



एनएचपीसी लिमिटेड
(भारत सरकार का उद्यम)

NHPC Limited
(A Govt. of India Enterprise)

फोन/Phone: 0129-2278018

दिनांक/Date: 12.07.2023

संदर्भ सं./Ref. No. NH/CS/199

Manager/ मैनेजर, Listing Department/ लिस्टिंग विभाग, M/s BSE Limited/ बीएसई लिमिटेड, Phiroze Jeejeebhoy Towers / फिरोज जीजीभोय टावर्स, Dalal Street, /दलाल स्ट्रीट, Mumbai/ मुंबई -400 001 Scrip Code: 533098	General Manager/ महाप्रबंधक, Listing Department/ लिस्टिंग विभाग, M/s National Stock Exchange of India Limited/ नेशनल स्टॉक एक्सचेंज ऑफ इंडिया लिमिटेड, Exchange Plaza, / एक्सचेंज प्लाजा, Bandra Kurla Complex/ बांद्रा कुर्ला कॉम्प्लेक्स, Bandra (E)/ बांद्रा (ई), Mumbai/ मुंबई - 400 051 Scrip Code: NHPC
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ISIN No. INE848E01016

Sub: Intimation of schedule of institutional investors meet

विषय: संस्थागत निवेशकों की बैठक के कार्यक्रम की सूचना

Sirs/महोदय,

In compliance to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, it is to inform that NHPC Limited will participate in non-deal road shows and meet institutional investors on 13th & 14th July, 2023 in Mumbai. A copy of the corporate presentation for the non-deal road show is enclosed herewith.

No unpublished price sensitive information is proposed to be shared during the meeting(s).

This is for your record and information.

सेबी (लिस्टिंग दायित्वों और प्रकटीकरण आवश्यकताओं) विनियमन, 2015 के विनियम 30 के अनुपालन में यह सूचित किया जाता है कि एनएचपीसी लिमिटेड गैर-डील रोड शो में भाग लेगी और 13 एवं 14 जुलाई, 2023 को मुंबई में संस्थागत निवेशकों से मुलाकात करेगी। गैर-डील रोड शो के लिए कॉर्पोरेट प्रस्तुति की एक प्रति इसके साथ संलग्न है।

मीटिंग के दौरान कोई भी अप्रकाशित मूल्य संवेदनशील जानकारी साझा करने का प्रस्ताव नहीं है।

यह आपके रिकॉर्ड और जानकारी के लिए है।

धन्यवाद।

भवदीय

संलग्न: उपरोक्तानुसार

(रूपा देब)
कंपनी सचिव



Clean Power For Every Home



INVESTOR PRESENTATION JULY 2023



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- All figures mentioned are for the Company on standalone basis and are as of March 31, 2023, unless indicated otherwise.
- FY means the Financial Year starting April 1 and ending March 31
- 1 Crore = 10 Million = 100 Lakh

Presentation Outline

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NHPC Today

Financial Highlights

Financial Ratios

Renewable Energy

Projects At Glance

Industry Overview

Investment Highlights



Our Vision: To be a global leading organization for sustainable development of clean power through competent, responsible and innovative values.

Subansiri Lower Project



Teesta V, Sikkim



PHYSICAL SNAPSHOT

Installed Capacity

- ❖ Power Stations under Operation- 22 Nos. (5,551 MW*)
- ❖ Power Stations with Subsidiary (NHDC) - 2 Nos. (1,520 MW)
- ❖ Total Operational Projects – 24 Nos. (7,071 MW)

Under Construction

- ❖ Projects Under Construction (including Subsidiary & JV) :-
 - Hydro & Solar - 16 Nos. (10,515 MW)

Awaiting Clearances

- ❖ Projects Awaiting Clearances : -
 - Standalone - 4 Nos. (3,116 MW)
 - Subsidiary – 2 Nos. (996 MW)

Under Survey & Investigation

- ❖ Projects under Survey & Investigation - 2 Nos. (890 MW)

Hydro Power is 11% (46,850 MW) of All India Installed Capacity (4,16,059 MW**).

NHPC Contribution is 15% of Installed Hydro Power On Consolidated Basis.

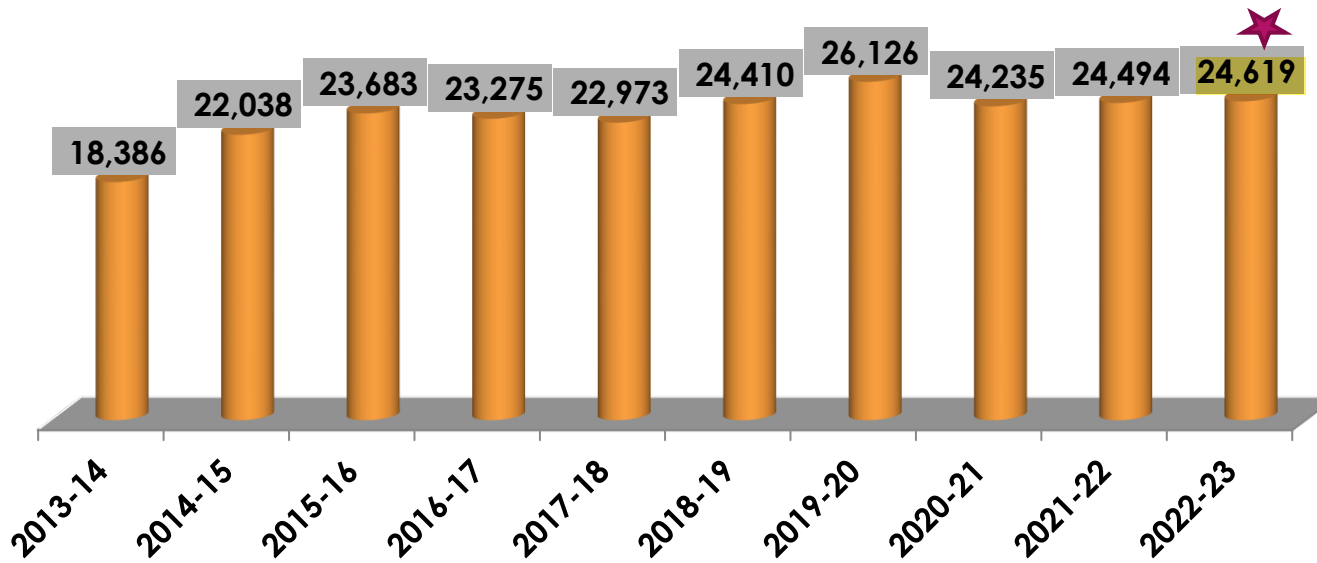
Status	Capacity (MW)
Operational Projects	7,071
Projects Under Construction (including Subsidiary & JV)	10,515
Projects Under Clearance:	
Stand alone	3,116
Subsidiaries	996
Projects Under Survey & Investigation	890
Total	22,588

* Including 50 MW Wind Power Project, Jaisalmer & 50 MW Solar Power Project, Tamilnadu.

** Source-CEA as on 31.03.2023

NHPC 's Track Record – A Ten Year Digest

Standalone Generation (in M.U.)



Actual FY'23

Actual FY'22

• Country Generation
1,421 BU

• Country Generation
1,321 BU

• Share of Hydro Power
162 BU (11%)

• Share of Hydro Power
152 BU (12%)

• Share of NHPC (Hydro) Standalone
24,452 MU (15%)

• Share of NHPC (Hydro) Standalone
24,329 MU (16%)

★ Hydro: 24,452 MU(excl. infirm power of 288 MUs : Parbati II), Wind: 77 MU & Solar: 90 MU.

Financial Highlights

Sewa II, UT of J&K



Chamera I, Himachal



Clean Power For Every Home

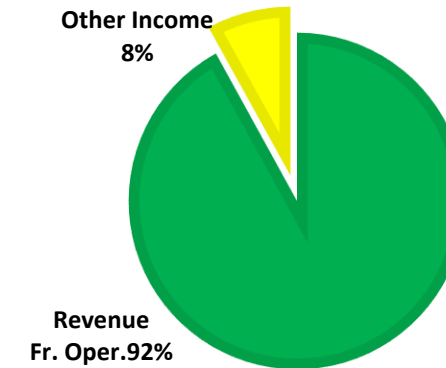
Financial Highlights : Standalone

Rs. In Crore

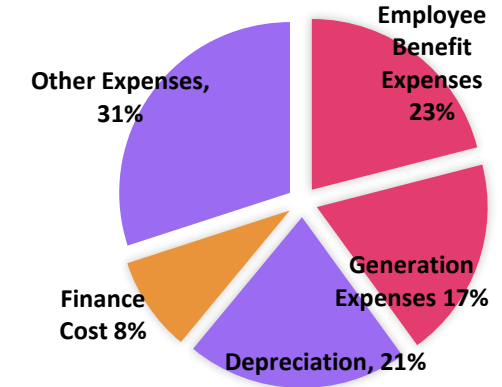
Particulars	FY'23		FY'22		% Change	
	12 Months	Qtr-4	12 Months	Qtr-4	12 Months	Qtr-4
Revenue from Operation	9,316	1,717	8,309	1,506	12.1	14.1
Other Income	835	254	1,026	502	(18.7)	(49.4)
Total Income (A)	10,151	1,971	9,335	2,007	8.7	(1.8)
Generation Expenses	936	152	841	134	11.3	13.4
Employee Benefits Expense	1,301	417	1,441	498	(9.7)	(16.3)
Finance Cost	476	112	532	133	(10.5)	(15.7)
Depre. & Amort. Expense	1,145	286	1,126	280	1.7	2.1
Other Expenses	1,708	486	1,349	450	26.7	8.2
Total Expenditure(B)	5,567	1,454	5,289	1,496	5.3	(2.8)
PBT(Before RRA)(C=A-B)	4,584	517	4,047	512	13.3	1.1
Rate Regu. Income (D)	(144)	216	(1,270)	74	(88.6)	189.8
PBT (After RRA) (E=C+D)	4,439	733	2,776	586	59.9	25.0
Tax (F)	605	163	(761)	26	(179.5)	522.4
Profit After Tax (G=E-F)	3,834	569	3,538	560	8.4	1.7

Revenue & Expenditure-Analysis

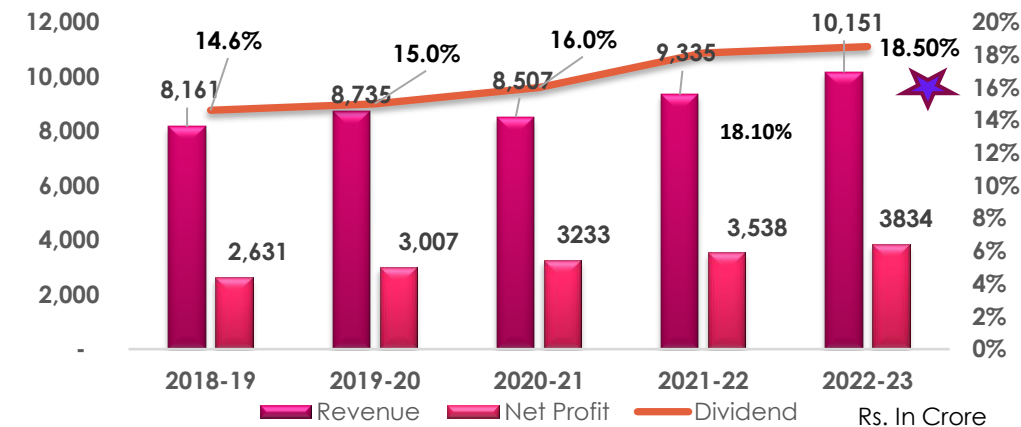
Revenue FY'23



Expenditure FY'23



Revenue Vs. Net Profit Vs. Dividend



★ Interim Dividend – 14.00% & Final Dividend 4.50%.

Statement of Assets & Liabilities

Rs. In Crore



Equity and Liabilities	FY'23	FY'22
Share Holder's Funds	35,408	33,486
Loan Funds-Long Term	25,266	23,179
Deferred Tax Liabilities	1,937	2,101
Other Long term Liabilities & Provisions	4,139	4,162
Current Liabilities & Provisions	7,042	6,058
Regulatory Deferral Account Credit Balances	923	1,313
Total Equity & Liabilities	74,715	70,300
Assets		
PPE (incl. investment property)	17,440	19,029
Capital Work in Progress	25,315	20,574
Right of Use Assets	2,626	1,783
Intangible Asset	3	3
Non Current Financial Asset	11,583	10,935
Non Current Assets (Others)	3,633	3,763
Regulatory Asset	6,420	6,948
Trade Receivables	5,488	4,621
Cash and Bank Balances	638	1,161
Current Assets (Others)	1,570	1,482
Total Assets	74,715	70,300

Debtors Position

Rs. In Crore



Total Debtors (in Crs.)

S. N.	Particulars	As on 31.03.2023	As on 31.12.2022	As on 30.09.2022	As on 30.06.2022	As on 31.03.2022
1	Trade Receivables	5,887 (including unbilled debtors of Rs. 2,757 Crs.)	5,819 (including unbilled debtors of Rs. 2,717 Crs.)	5,854 (including unbilled debtors of Rs. 2,751 Crs.)	5,488 (including unbilled debtors of Rs. 2,139 Crs.)	4,621 (including unbilled debtors of Rs. 1,961 Crs.)
2	More than 45 days*	168	229	113	1,326	1,024

* Net of Provision

Top Five Debtors* (in Crs.)

Name	31.03.2023		31.03.2022	
	Total	More than 45 days	Total	More than 45 days
PDD, J&K (Incl. JKPCL)	1,855	5	1,393	931
UPPCL, UP	1,543	0	1,146	0
PSPCL, Punjab	471	23	452	5
WBSEDCL	412	0	640	0
JdVVNL	244	91	100	63

Incentives Position

Comparative Incentive YoY (in Crs.)

Sl.	Particulars	FY22-23					FY21-22				
		Q-1	Q-2	Q-3	Q-4	Total	Q-1	Q-2	Q-3	Q-4	Total
1	Secondary Energy	-	-	14	110	123	-	-	13	125	138
2	Incentives	171	181	92	(40)	405	125	187	89	22	424
3	Deviation Chrgs.	72	47	29	(2)	147	38	47	45	60	190
	G. Total	244	228	135	68	675	163	235	147	207	752
4	PAF	98.6%	99.9%	88.3%	68.0%	88.8%	92.5%	99.0%	84.5%	76.8%	88.2%

Supplements

Power Station With Highest PAF Incentive : Salal (Rs. 82 Cr. PAF : 90.05%, NAPAF : 64%)

Power Station with highest Deviation Charges: Salal (Rs. 40 Cr.)

Power Station Giving Best Generation : Uri-II (140% of the annual design energy)

Supplements

Power Station with Highest PBT- Dulhasti (Rs. 621 Crs)

NHPC Profit per MW: Rs. 69 lakhs (FY'23), Rs. 64 lakhs (FY'22)

NHPC Profit per Employee: Rs. 80 lakhs (FY'23), Rs. 69 lakhs (FY'22)

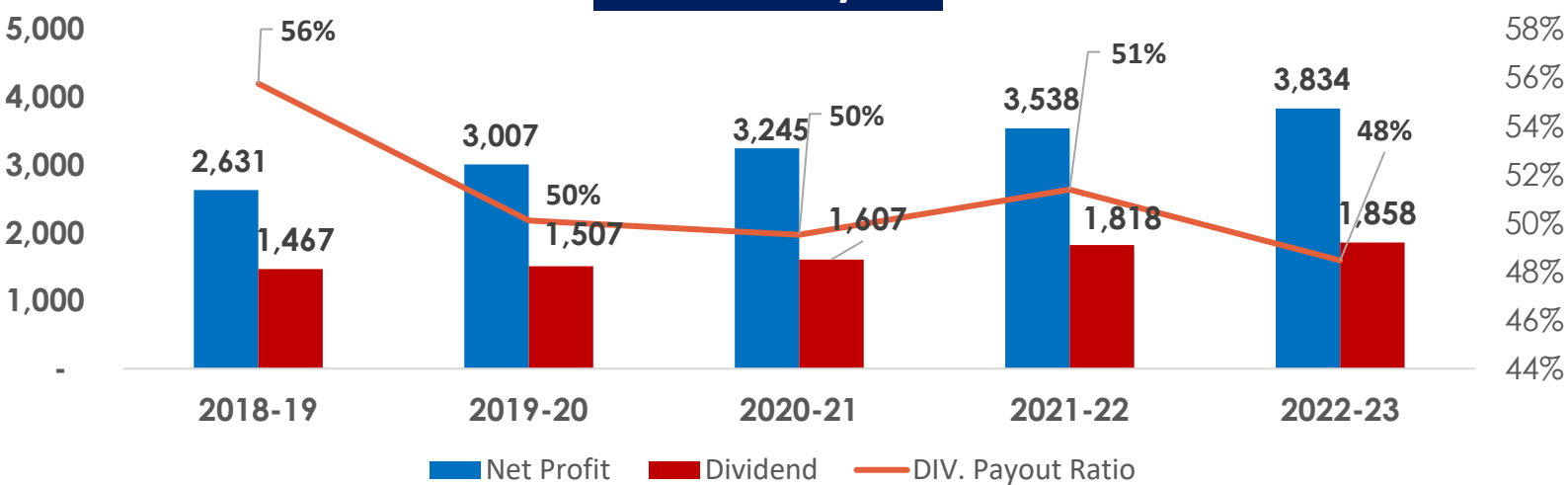
Key Financials : FY'23

Rs. In Crore

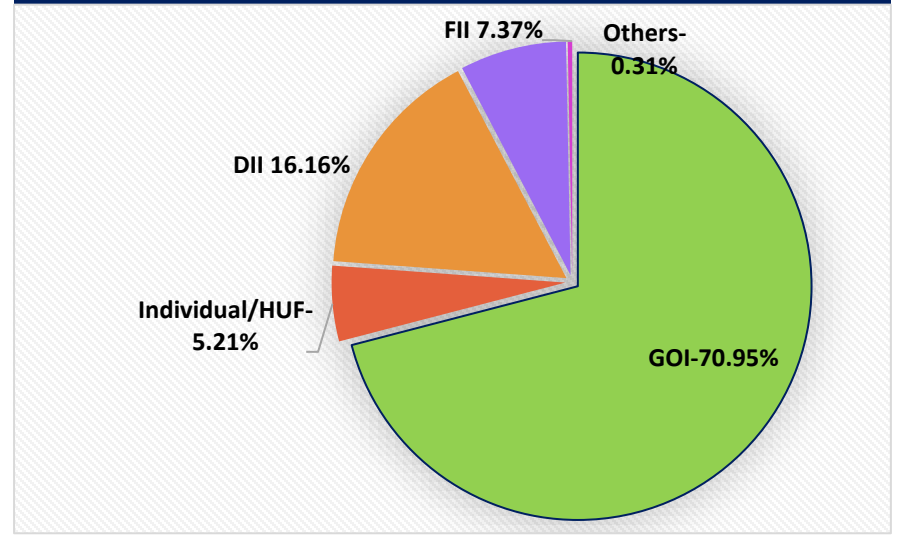
P&L	Standalone
Total Income	10,151
EBITDA	5,743
EBITDA Margin	57%
PAT	3,834
Profit Margin	38%
Dividend Pay Out (FY'23)	Rs. 1.85 Per Share/ 48% of Profit

Balance Sheet	Standalone
Share Capital	10,045
Net worth	35,408
Long Term Debt	25,266
Cash & Bank Bal.	638
Gross Block	40,117
CWIP	25,315

Dividend Pay out



Shareholding pattern as on 31.03.2023



NHPC – Key Ratios

S. No.	Particulars	FY'23		FY'22	
		Standalone	Consolidated	Standalone	Consolidated
1.	PAT (Rs. in Cr.)	3,834	3,890	3,538	3,524
2.	Net-worth (Rs. in Cr.)	35,408	36,899	33,486	34,921
3.	No. of Equity Shares (In Cr.)	1,005	1,005	1,005	1,005
4.	EPS (Rs.)	3.82	3.87	3.52	3.51
5.	Earning Yield(%)*	8.9	9.0	12.7	12.6
6.	Dividend Per Share (Rs.)	1.85		1.81	
7.	Dividend Yield(%)*	4.3		6.5	
8.	Book Value per share (Rs.)	35.25	36.73	33.34	34.76
9.	PB Ratio*	1.2	1.2	0.8	0.80
10.	PE Ratio*	11.2	13.3	7.9	7.9
11.	Return On Net worth (%)	10.8	10.5	10.6	10.1
12.	Market Capitalisation (Rs. in Cr.)*	43,153		27,925	
13.	Debt Equity Ratio	0.9	0.9	0.8	0.8

*Stock Price (BSE): as on 26.05.2023 Rs. 42.96 & as on 31.03.2022 Rs. 27.80.

NHDC Ltd. (Subsidiary) – Snapshots : FY 22-23

Shareholding Pattern : 51:49 (NHPC : GoMP)

Installed Capacity : 1,520 MW

Design Energy : 2,160 MUs

Generation : 5,444 MUs (FY'23), 2,645 MUs (FY'22)

PAF : 97.42% (FY'23), 92.74% (FY'22)

Revenue from operations : Rs. 1,318 Crs. (FY'23), 858 Crs. (FY'22)

PAT : 774 Crs. (FY'23), 513 Crs. (FY'22)

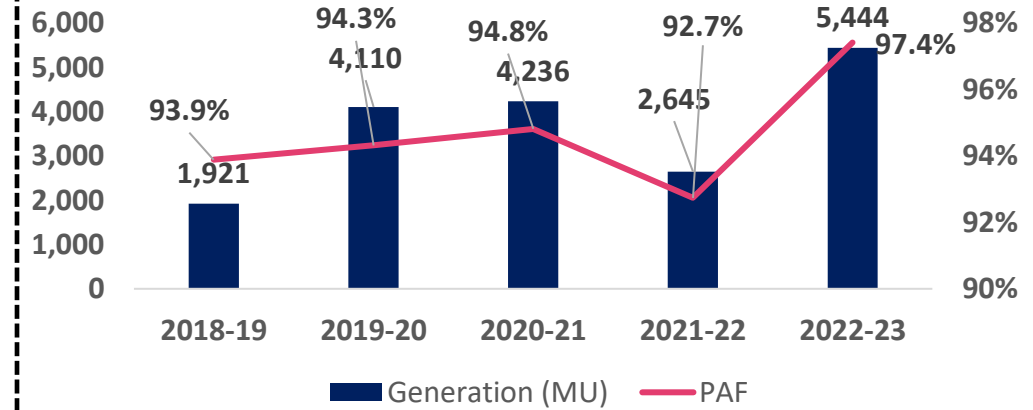
PAF Incentive : Rs. 46 Crs. (FY'23), Rs. 23 Crs. (FY'22)

Secondary Energy : Rs. 386 Crs. (FY'23), 56 Crs. (FY'22)

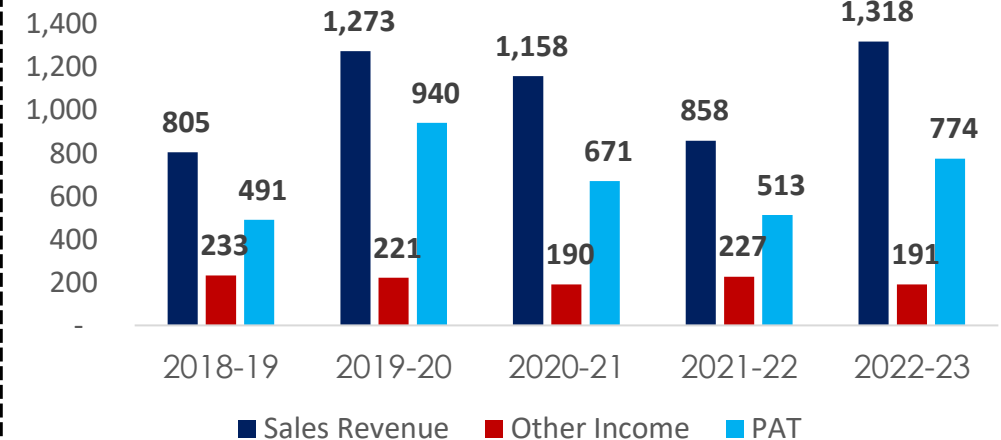
Deviation Charges: Rs. 18 Crs. (FY'23), 7 Crs. (FY'22)

Regulated Equity: Rs. 2,022 Crs. (FY 2022-23)

Physical Performance

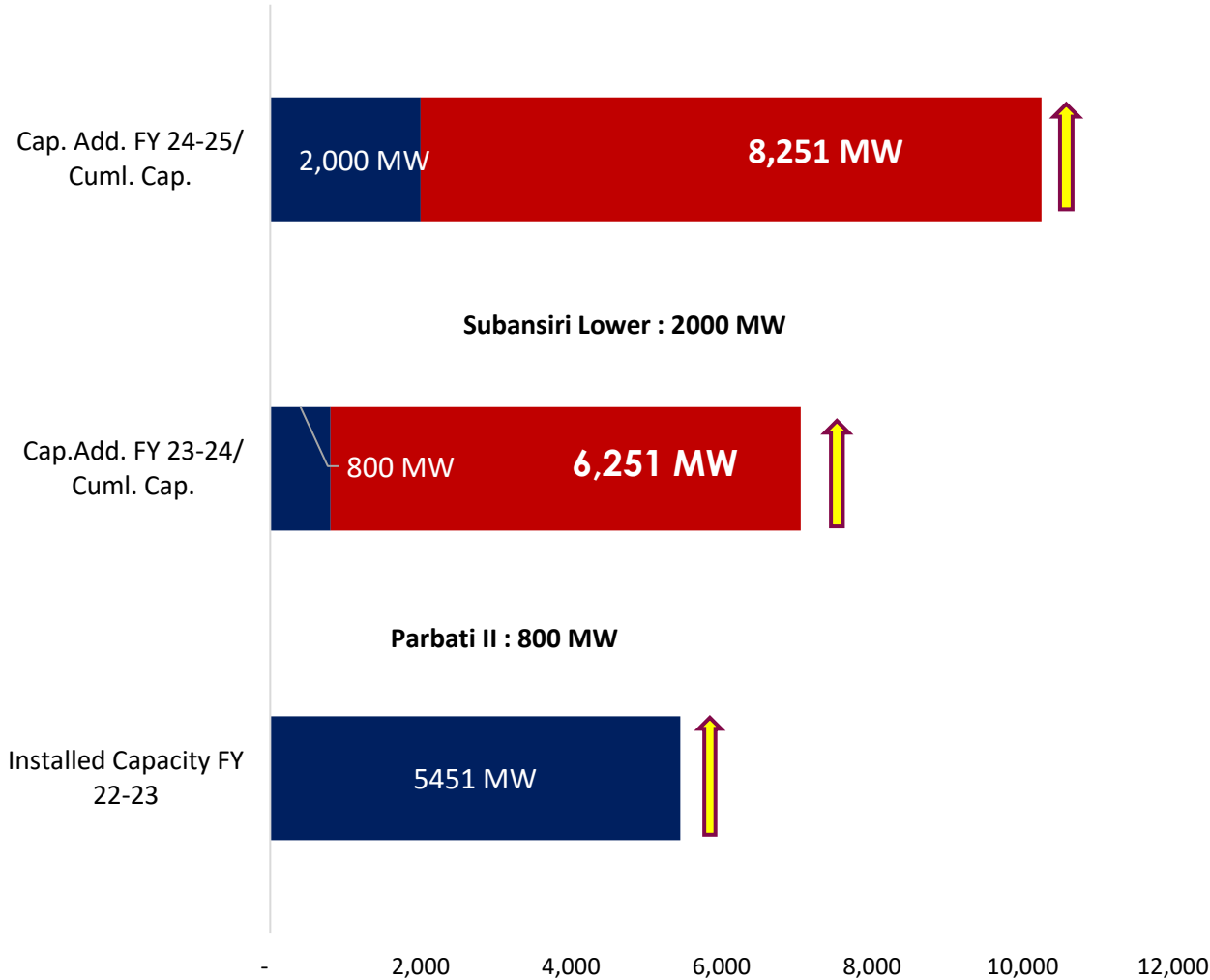


Financial Performance

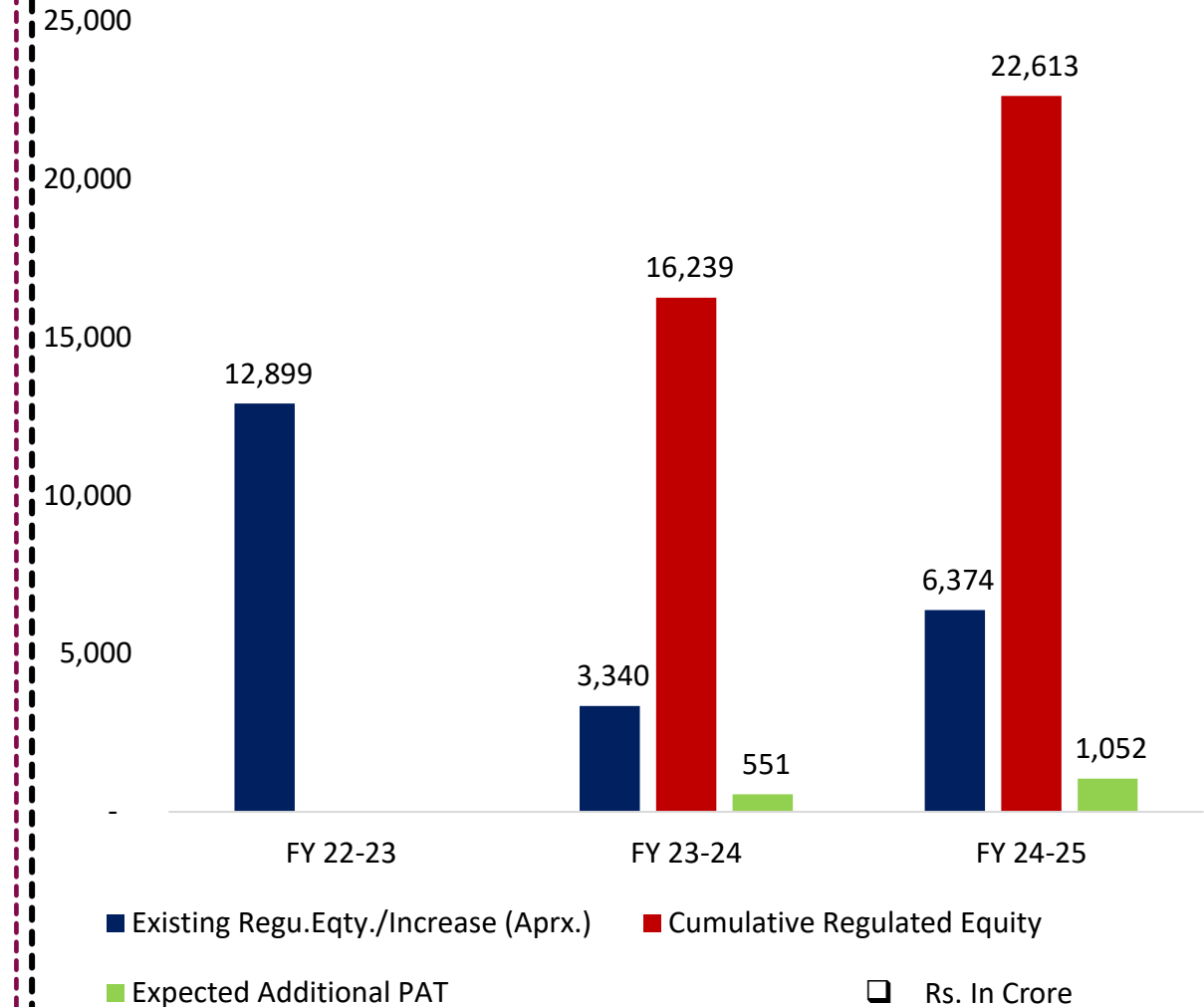


NHPC – Capacity Addition & Regulated Equity (Hydro)

Progressive Capacity Addition



Progressive Regulated Equity



Power Station with highest generation during FY'23 : Salal (3,240 MU, Annual D.E-3,082 MU)

NHPC – CAPEX



F.Y	Amount (Rs. In Crore)	Remarks
2015-16	2,793	(Actual)
2016-17	2,438	(Actual)
2017-18	2,722	(Actual)
2018-19	2,213	(Actual)
2019-20	4,155	(Actual)
2020-21	3,568	(Actual)
2021-22	5,166	(Actual)
2022-23	6,961	(Actual – Consolidated)
2023-24	10,857	(Consolidated Target)



- ❖ Hon'ble Prime Minister of India laid the foundation Stone of the Kwar Hydroelectric Project (540 MW) on 24.04.2022 and Cabinet Committee on Economic Affairs (CCEA) chaired by Hon'ble Prime Minister of India accorded investment approval to the project at an amount of Rs. 4526.12 crore.
- ❖ NHPC as an intermediary procurer awarded 2000 MW ISTS connected solar PV Power Project to 5 nos. of developers with a trading margin of 7 paise/unit. Out of 2000 MW, 320 MW was awarded to M/s Avaada Sunrays Energy Pvt. Ltd. at Bikaner, Rajasthan which has been fully commissioned on 10.12.2022.
- ❖ An MoU has also been signed between NHPC REL and Govt. of Uttar Pradesh on 31.01.2023 for setting up of 100 MW Floating Solar Power Projects in Uttar Pradesh.
- ❖ NHPC received a Letter of Intent dated 16.05.2023 from Gujarat Urja Vikas Nigam Limited (GUVNL) for 200 MW capacity Solar Power Project within 600 MW GSECL's Solar Park at Khavda (GSECL Stage-1). The estimated financial implication for the said Solar Power Project would be approx. Rs.1,008 Crore
- ❖ NHPC has inked an MOU with the Investment Board of Nepal at Kathmandu, Nepal on 18.08.2022 for development of 750 MW West Seti and 450 MW SR-6 hydroelectric projects. NHPC also signed MOU with PTC India Limited for Power Sales Arrangement of these projects on 30.08.2022.
- ❖ NHPC Renewable Energy Limited (a wholly owned subsidiary of NHPC Limited) has signed MOU with Govt. of Rajasthan on 24.08.2022 at New Delhi for "Development of 10,000 MW Ultra Mega Renewable Energy Power Park" in the State of Rajasthan.

Renewable Energy

Solar Energy



Clean Power For EVERY HOME

A (i) Standalone (Ownership Based)

(a) Under Construction

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tariff (Rs./unit)	Status of PPA
1	Solar Power Project, Ganjam (Odisha)	40	178	2023-24	2.75	PPA Signed with GRIDCO
2	600 MW Grid Connected Solar Power Project under CPSU Scheme, Gujarat	600	4,296	2024-25	2.45	Consent for procurement of power received for 1,000 MW.
3	300 MW Grid Connected Solar Power Project under CPSU Scheme, Rajasthan	300	1,732	2024-25	2.45	Power Usage Agreement with WB DISCOMs for 100 MW signed on 23.11.2022.
4	100 MW Grid Connected Solar Power Project under CPSU Scheme, Andhra Pradesh	100	577	2024-25	2.45	Power Usage Agreement with DISCOMs (Telangana) for 500 MW signed on 28.03.2023.
Total-(a)		1,040	6,782			

A (i) Standalone (Ownership Based)

(b) Tender Stage

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tentative Tariff (Rs./unit)	Status of PPA
1	Development of 75 MW capacity ISTS connected Solar Power Project anywhere in India for sale of power through Power Exchange	75	430	2024-25	2.82	PPA under exploration
2	Floating Solar Kerala (50MW), West Kallada	50	326	2024-25	3.82	PPA under exploration
Total-(b)		125	756			
Sub Total Standalone (Ownership Based) -A(i): (a+b)		1,165	7,538			

A (ii) Standalone (As Intermediary Procurer)

(a) Under Construction

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tariff (Rs./unit)	Status of PPA
1	Projects through Solar Power Developers, Rajasthan	2,000	-	2024-25 (Out of 2,000 MW, 320 MW capacity was awarded to M/s Avaada Sunrays Energy Pvt. Limited which has been commissioned on 10.12.2022. Further, Balance capacity of 1,680 MW is expected to be commissioned by 2024-25)	2.55 (1,680MW) 2.56 (320 MW)	PPA and PSA signed. Tariff adopted by CERC
	Total-(a)	2,000	-			
	Sub Total Standalone (As Intermediary Procurer)-A(ii) (a):	2,000	-			
	Grand Total-A:[A(i)+A (ii)]	3,165	7,538			

B. Subsidiary/JV Mode

(a) Under Construction

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tentative Tariff (Rs./unit)	Status of PPA
1	Solar Power Project, Kalpi (UP) (Subsidiary-BSUL)	65	312	2023-24 (Partial Commissioning of 26 MW achieved)	2.68	Executed between BSUL and UPPCL on 28.04.2022
2	Omkareshwar Floating Solar Park (MP) (Subsidiary – NHDC)	88	589	2023-24	3.22	Signed between MPPMCL, RUMSL & NHDC Ltd on 04.08.2022
3	Ground Mounted Solar PV Pant at Sanchi (M.P.) (Subsidiary – NHDC)	8	52	2023-24	3.22	Signed between MPPMCL NHDC Ltd on 26.12.2022.
	Total- (a)	161	953			

B. Subsidiary/JV Mode

(b) Under Tender Stage

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tentative Tariff (Rs./unit)	Status of PPA
1	300 MW Floating Solar Project at Rengali Reservoir, Odisha	300	1,900	2025-26	4.09	PPA under exploration
Total- (b)		300	1,900			

(c) Under Pipeline

S.No	Name of Project	Capacity (MW)	Estimated Capital cost (in Crs.)	Expected Commissioning Schedule	Tentative Tariff (Rs./unit)	Status of PPA
1	Solar Park, Jalaun (U.P.) under UMREPP (Subsidiary -BSUL)	1,200	840	2024-25	To be discovered	To be explored subsequently
Total- (c)		1,200	840			
Grand Total-B:(a+b+c)		1,661	3,693			

NHPC Projects At A Glance



NHPC-Energising India With Hydropower

NHPC – Projects in Operation

S. No	NHPC Project & State/UT	Installed Capacity (MW)	Design Energy (MU)	Year of comm.	Capital Cost as on 31.03.23	Tariff (18-19) (Rs./Kwh)*	Type of the project
1	Baira Siul (3x60) Himachal Pradesh	180	709	1981 (Sep)	312	2.23	Run of River (ROR) with small pondage
2	Loktak, (3x35) Manipur	105	448	1983 (May)	184	3.89	Storage
3	Salal, (6x115) of J&K	690	3,082	1987 (Nov)	1,047	2.82	ROR
4	Tanakpur, (3x40) Uttarakhand	94	452	1992 (Apr)	430	5.19	ROR
5	Chamera-I, (3x180) Himachal Pradesh	540	1,665	1994 (Apr)	2,107	2.22	Storage
6	Uri-I, (4x120) UT of J&K	480	2,587	1997 (Apr)	3,459	2.33	ROR
7	Rangit, (3x20) Sikkim	60	339	2000 (Feb)	520	4.27	ROR with small pondage
8	Chamera-II, (3x100) Himachal Pradesh	300	1,500	2004 (Feb)	2,028	2.01	ROR with small pondage
9	Dhauliganga-I, (4x70) Uttarakhand	280	1,135	2005 (Oct)	1,765	2.65	ROR with small pondage.
10	Dulhasti, (3x130) UT of J&K	390	1,907	2007 (Mar)	5,232	5.37	ROR with small pondage

NHPC – Projects in Operation... contd.

S.No.	NHPC Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost as on 31.03.23	Tariff (18-19) (Rs. /Kwh)*	Type of the project
11	Teesta-V, (3x170) Sikkim	510	2,573	2008 (Mar)	2,849	2.84	ROR with small pondage
12	Sewa-II, (3x40) UT of J&K	120	534	2010 (Jun)	1,155	5.50	ROR with small pondage
13	Chamera-III , (3x77) Himachal Pradesh	231	1,108	2012 (Jun)	2,147	3.94	ROR with small pondage
14	Chutak , (4x11) UT of Ladakh	44	213	2013 (Jan)	945	9.89	ROR
15	TLDP-III, (4x33) West Bengal	132	594	2013 (Mar)	1,943	5.30	ROR with small pondage
16	Nimoo Bazgo, (3x15) UT of Ladakh	45	239	2013 (Jan)	1,071	10.62	ROR with small pondage
17	Uri –II, (4x60) UT of J&K	240	1,124	2014 (Feb)	2,362	5.38	ROR
18	Parbati-III (4x130) Himachal Pradesh	520	1,963	2014 (May)	2,727	3.08	ROR with small pondage
19	TLDP IV (4x40) West Bengal	160	718	2016 (Aug)	1,822	4.35	Run of River with small pondage
20	Kishanganga (3x110) UT of J&K	330	1,713	2018 (Mar)	5,712	4.45	Run of River with Pondage
	Total-A	5,451	24,601		39,817	3.88	* Tariff for 2019-20, 2020-21 and 2021-22 yet to be notified.

NHPC – Projects in Operation... contd.

Renewable Energy

S.No	Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost as on 31.03.2023	Tariff 22-23 (Rs./unit)	Place of Project
1	Wind Power	50	94	2016	330	3.67	Lakhmana, Jaisalmer
2	Solar Power	50	106	2018	291	4.41	Theni/Dindigul District, Tamilnadu
	Total-B	100	200		621		
Sub Total Stand-alone(A+B)		5,551	24,802		40,438	3.87	

Operational Projects with Subsidiary

S.No	Project	Installed Capacity (MW)	Design Energy (MU)	Year of Comm.	Capital Cost as on 31.03.2023	Tariff 18-19 (Rs./Kwh)*	Type of the project
1	Indrasagar, (8x125) Madhya Pradesh	1,000	1,423	2005	5,326	3.80	Storage
2	Omkareshwar, (8x65) Madhya Pradesh	520	736	2007	3,138	4.62	Storage
	Total-C	1,520	2,160		8,465	4.08	* Tariff for 2019-20, 2020-21 and 2021-22 yet to be notified.
Grand Total-D:(A+B+C)		7,071	26,961				

NHPC: Projects Under Construction

Project Under Construction-Standalone

NHPC Project	Installed Capacity (MW)	Design Energy (MU)	Type of the project	CCEA Estimated Cost (Rs. Crore) (Price Level)	Anticipated Project Cost (Rs. Crore)	Provisional Project Expenditure till –March'23 (Rs. Crore)	Expected Commissioning Schedule
Subansiri Lower (8X250) Assam/ Ar. Pradesh	2,000	7,422	Run of River with small pondage	6,285 (Dec'02)	21,248 (completion level)	17,985	FY 24-25 (Q-3)
Parbati II (4X200) Himachal Pradesh	800	3,124	Run of River with small pondage	3,920 (Dec'01)	11,135 (July'22)	10,513	FY 23-24 (Q-4)
Dibang (12X240) Arunachal Pradesh	2,880	11,223	Hydropower cum flood moderation scheme	31,876 (May'21)	31,876 (May'21)	2,147	FY 31-32 (Q-4)
Total (A)	5,680	21,769		42,081	64,258	30,645	

NHPC: Projects Under Construction

Project Under Construction-Subsidiary							
NHPC Project	Installed Capacity (MW)	Design Energy (MU)	Type of the project	CCEA Estimated Cost (Rs. Crore) (Price Level)	Anticipated Project Cost (Rs. Crore)	Provisional Project Expenditure till –March'23 (Rs. Crore)	Expected Commissioning Schedule
Pakal Dul (4X250) UT of J&K	1,000	3,230	Run of River	8,112 (Mar'13)	8,112 (Mar'13)	2,922	FY 26-27 (Q-2)
Kiru (4X156) UT of J&K	624	2,272	Run of River	4,288 (July'18)	4,288 (July'18)	1,006	FY 25-26 (Q-4)
Kwar (4x135) UT of J&K	540	1,975	Run of River	4,526 (Sept.20)	4,526 (Sept.20)	382	FY 26-27 (Q-3)
Teesta-VI (4X125) Sikkim	500	2,400	Run of River	5,748 (July'18)	5,748 (July'18)	2,305	FY 26-27 (Q-2)
Rangit-IV (3X40) Sikkim	120	508	Run of River with small pondage	938 (Oct'19)	938 (Oct'19)	527	FY 24-25 (Q-2)
Ratle (4X205+30) UT of J&K	850	3,137	Run of River	5,282 (Nov'18)	5,282 (Nov'18)	270	FY 26-27 (Q-1)
Total (B)	3,634	13,522		28,894	28,894	7,412	
Total (A+B)	9,314	35,291		70,975	93,153	38,057	

NHPC Standalone Projects Under Clearance

S. N.	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Crore) & PL	Status
1	Teesta-IV (4x130) Sikkim	520	2,252	6,113 (Apr'21)	<ul style="list-style-type: none"> All statutory clearances have been received except forest clearance (stage-II). Compliance to FRA, 2006 is in progress. A meeting was chaired by the Hon'ble Minister of Power and New & Renewable Energy on 16.2.2023 wherein pending issues for obtaining FC-II were discussed. Fresh Proposal for Defence clearance uploaded on portal of MoD on 10.05.2023. Regular persuasion is being done with State Government for resolving the issues of compliance of Forest Clearance (Stage-II) and acquisition of 181.06 ha private & departmental land.
2	Dugar (4 x103 + 2x44) Himachal Pradesh	500	1,760	4,250 (Apr'2021)	<ul style="list-style-type: none"> MoU was signed between NHPC and Govt. of Himachal Pradesh for implementation of the Dugar HE Project by NHPC on BOOT basis for a period of 70 years. MoP has stated the key action points of the visit note of Secretary (Power) to Himachal Pradesh where it is mentioned that "Joint Secretary (Hydro), Ministry of Power may expedite the process of case for seeking investment approval to Dugar HEP of NHPC". In this regard, draft PIB proposal has been submitted to MoP on 13.05.2023.
3	Sawalkot (6x225+1x56) UT of J&K	1,856	7,995	22,705 (Completion)	<ul style="list-style-type: none"> The project shall be executed by NHPC on BOOT basis for the period of 40 years. Process for obtaining forest clearance has been initiated. Gram Sabha meetings have been conducted for all 30 villages for FRA compliance. All Gram sabha resolutions have been submitted by Gram Panchayats (GPs) to the respective DCs. NOCs under FRA for GPs in Udampur, Reasi and Ramban Districts have been issued by respective DCs under FRA, 2006. Identification and verification of CA area of Ramban and Udampur Districts are under process.
4	Uri-I Stage-II (2x120) UT of J&K	240	933	2,527 (Completion)	<ul style="list-style-type: none"> The project shall be executed by NHPC on BOOT basis for the period of 40 years. MOEF&CC has conveyed the approval to the TOR. EIA/ EMP studies is in progress. Process for obtaining forest clearance is in progress. DPR concurred by CEA on 07.03.2023 amounting to ₹2526.79 crore at completion level including ₹249.45 crores for IDC and ₹26.20 crores for enabling infrastructure.
Total		3,116	12,394	35,595	

NHPC –Subsidiary Company’s Project Under Clearance

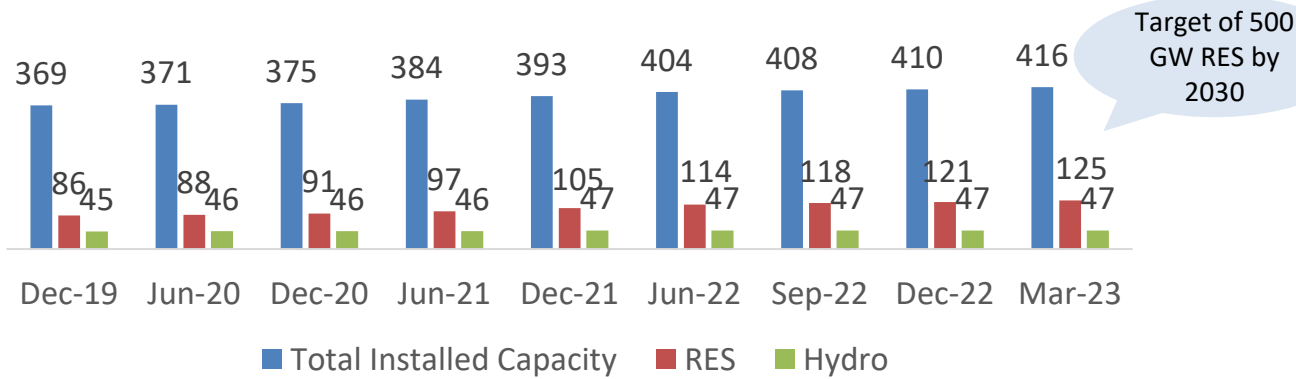
S.No	Projects	Installed Capacity (MW)	Design Energy (MUs)	Cost (In Cr.) & PL	Status
1	Kirthai-II (6x140 + 2x35 + 2x10) UT of J&K	930	3,330	6,384 (Feb'20)	<ul style="list-style-type: none"> • MOU signed between NHPC Ltd. and JKSPDCL on 03.01.2021. Project to be executed by CVPPPL • Appraisal transferred in name of CVPPPL by CEA on 29.12.2021, Defence Clearance accorded by MoD on 24.03.2022
2	Loktak D/S (2x33) Manipur	66	334	1,311 (Jul 20)	<ul style="list-style-type: none"> ▪ All statutory clearances of project except CCEA are available. ▪ PPA signed between Govt. of Manipur and LDHCL on 31.08.2020.
TOTAL		996	3,664	7,695	

NHPC –Projects Under Survey & Investigation

S. No.	Projects	State	Installed Capacity (MW)	Status
Projects Under FR/DPR Preparation				
1	Garba Tawaghat (3x210)	Uttarakhand	630	<ul style="list-style-type: none"> Implementation of the project is held up due to pending consent of Govt. of Nepal. In the 9th Joint Steering Committee (JSC) Meeting on India-Nepal Cooperation in Power Sector in Kathmandu, Nepal, it was agreed by the parties to explore development of viable hydro projects in Nepal for beneficial exploitation of water resources through formation of a Joint Hydro Development Committee. The project was discussed in the 7th Joint Standing Technical Committee (JSTC) & 9th Joint Committee Water Resources (JCWR) meetings held at Kathmandu, Nepal.
2	Dulhasti Stage-II (2x130)	UT of Jammu & Kashmir	260	<ul style="list-style-type: none"> MOU has been signed between NHPC Ltd. and JKSPDCL on 03.01.2021. The project shall be executed by NHPC on BOOT basis for the period of 40 years. MoEF&CC has conveyed the approval to the ToR for EIA/ EMP studies of the project. EIA studies are in progress. No forest clearance is required. NOC has been obtained from Forest department. Defence Clearance has been accorded by MoD. All (9 nos.) Pre-DPR chapters have been submitted to concerned directorates of CEA/CWC/GSI/CSMRS etc. and 7 Chapters cleared out of 9 Chapters.
	Total		890	

Industry Growth Drivers

India's Installed Power Generation Capacity (GW)



Policy Support

1. Paris Agreement – 2015 for carbon Neutralization:

- Reduce GHG emissions intensity by 45% below 2005 levels
- 50% of installed electric power capacity from non-fossil sources by 2030

2. 100% FDI under automatic approval in renewable sector

3. Budget 2023: path breaking announcements towards net-zero emission by 2070

- Government intends to reduce country's estimated total carbon emissions by 1bn tones by 2030
- Rs. 35,000 crore for energy transition and net-zero carbon emission
- Rs.19,700 crore earmarked for National Green Hydrogen Mission
- By 2030, committed to reduce carbon intensity of its GDP by 45% of 2005 level

Per Capita Electricity Consumption in 2021 (KwH)



- 
- 1** **GOI Parentage:** Strong backing of Government of India with a shareholding of 70.95% – A Mini Ratna Category – I PSU
 - 2** **Industry Leader:** Largest Hydro Power player in India with a capacity over 7 GW, ~14% of India's installed hydro capacity
 - 3** **Strong Track Record:** Execution/operational experience of 48 years, well diversified portfolio of renewable power generation and end to end capabilities from conceptualization to commissioning of hydro projects
 - 4** **Industry Growth:** Renewable energy has gained significant traction in India due to strong policy support, GOI's ambitious renewable power generation plans, commitment to global initiatives on clean energy (COP21) and lesser per capita power consumption
 - 5** **Robust Financial Performance:** Reporting strong financial performance and is a consistently dividend paying company
 - 6** **Capacity Addition to Drive Growth:** Currently engaged in construction of 16 projects aggregating to a total installed capacity of 10,515 MW. 6 more projects aggregating to 4,112 MW are in clearance and 2 projects aggregating to 890 MW are in survey and investigation



Thank
You

