3
PAT after profit of joint venture company	160.7	94.3	235.8	349.7	418.7
PAT Margin (%)¹	5.9%	3.1%	6.3%	8.7%	9.3%
Earnings Per Share (EPS)	20.3	11.9	29.6	43.8	52.3

¹ EBITDA & Reported PAT margin is % to Net Revenue from Operations

Consolidated Balance Sheet Statement



Enriching Lives

Particulars (Rs. Crores)	FY21	FY22	FY23	FY24	FY25
Non Current assets					
Property, Plant and Equipment	428.4	487.0	481.4	578.7	590.8
Capital work in progress	72.9	26.7	81.3	32.0	33.7
Intangible assets	5.4	3.7	4.8	4.1	7.9
Right to use assets	30.2	27.4	30.6	36.6	47.6
Goodwill	14.1	13.9	14.4	14.4	8.4
Investment Property	2.5	0.2	0.7	0.5	0.5
Financial Assets					
(i) Investments	68.0	79.7	88.5	111.5	268.0
(ii) Trade Receivables	59.6	39.0	57.4	60.8	87.5
(iii) Others	16.6	25.4	16.7	11.7	12.0
Deferred Tax Assets (net)	47.2	41.8	40.8	27.7	36.7
Other non-current assets	103.7	103.7	72.4	54.2	58.8
Total Non Current Assets	848.6	848.5	889.0	932.2	1,151.9
Current Assets					
Inventories	602.8	643.5	714.0	852.3	853.7
Financial Assets					
(i) Trade receivables	463.7	515.2	488.5	524.4	492.5
(ii) Cash and Cash Equivalents	173.5	134.1	221.3	265.9	323.1
(iii) Other Bank balances	1.9	29.8	31.6	26.9	25.6
(iv) Investments	126.8	253.4	226.7	298.3	350.8
Current Tax Assets(Net)	6.6	9.3	5.7	5.3	7.4
Other financial assets incl. Loans	100.2	86.7	103.5	102.1	114.8
Other current assets	390.5	341.8	335.5	317.3	345.6
Total Current Assets	1,866.0	2,013.8	2,126.8	2,392.5	2,513.5
Total Assets	2,714.6	2,862.3	3,015.8	3,324.7	3,665.4

Particulars (Rs. Crores)	FY21	FY22	FY23	FY24	FY25
Equity					
Equity Share capital	15.9	15.9	15.9	15.9	15.9
Other Equity	1,088.8	1,161.5	1,388.1	1,703.1	2,077.0
Non Controlling Interest	2.5	2.6	3.4	5.1	8.5
Total Equity	1,107.2	1,180.0	1,407.4	1,724.1	2,101.4
Financial liabilities					
(i) Borrowings	84.0	136.4	110.9	64.6	69.2
(ii) Other Financial liabilities	9.7	15.1	3.7	5.5	4.4
(iii) Trade Payables	9.0	7.5	8.0	8.3	8.3
Other non current Liability	21.5	68.8	85.2	80.5	93.5
Provisions	24.6	25.9	44.8	37.0	31.1
Total Non Current Liabilities	148.8	253.7	252.6	195.9	206.5
Financial liabilities					
(i) Borrowings	216.5	238.8	141.8	90.3	61.8
(ii) Trade Payables	549.8	591.1	601.8	663.1	603.7
(iii) Other financial liabilities	228.3	155.0	164.1	166.6	184.4
Provisions	55.3	74.0	83.9	77.6	83.0
Other current liabilities	408.7	369.7	358.2	401.9	415.5
Current tax liabilities (Net)	-	-	6.1	5.2	9.1
Total Current Liabilities	1,458.6	1,428.6	1,355.8	1,404.7	1,357.5
Total Equity and Liabilities	2,714.6	2,862.3	3,015.8	3,324.7	3,665.4

Consolidated Cash Flow Statement



Enriching Lives

Particulars (Rs. Crores)	FY21	FY22	FY23	FY24	FY25
Profit Before Taxes	182.1	135.5	318.1	480.6	559.1
Changes in working capital	170.1	18.8	81.3	20.4	-10.0
Cash generated from operations	352.2	154.3	399.4	501.0	549.1
Direct taxes paid (net of refund)	35.8	41.4	67.4	126.4	160.2
Net Cash from Operating Activities	316.4	112.9	332.0	374.6	388.9
Net Cash from Investing Activities	-143.9	-181.9	-75.6	-170.8	-239.8
Net Cash from Financing Activities	-315.3	29.8	-169.4	-159.2	-91.9
Net Increase in cash and cash equivalents	-142.8	-39.2	87.0	44.7	57.2
Add: Cash & Cash equivalents at the beginning of the period	317.0	173.5	134.3	221.3	265.9
Cash & Cash equivalents at the end of the period	174.2	134.3	221.3	266.0	323.1

Awards & Accolades



Enriching Lives



Dewas - Golden Peacock National Quality Award



Golden Peacock Award for Environment Management



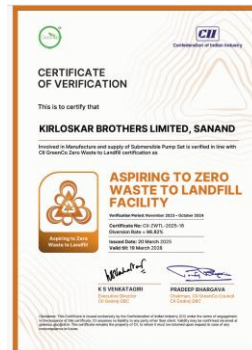
Dewas and KEPL- Received The Award For Excellence In Consistent TPM Commitment



SPP Pumps UK - Manufacturer of the Year at prestigious Pump Industry Award (PIA), marking 3rd consecutive win in 2023, 2024, and 2025.



Dewas- Received CII “Approaching to Zero Waste to Landfill” Award



Sanand- Received CII “Aspiring to Zero Waste to Landfill” Award



Received the prestigious GreenPro Ecolabel certification for 10 cm Submersible Pumpset



Received the prestigious GreenPro Ecolabel certification for 0.5 and 1.0 HP mini pump series



Environmental

- Enhancement of renewable energy- power purchase agreement for 13.5 Kwh open access solar
- Enhanced energy performance of 437 pumps with BEE 4-star and 5-star rating
- 41% Water recycled
- Use recycled products as raw material inputs, negligible plastic consumption and plastic waste
- Scope 1,2 3 inventorisation
- 35% reduction in Scope 1 emissions
- Dewas plant achieved "Approaching to Zero Waste to Landfill" certification from CII whereas Sanand plant achieved "Aspiring to Zero Waste to Landfill" certification from CII
- Suppliers engagement with on environmental issues
- Mass tree plantation drives



Social

- Vikas Charitable Trust established in 1994
- CSR activities revolves around Education, Employment, Healthcare, Animal Welfare, Re-skilling War Veterans and Women Empowerment
- Improve lives of community where we operate
- Social impact initiatives are measured by a third party
- Employee Welfare: Multi-pronged approach towards employee development.
- Focused on all aspects of diversity in workforce be it Gender, Regional or through Affirmative actions. No discrimination made during hiring process irrespective of the position's location, level or type of work
- 43% sustainable sourcing
- 62.93% Business spend of value chain partners covered under ESG assessment



Governance

- Sustainability reporting since 2009-10 and integrated reporting since 2018-19
- Corporate sustainability committee drive ESG initiatives across KBL Group of Companies
- Mandatory Code of ethics examination taken by all the employees every year.
- The Board has an optimum combination of Executive and Non-Executive directors and gender diversification
- Risk Management Governance
- ESG policies
- Regular review and updation of policies in response to the changing requirements
- GDPR Compliant

Examples of our CSR activities in India

- Supporting creation of clean water source for underprivileged school kids
- Health-check, eye-check camps and Vaccination camps
- Tree Plantation
- Self-employment awareness campaign amongst unemployed youths
- Provision & Up-gradation of education facilities for underprivileged school kids
- Provided support to HIV prevention program
- Provided support to Forest Rangers Wildlife Trust of India
- Save girl-child campaigns and Sponsoring foods for orphaned kids
- Awareness campaign for young farmers relating cultivating & cattle breeding best practices

Examples of our CSR activities outside India

- SPP Pumps recognized as one of UK's best Apprenticeship Employers in the regional final of the National Apprenticeship Awards 2013
- Listed in England's top 100 apprenticeship employers by City & Guilds and the National Apprenticeship service
- Working with hospice and foodbanks in the UK around our manufacturing facilities to ensure food availability throughout the year
- Work with the Hero's First Foundation in the USA to raise money for war veterans of the Iraq and Afghanistan campaigns which is donated to hospitals and skill building institutions
- Sponsor skill building programs in the Republic of South Africa

Shaping Tomorrow: A Commitment to CSR



Enriching Lives

All-women operated manufacturing facility in Kaniyur & 35% women workforce in Sanand factory is testimony towards gender equality and women empowerment



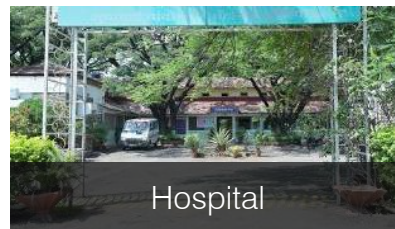
KBL conducts an array of activities and campaigns throughout the year. The company focuses on three areas for its CSR contributions Education, Healthcare, and Environment through the Vikas Charitable trust and Sou. Radhabai Trust



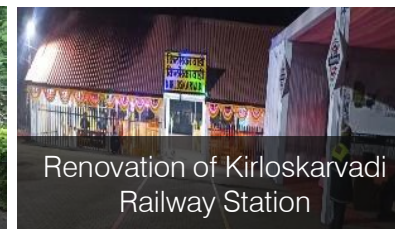
Biodiversity Project



Kirloskar High School



Hospital



Renovation of Kirloskarvadi
Railway Station



Special Bus Donation to
Rashtriya Lifesaving
Society (India)



Skill Training Program



Thank you

Company

Investor Relations Advisor



Enriching Lives

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Established 1888

A Kirloskar Group Company

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