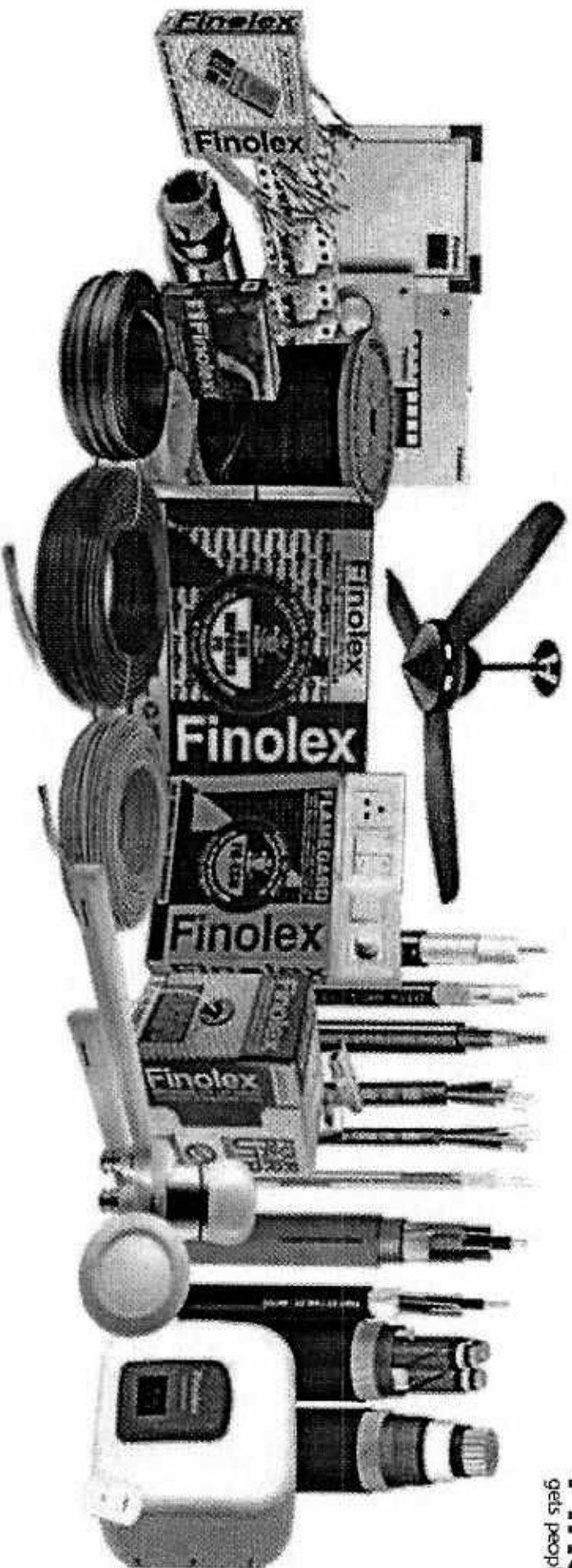


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Finolex Cables Limited

Earnings Presentation

March, 2020

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Impact of COVID 19

- With the increasing COVID cases in Pune, company decided to close its Pune operations (Urse, Pimpri Plants and Pimpri Corp. office) from March 22. With the declaration of the nationwide lockdown from March 24, all the other operations viz, Goa and Roorkee Plants, all depot/Branch offices etc. were also shut down, resulting in an absolute halt in operations.
- During the shutdown period, although manufacturing, marketing and logistics had come to a standstill, FCL encouraged its employees to work from home. The Company however, despite the shutdown, paid full wages and salaries to all its employees without any lay-offs.
- The Company Management and function-heads, worked on strategically planning the future and preparing for life post lockdown, in order to bring the operations of the Company back to normal.
- FCL opened up its Urse, Goa and Roorkee plants in the second week of May, 2020 followed by the Pimpri Plant and Office in the third week of May 2020.
- This started with strict procedures and practices in place with the 'FCL Safe Practices Manual' as well as the 'COVID 19 Response Strategy' and covered all the plant sites, offices, depots and stores, maintaining both productivity and safety.

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EXECUTIVE SUMMARY

One of India's leading Electricals brand - a market leader in India's Wires & Cables (W&C) industry and fast growing player in the FMEG category

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Diversified product portfolio

- **Wires and cables:** Light duty cables, power and control cables and communication cables.
- **FMEG:** Electric switches, switchgears, LED Lightings, Fans, water heaters.
- Leveraging the brand equity of Finolex, extended our brand offerings to home appliances

Multi location manufacturing

- 5 manufacturing plants
- 28 depots
- JV with Sumitomo, Japan for EHV cables
- Marketing JV with Corning for Optic Fibre technology
- Technical collaboration with NSW, Germany for manufacture of cables for submersible pump industry.

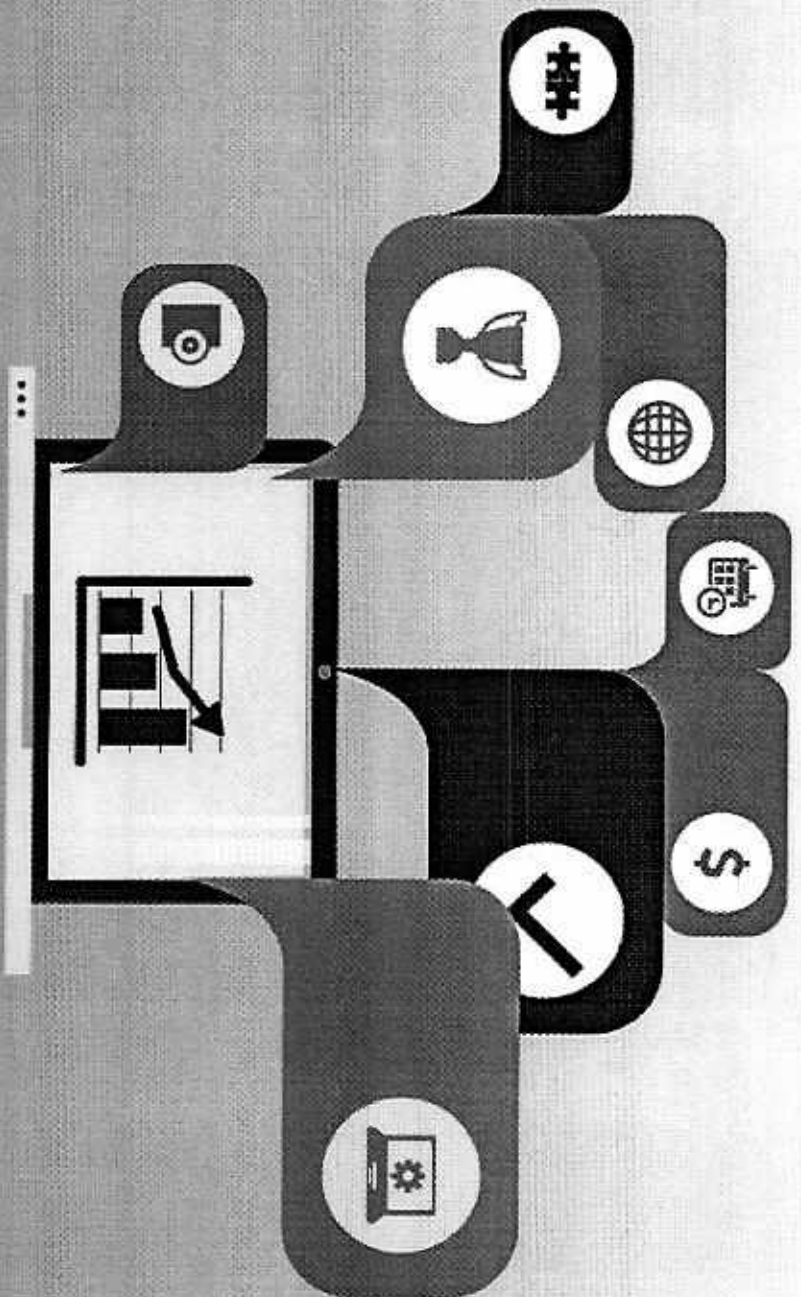
Widespread distribution network

- 380 distributors
- 4000+ dealers
- 40000+ retailers
- Launched our own e-retail site

FY20 Financial (Cr)

Revenue	3049.19
EBITDA	541.79
PAT	402.48
EPS	Rs. 26.32





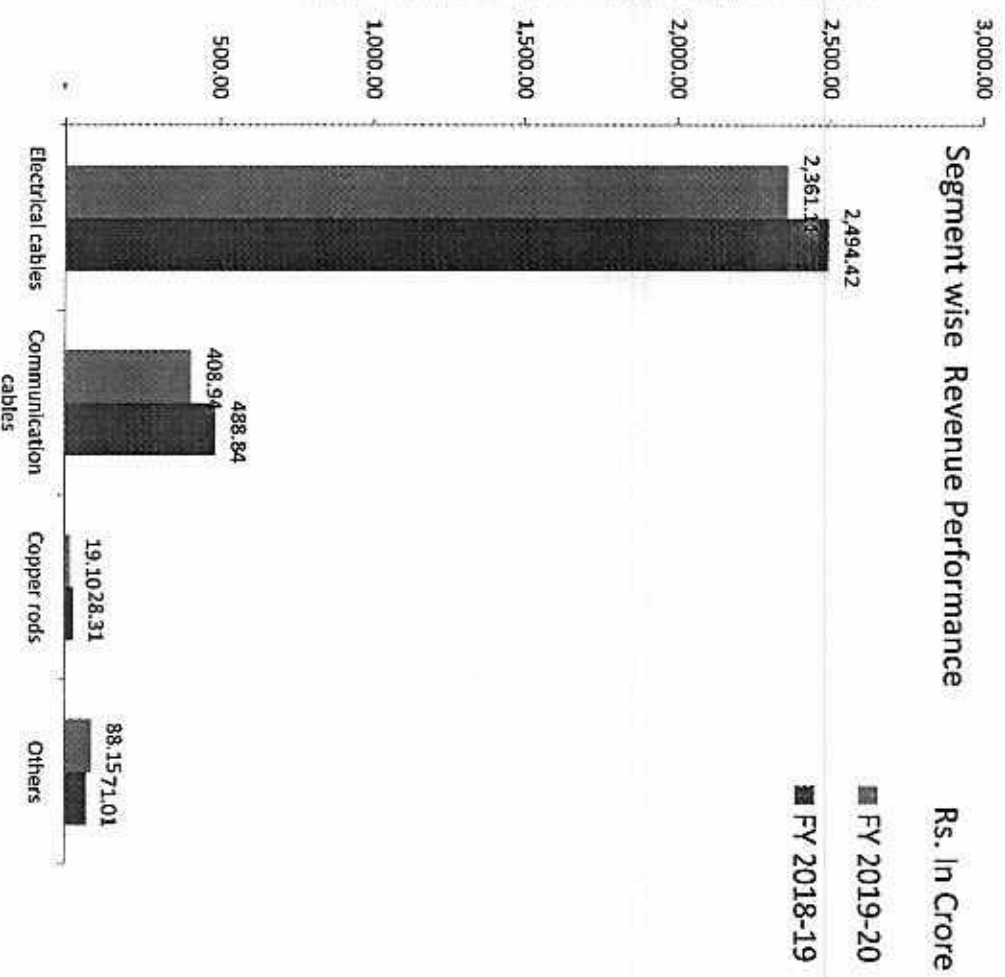
COMPANY OVERVIEW

Premium Player – Cables and Wires Industry



Electrical Cables and Wires

- Leader in the electrical housing wires segment and commands a premium over its peers
- Strong brand positioning and superior product quality enabled the company to achieve higher margins
- This segment accounts for 82% of the company's revenues and offers a wide range of products in each of the segments
- Reported 82% in electrical W&C segment.



Emerging Player - FMEG

- Finolex entered the FMEG segment to capitalize on the strong brand recall and sales network
- The company first entered the electrical switches and lighting segment, leveraging its widespread distribution network in the country. The company then introduced switchgears, fans and water heaters
- New products within FMEG sector grew by more than 24% y-o-y each in FY19
- These products have been well accepted, along with that the distributors have expanded and continued presence in visual media have contributed to the Finolex brand recognition.
- For these products the company has setup a different channel.

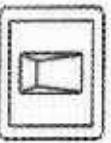
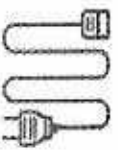


Category & Product Portfolios

WIRES & CABLES

Light Duty Cables

- FR PVC insulated industrial cables
 - Flexible cables
 - Solar cables
 - Elevator cables
 - 3CF & WW cables for agricultural sector
 - Auto & Battery cables for automobile sector
 - Power & Control Cables
 - LT & HT Power and Control cables
- ### Communication Cables
- Co-axial cables
 - Speaker cables
 - CCTV cables



- Jelly Filled Telephone Cables (JFTC)
- LAN cables
- Telephone cables
- Optic Fibre cables

LIGHTING

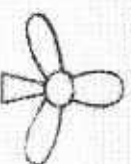
- CFL range
- T5 & T8 tubes
- Ballast Fittings
- Luminaries
- LED products

ELECTRICAL SWITCHES

- Switch range
- Mounting boxes

SWITCHGEAR

- MGB
- RCCB
- DB

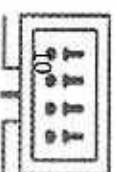


FANS

- Ceiling fans
- Table fans
- Wall fans
- Pedestal fans
- Exhaust fans

WATER HEATERS

- Instant
- Storage



Group	Product Covered	Applications
<ul style="list-style-type: none"> • Electrical Cables 	<p style="text-align: center;">➔</p> <ul style="list-style-type: none"> • 1100 V PVC Insulated Cables • Motor winding PVC insulated • Automotive/battery cables • UPS cables • Heavy duty, underground, low voltage and control cables • Heavy duty, underground, high voltage, power cable • Elevator cables • Solar Cables 	<p style="text-align: center;">➔</p> <p>Electrification of industrial establishments, used by construction industry, electrical panel wiring and consumer electrical goods</p> <p style="text-align: center;">➔</p> <p>Submersible pumps and electrical motors</p> <p style="text-align: center;">➔</p> <p>Wiring harness for automobile industry and battery cables for various applications</p> <p style="text-align: center;">➔</p> <p>For providing power from the UPS to the computer / appliances in the networking environment</p> <p style="text-align: center;">➔</p> <p>Connection to the user point from main supply of power</p> <p style="text-align: center;">➔</p> <p>Intra-city power distribution network</p> <p style="text-align: center;">➔</p> <p>For use by Elevator industry</p> <p style="text-align: center;">➔</p> <p>Specially insulated cables for use in solar parks</p>

Group	Product Covered	Applications
<ul style="list-style-type: none"> Copper Rods Electrical Switches Lamps 	<ul style="list-style-type: none"> CCC rods of 8 mm diameter Premium and classic switches, sockets, regulators, etc Retrofit/non-retrofit CFL lamps and T5 Tube Lights and Fittings, LED based lighting solutions 	<ul style="list-style-type: none"> Raw material for manufacturing copper-based Cables For power supply to equipment in domestic, commercial and industrial environment Lighting for homes, hotels, shops, offices and factories (both indoor and outdoor applications). Also available for street light applications
<ul style="list-style-type: none"> Electrical Fans 	<ul style="list-style-type: none"> Ceiling Fans, Portable Fans, Exhaust Fans Miniature Circuit Breakers (MCB), Residual Current Circuit Breakers (RCCB), Moulded Current Circuit Breakers (MCCB) and Distribution Boxes 	<ul style="list-style-type: none"> For use in domestic, commercial and industrial environment For use in voltage surge protection and safety applications in domestic and commercial environment
<ul style="list-style-type: none"> Water Heaters 	<ul style="list-style-type: none"> Instant and Storage Water Heaters 	<ul style="list-style-type: none"> For use in domestic and commercial environment

Group

Product Covered

Applications

• **Communication Cables** →

- Jelly filled telephone cables (JFTCs) → Telephone line connections to exchanges and users
- Local area network (LAN) cables → Indoor and outdoor networking, voice and data transmission, broadband usage
- PE insulated telephone cables → Telephone instrument connections to EPABX
- Coaxial cables → Cable TV network solutions, microwave communications, mobile towers
- Speaker cables → Broadcasting applications in buildings and electronic goods
- Optic Fibre → Principal raw material for Optic Fibre cables
- Optic Fibre cables → Networks requiring high speed transfer of large bandwidth for voice image and data transmission
- V-SAT cables → For connecting V-SAT dish to base station
- CCTV cables → For better quality of CCTV images

Key Management Team

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Mr. Deepak Chhabria

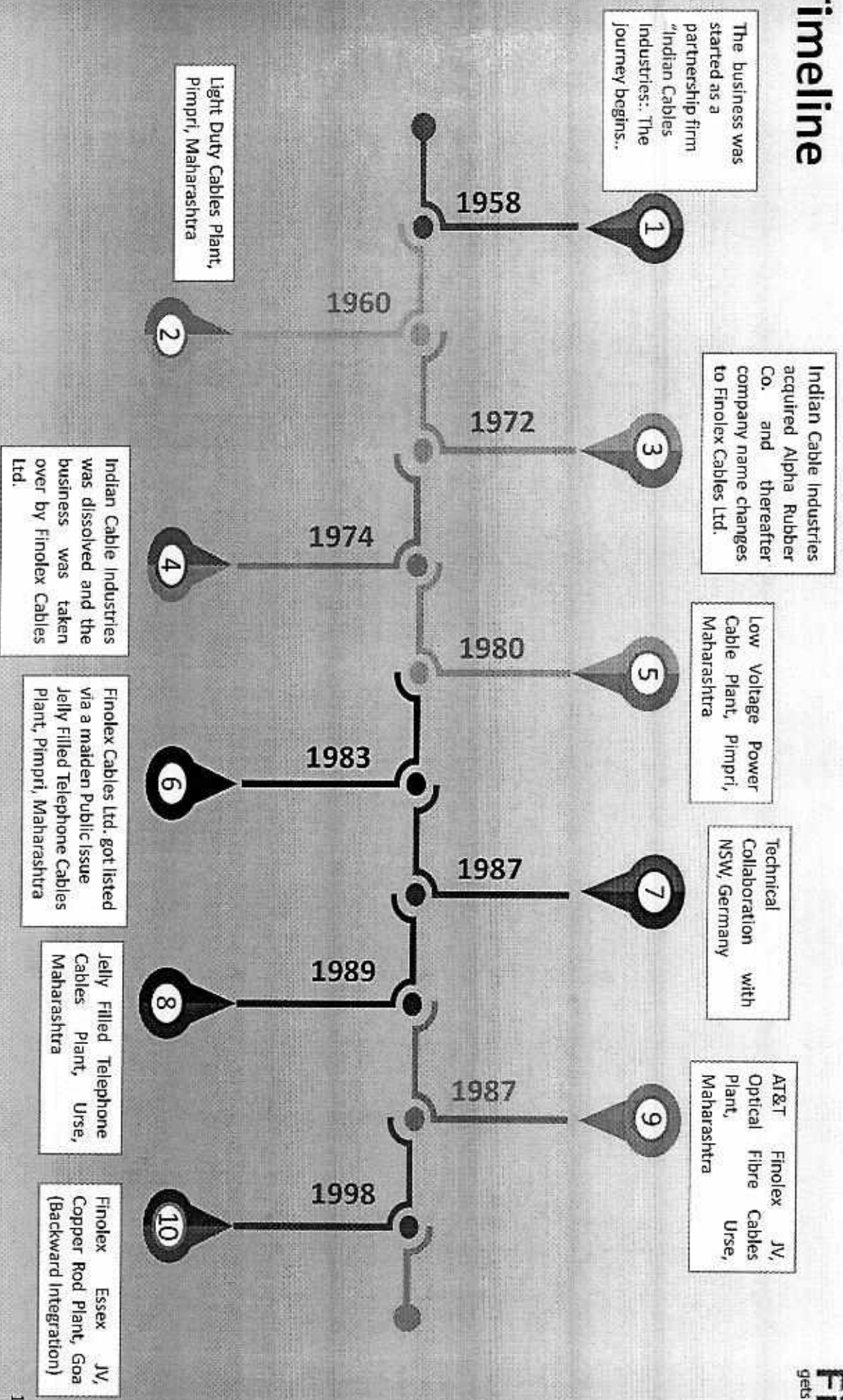
He joined Finolex Cables Ltd as Deputy Production Manager in 1986. Deepak was actively involved in setting up 9 different manufacturing Plant across 4 locations in India. Under his able guidance, the Company now produces a variety of electrical and communication cable products, copper rods, electrical switches, Compact Fluorescent lamps and PVC Sheets. Mr. Chhabria is also the Chairman of Finolex J-Power Systems Pvt. Ltd. A Project has been set up in a Joint Venture with J-Power Systems, Japan to produce power cables up to 500 KV, the only Indian Company to have this capability. J-Power Systems is a 100% subsidiary of Sumitomo Electricals of Japan. Mr. Chhabria has also served as the Chairman of CII-Pune Chapter in 2008. S.S.C – Loyola High School, Pune A-Levels – Seven Oaks School, Kent, England Bachelors in Engineering Management – University of Evansville, Indiana, USA.



Mr. Mahesh Viswanathan

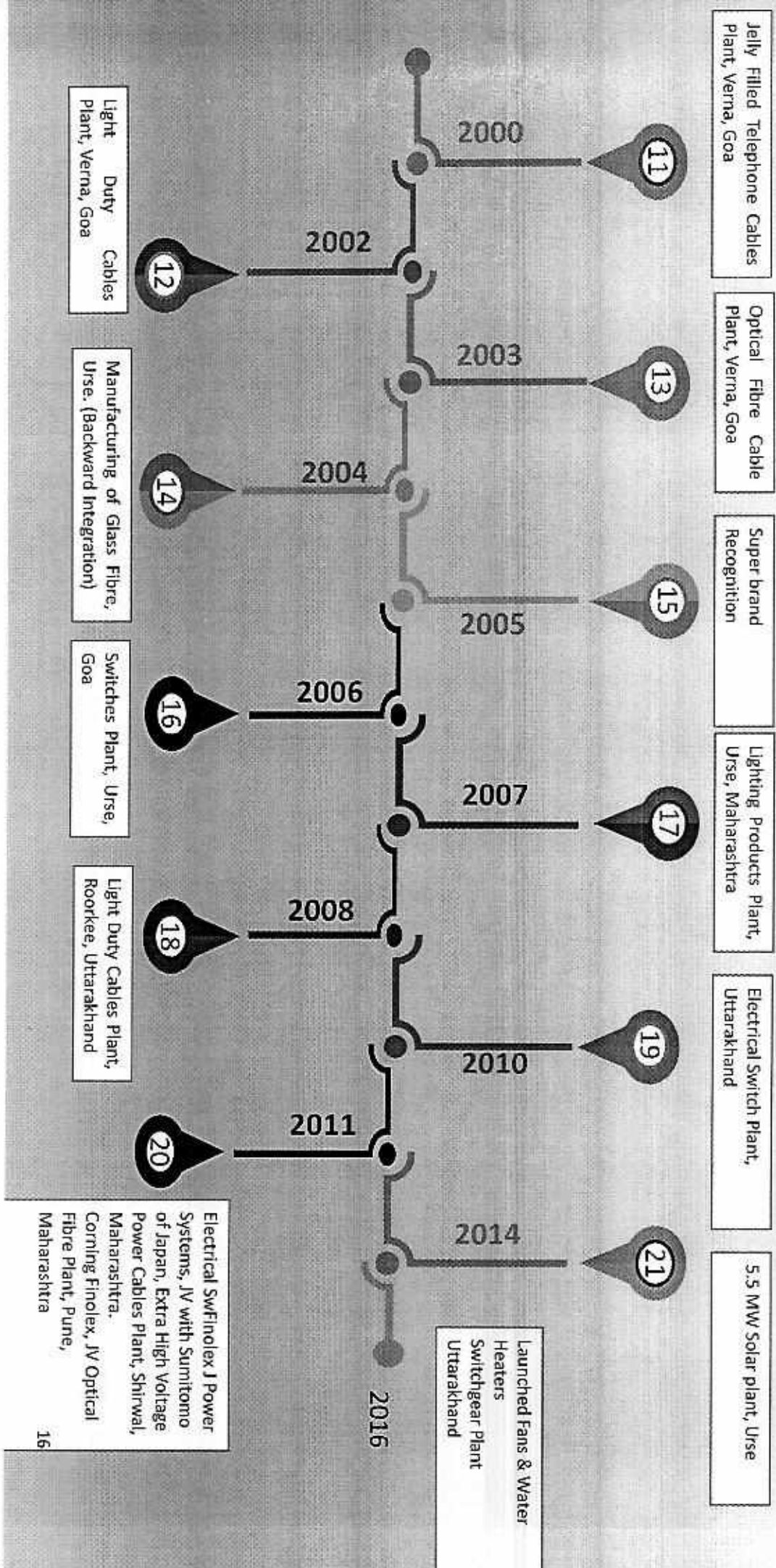
He joined Finolex Cables Ltd in October 2008. A Chartered Accountant by profession, he has many years of experience in the industry and in various aspects such as Management, Taxation and Finance. He has worked with several Multinational companies.

Timeline



Timeline

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GEOGRAPHICAL FOOTPRINT

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6

28

Manufacturing Plants

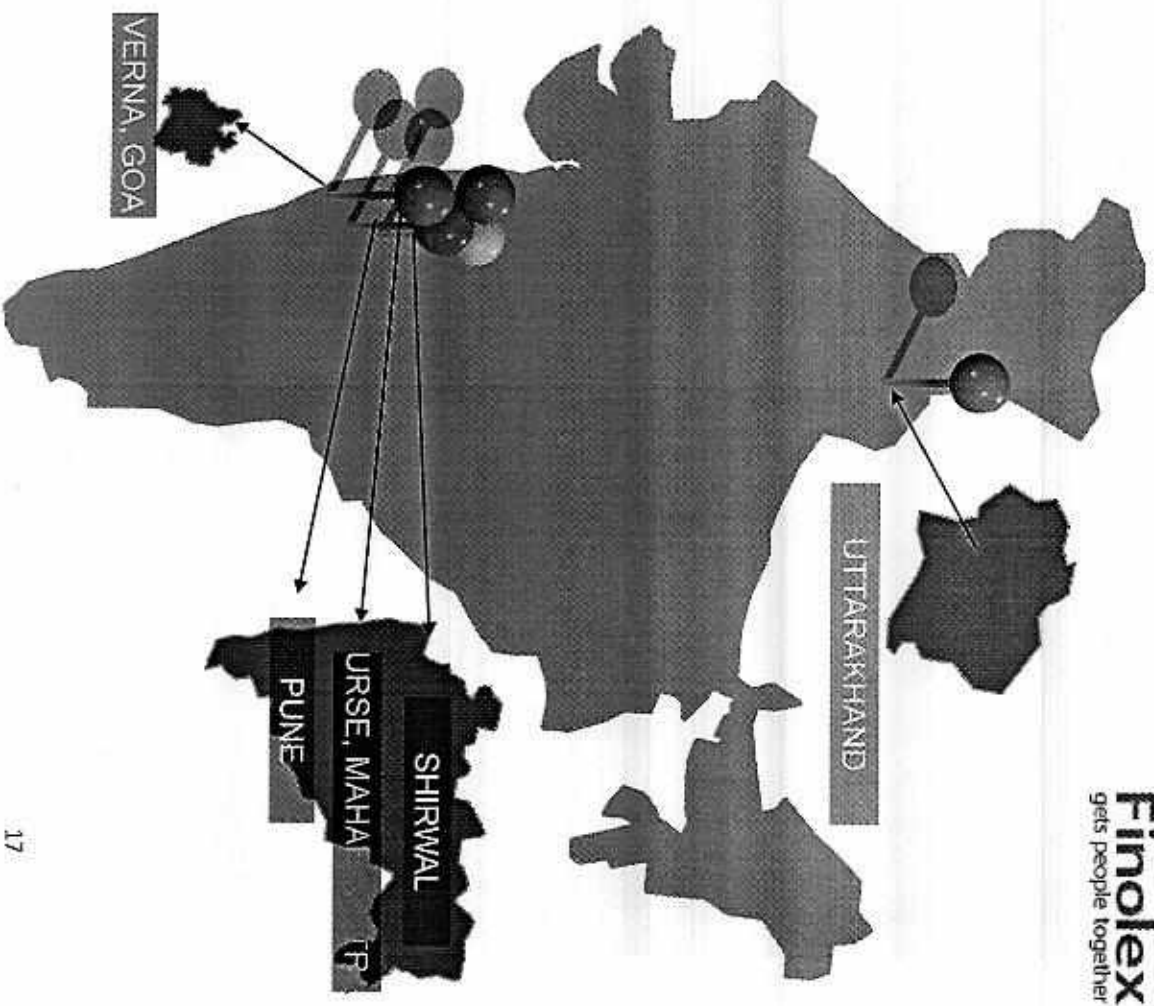
Depots

4000+

40000+

Channel Partners

Dealers

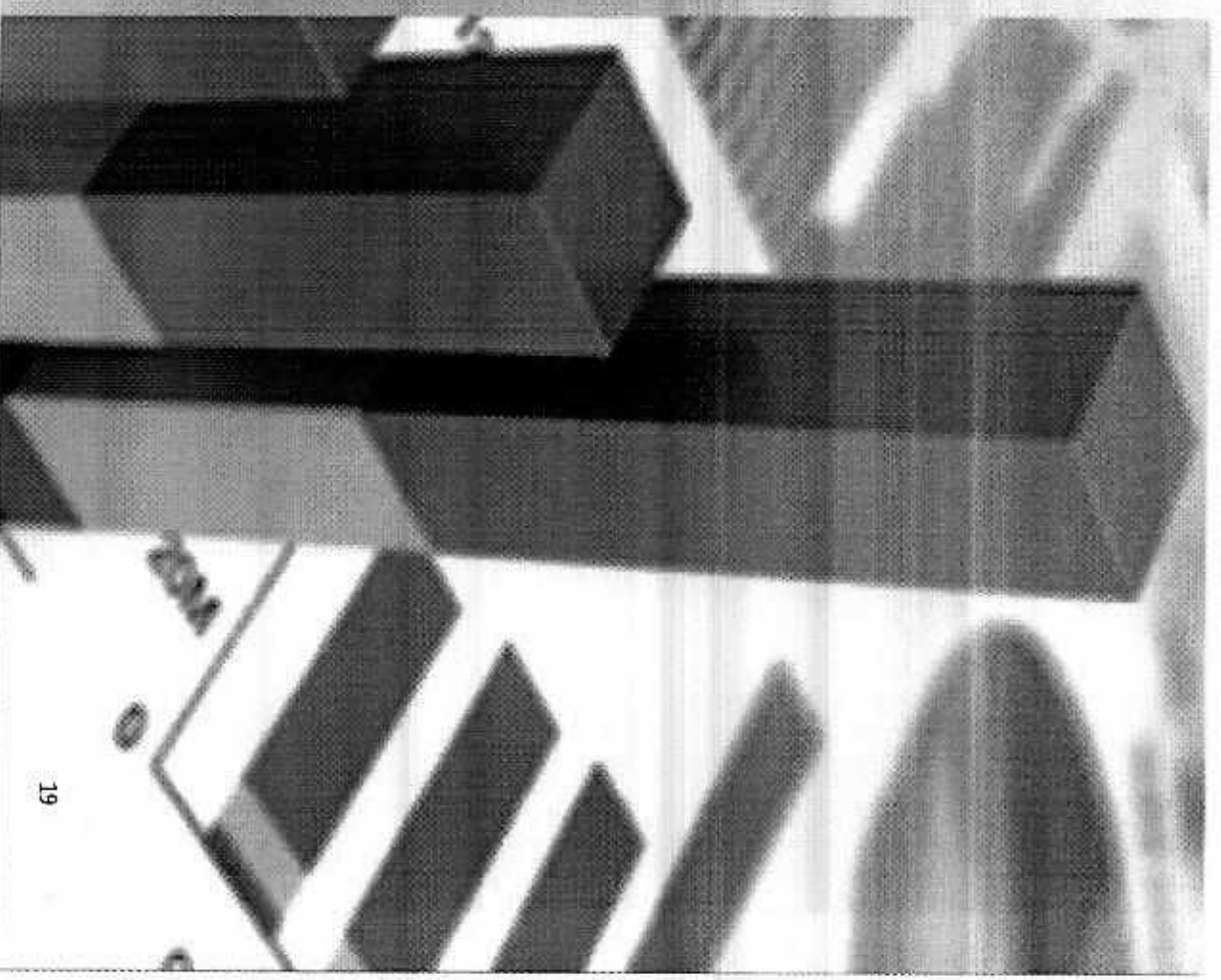


Geographical Footprint

LOCATION	PRODUCT
Uttarakhand	Electric wire for construction; wires for automobile; switches; switchgear and Agricultural applications
Shirwal, Maharashtra	Extra High Voltage (EHV) cables (JV with Sumitomo, Japan)
Urse, Maharashtra	All electrical cables, optic fibre cables and all communication cables
Pune – Pimpri	Minimal manufacturing, telephone cables; winding wire for pump-set industry
Verna Goa	All electrical products except power cables, communication cables except lan cables
Ponda Goa	Copper Rods

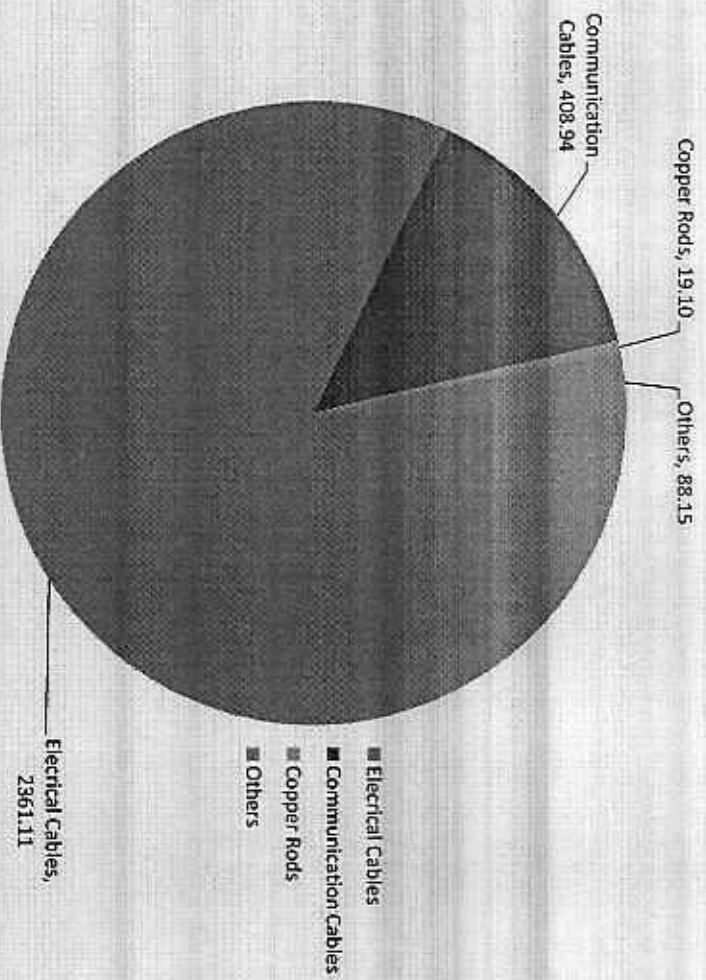
Note: Capacity utilization levels at all manufacturing facilities around 65% during 2019-20

FINANCIAL OVERVIEW



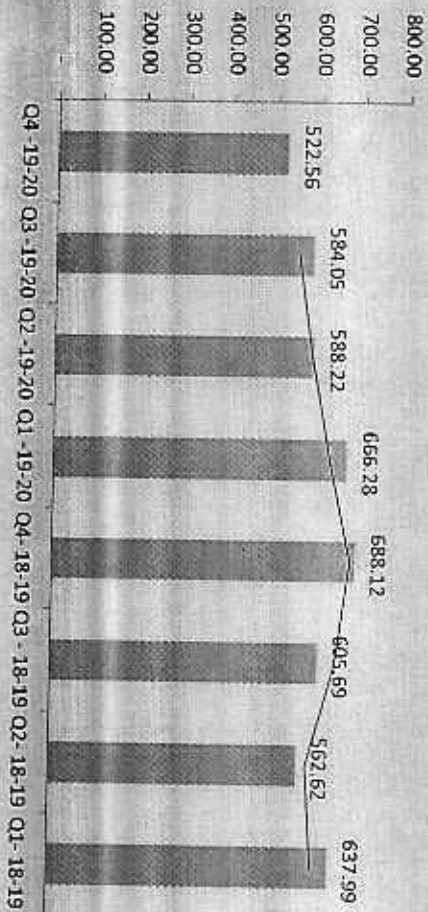
FY 2019-20 – Segment Revenue Breakup

- **Margins**
 - Electrical Cable EBIT margin improved from 15% to 16% due to better product mix
 - Communication Cable EBIT margin decreased from 14% to 6% due to reduction in supply order from telecommunication & government companies and secondly fall in fiber prices globally.
- **Profitability**
 - Total revenue for the year stood at Rs 3049.19 Cr
 - Profit for the year stood at Rs 402.48 Cr
- **Inter segment Revenue**
 - Inter segment revenue pertaining mainly to copper rods' consumption stood at Rs. 539.73 Cr

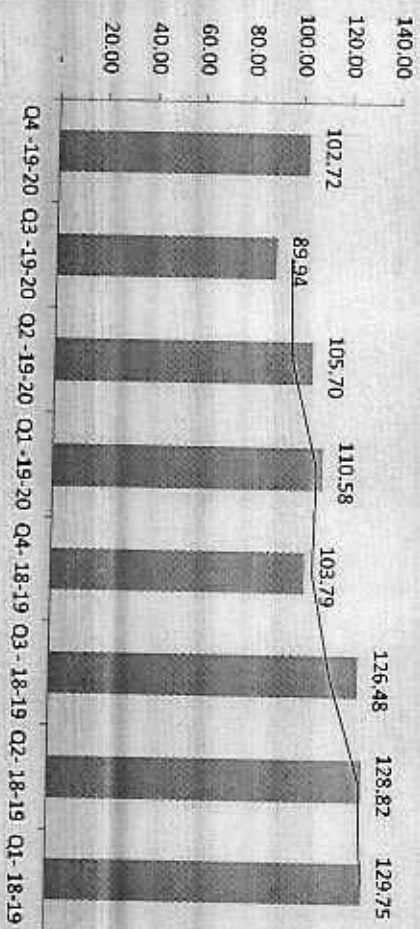


Quarterly Segment Revenue

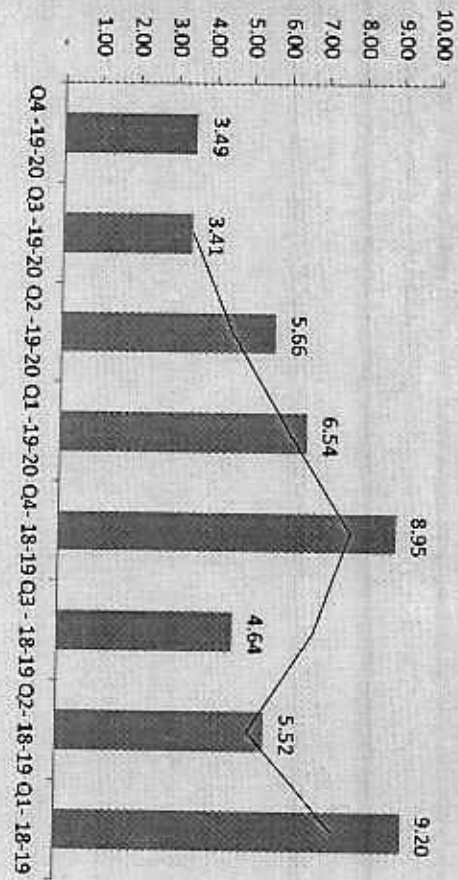
Electrical cables



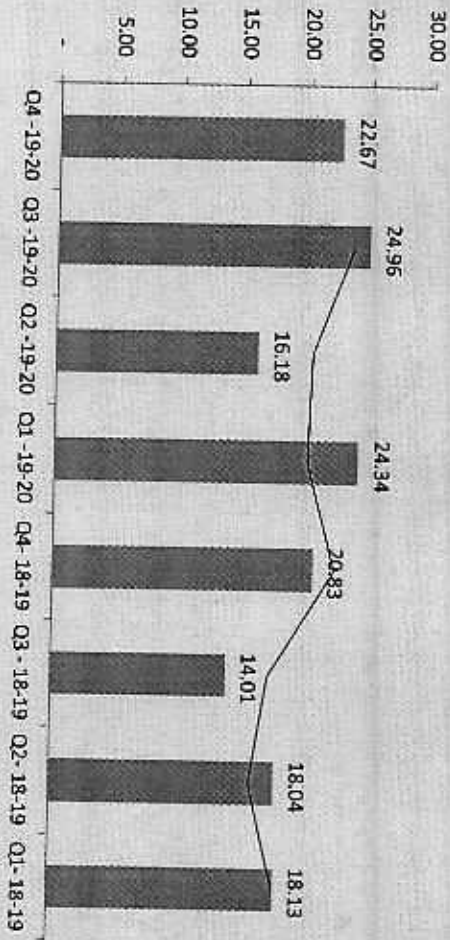
Communication cables



Copper rods



Others



* All the amounts are INR in Crore

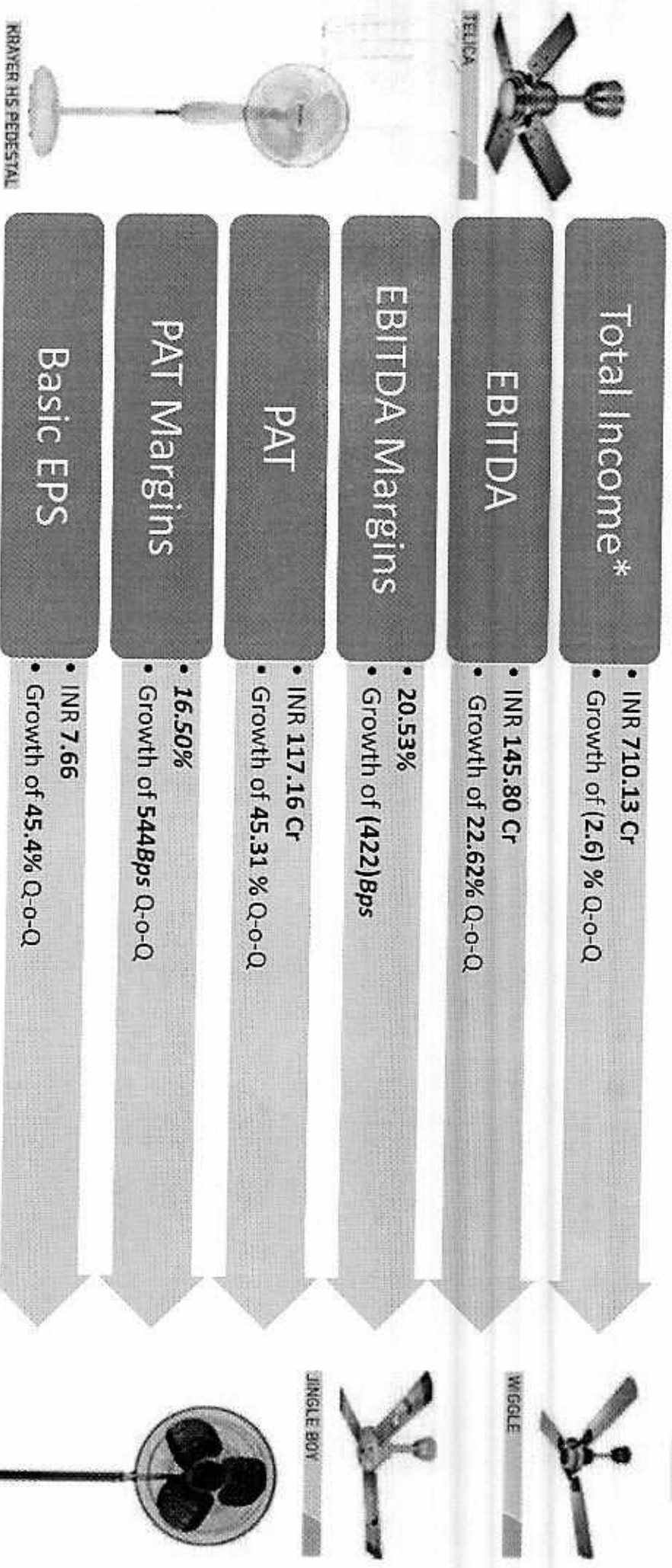
QUARTER 4
UNDER
REVIEW

FY 19 - 20
UNDER
REVIEW

Q4-FY20 KEY FINANCIAL HIGHLIGHTS

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(Standalone Q4 Vs Q3 FY 2019-20 Performance) (INR Cr)



*Includes other income

STANDALONE FINANCIAL HIGHLIGHTS Q4-FY20 (IND-AS)

INCOME STATEMENT (INR Cr)	Q4-FY20	Q3-FY20	Q-o-Q	Q4-FY19	Y-o-Y
Total Income*	710.13	728.88	(2.6)%	847.05	(16.2)%
Total Expenses	564.33	609.97	(7.5)%	696.79	(19.0)%
EBITDA	145.80	118.91	22.6%	150.26	(3.0)%
EBITDA Margins (%)	20.53%	16.31%	422Bps	17.47%	306Bps
Depreciation	9.57	9.64	(0.7)%	10.05	(4.8)%
EBIT	136.23	109.27	24.7%	140.21	(2.8)%
EBIT Margins (%)	19.18%	14.99%	419Bps	16.55%	263Bps
Finance Cost	0.73	0.37	97.3%	0.27	170.4%
Profit Before Tax	135.50	108.9	(24.4)%	134.94	0.4%
Tax	18.34	28.27	(35.1)%	55.04	(66.7)%
Profit After Tax	117.16	80.63	45.3%	84.90	38.0%
PAT Margins (%)	16.50%	11.06%	544Bps	10.02%	648Bps
Other Comprehensive Income	(32.69)	8.28	(494.8)%	8.12	(502.6)%
Total Comprehensive Income	84.47	88.91	(5.0)%	93.02	(9.2)%
EPS Basic (INR)	7.66	5.27	45.4%	5.55	38.0%

*Includes other Income

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LIGHTING PRODUCT



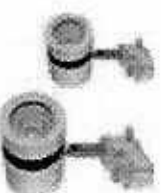
HIGHBAY



LED SLIM
PANELS ROUND



NEW LED BULB
BLUSTER PACK



LED TRACK LIGHT

CONSOLIDATED FINANCIAL HIGHLIGHTS MARCH 20 (IND-AS)

INCOME STATEMENT (INR Cr)	Q4-FY20	Q3-FY20	Q-o-Q	Q4-FY19	Y-o-Y
Total Income*	669.93	728.88	(8.1)%	847.05	(20.9)%
Total Expenses	570.91	602.47	(5.2)%	678.62	(15.9)%
EBITDA	99.02	126.41	(21.7)%	168.44	(41.2)%
EBITDA Margins(%)	14.78%	17.34%	(256)Bps	19.88%	(510)Bps
Depreciation	9.57	9.64	(0.7)%	10.05	(4.8)%
EBIT	89.45	116.77	(23.4)%	158.39	(43.5)%
EBIT Margins (%)	13.35%	16.02%	267Bps	18.70%	(535)Bps
Finance Cost	0.73	0.37	97.3%	0.27	170.4%
Share of net Profit of an Associate & JV	8.19	19.43	(57.8)%	27.27	(70.0)%
Profit Before Tax	96.91	135.83	(28.7)%	185.38	(47.7)%
Tax	32.42	33.11	(2.1)%	61.25	(47.1)%
Profit After Tax	64.49	102.72	(37.2)%	124.13	(48.0)%
PAT Margins (%)	9.63%	14.09%	(446)Bps	12.13%	(250)Bps
Other Comprehensive Income	(32.83)	8.23	(498.9)%	7.56	(133.7)%
Total Comprehensive Income	31.66	110.95	(71.5)%	131.69	(76.0)%
EPS Basic (INR)	4.22	6.72	(37.2)%	8.12	(48.0)%

*Includes other income

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HIGH BAY



LED SLIM
PANELS ROUND



NEW LED BULB
BUSTER PACK



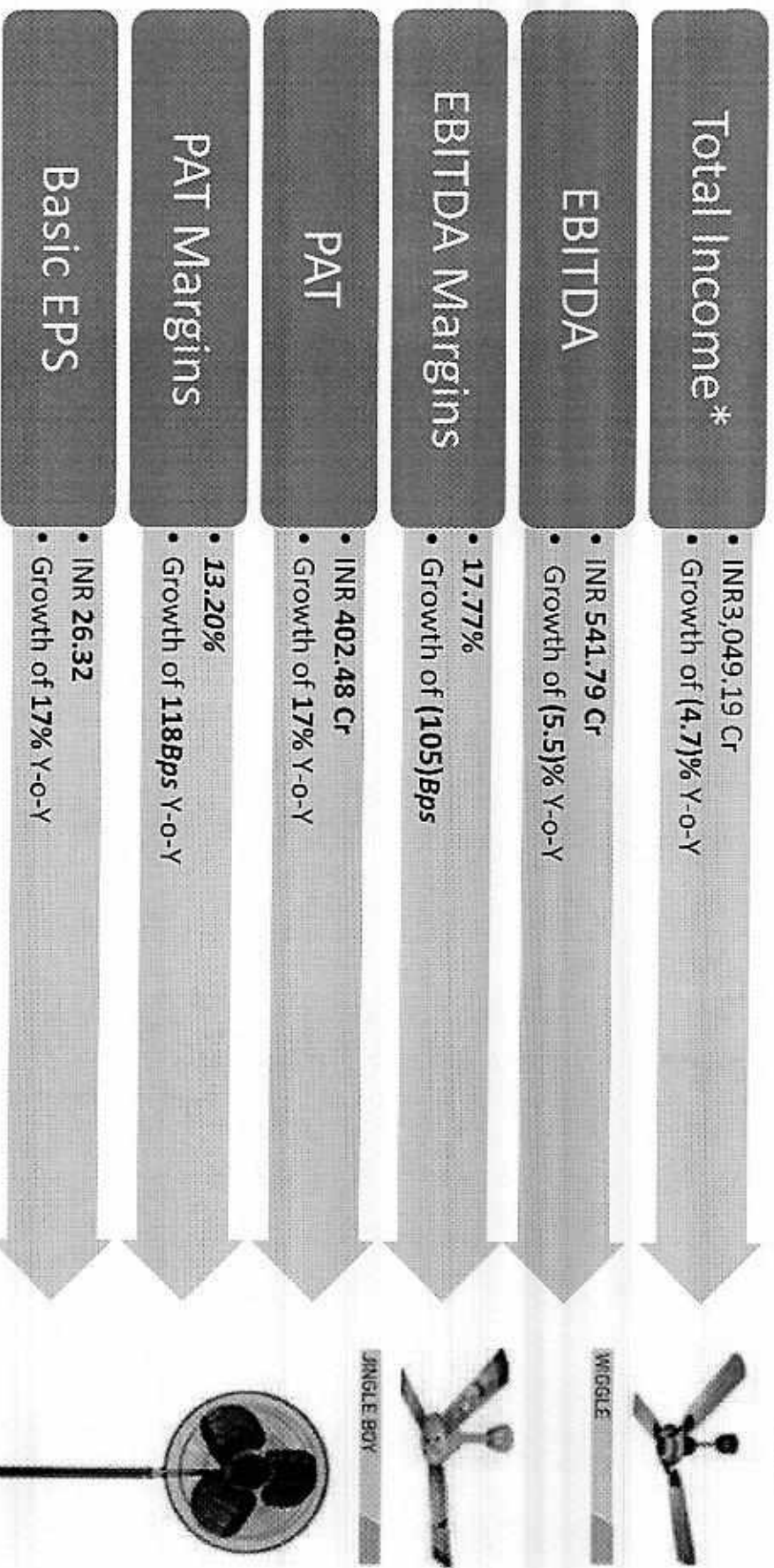
LED TRACK LIGHT

FY19 -20
UNDER
REVIEW

FY2019-20 KEY FINANCIAL HIGHLIGHTS

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(Standalone Year Performance) (INR Cr)



*Includes other income

STANDALONE FINANCIAL HIGHLIGHTS MARCH 20 (IND-AS)

INCOME STATEMENT (INR Cr)	MARCH 20	MARCH 19	Y-o-Y
Total Income*	3049.19	3199.62	(4.7)%
Total Expenses	2507.40	2626.30	(4.5)%
EBITDA	541.79	573.32	(5.5)%
EBITDA Margins (%)	17.77%	17.92%	(15)BPS
Depreciation	38.91	40.55	(4.0)%
EBIT	502.88	532.77	(5.6)%
EBIT Margins (%)	16.49%	16.65%	16BPS
Finance Cost	1.55	0.92	68.5%
Profit Before Tax	501.33	531.86	(5.7)%
Tax	98.85	187.77	(47.4)%
Profit After Tax	402.48	344.09	17%
PAT Margins (%)	13.20%	10.75%	245BPS
Other Comprehensive Income	(40.55)	(24.57)	65.0%
Total Comprehensive Income	361.93	319.52	13.3%
EPS Basic (INR)	26.32	22.50	17.0%

*Includes other income

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LIGHTING PRODUCT



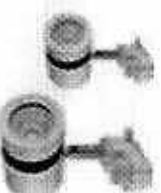
HIGHBAY



LED SLIM
PANELS ROUND



NEW LED BULB
BLISTER PACK



LED TRACK LIGHT

CONSOLIDATED FINANCIAL HIGHLIGHTS MARCH 20 (IND-AS)

INCOME STATEMENT (INR Cr)	MARCH 20	MARCH 19	Y-o-Y
Total Income*	2968.80	3159.43	(6.0)%
Total Expenses	2493.88	2608.13	(4.4)%
EBITDA	474.92	551.30	(13.9)%
EBITDA Margins(%)	16.00%	17.45%	(145)BPS
Depreciation	38.91	40.55	(4.0)%
EBIT	436.01	510.75	(14.6)%
EBIT Margins (%)	14.69%	16.17%	(148)BPS
Finance Cost	1.55	0.92	68.5%
Share of net Profit of an Associate & JV	77.59	100.38	(22.7)%
Profit Before Tax	512.05	610.22	(16.1)%
Tax	98.85	187.77	(47.7)%
Profit After Tax	391.00	407.47	(4.0)%
PAT Margins (%)	13.17%	12.90%	27BPS
Other Comprehensive Income	(41.40)	(25.60)	61.7%
Total Comprehensive Income	349.60	381.87	(8.5)%
EPS Basic (INR)	25.57	26.66	(4.0)%

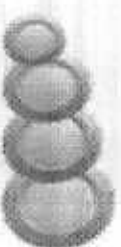
*Includes other income

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LIGHTING PRODUCT



HIGH BAY



LED SLIM
PANELS ROUND

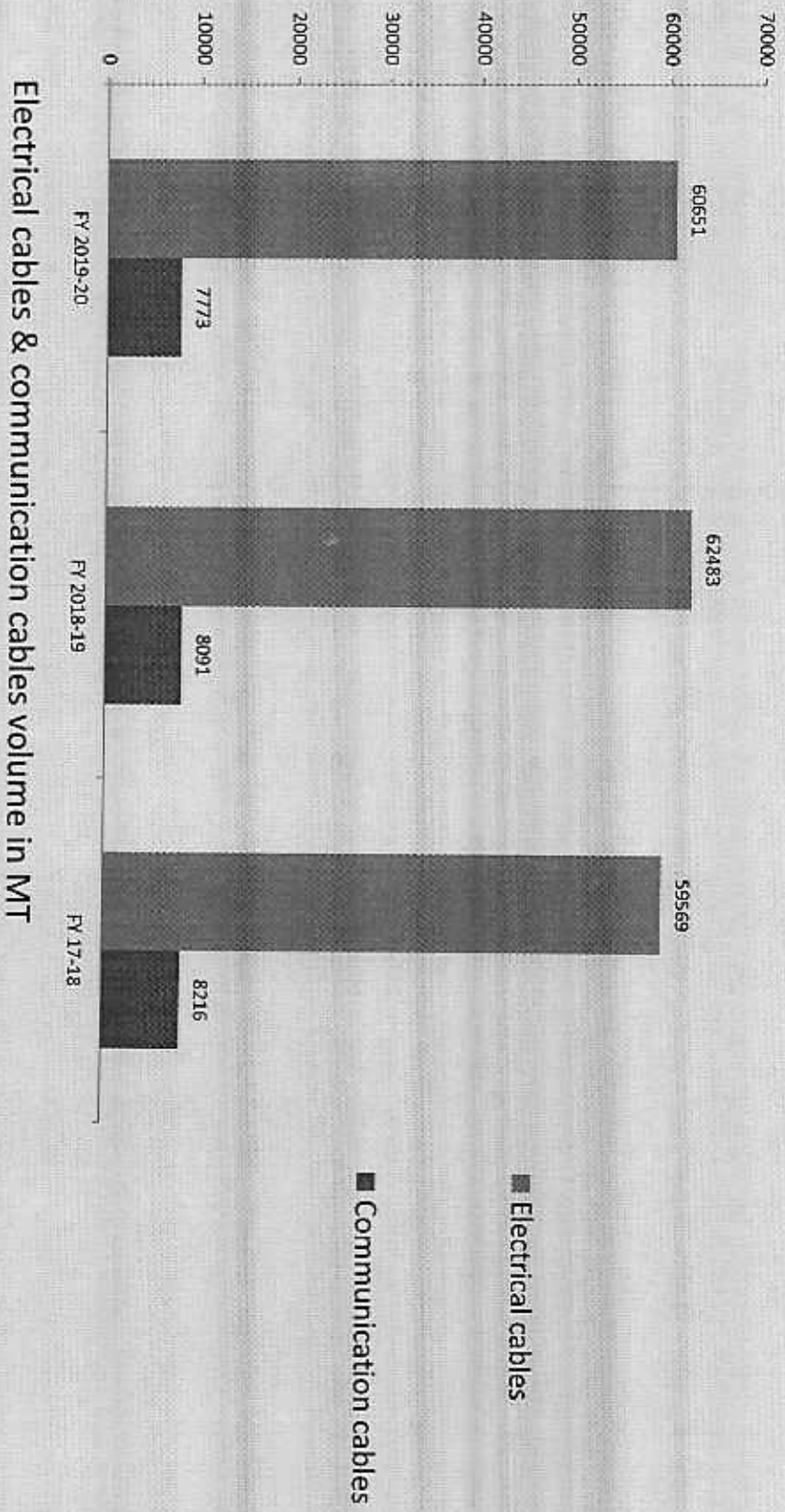


NEW LED BULB
BLISTER PACK



LED TRACK LIGHT

Business Performance Trend

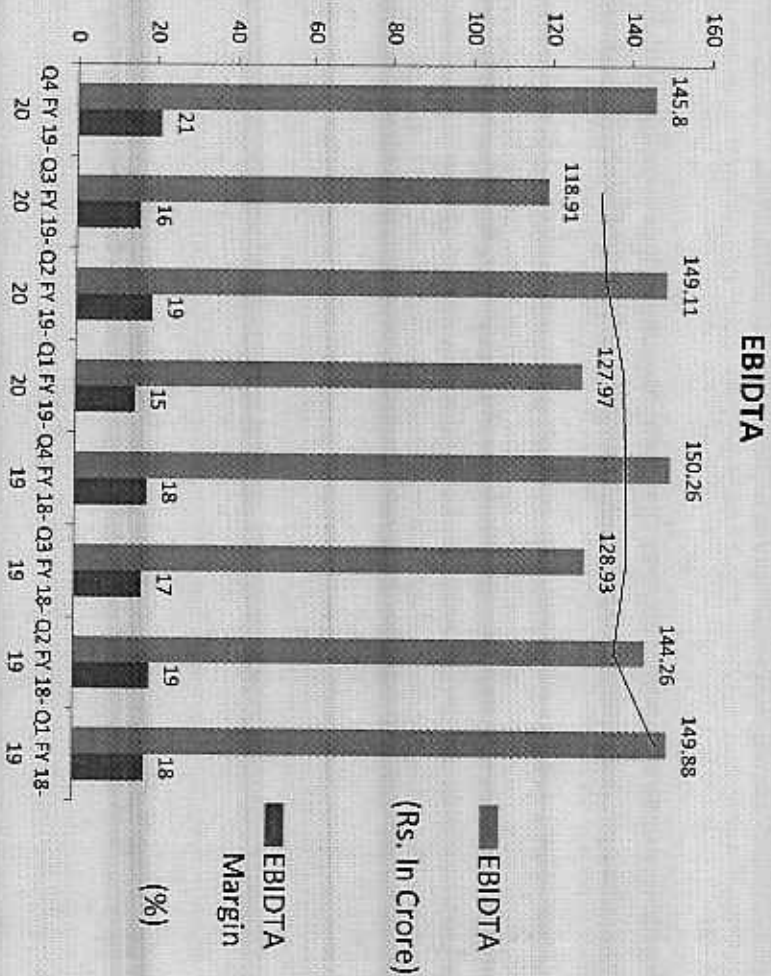
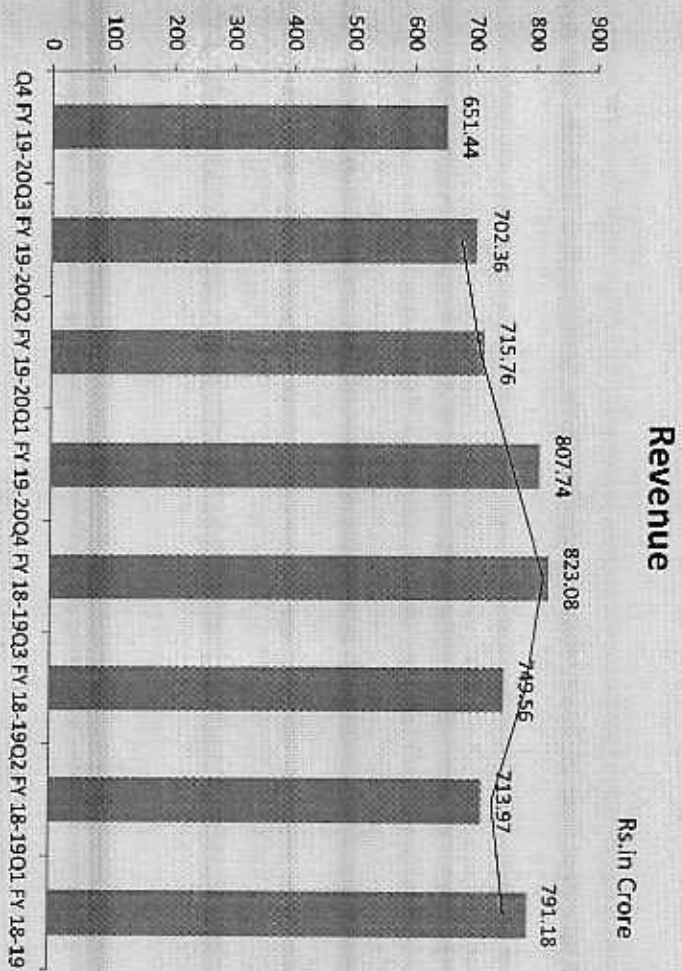


FY 2019-20
VS
FY 2018-19

Quarterly Profit & Loss- Standalone Financial Statement

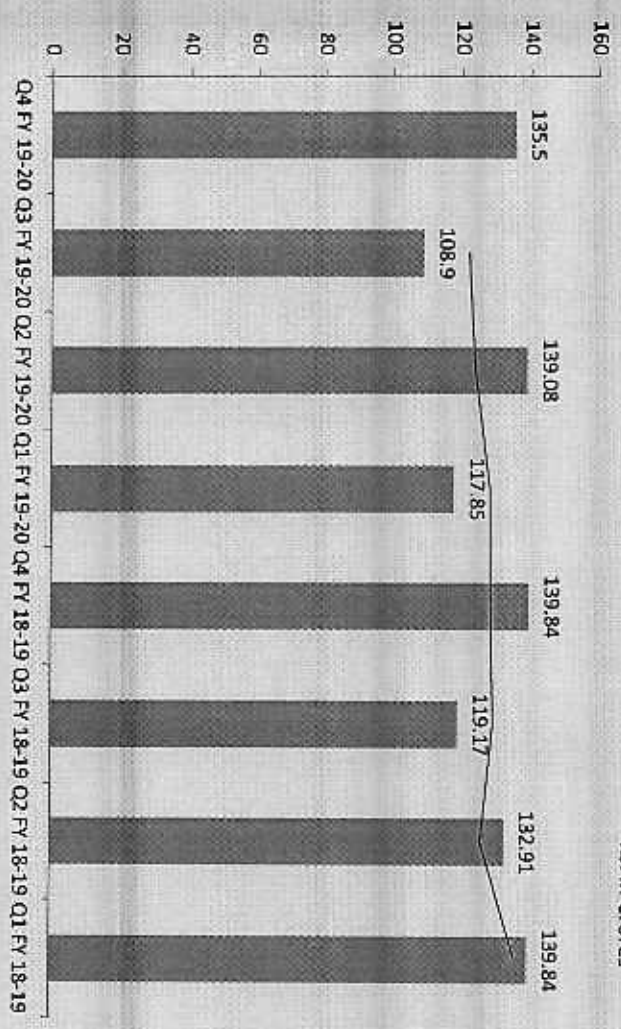
Particulars (INR in Cr)	Q4 FY 19-20	Q3 FY 19-20	Q2 FY 19-20	Q1 FY 19-20	Q4 FY 18-19	Q3 FY 18-19	Q2 FY 18-19	Q1 FY 18-19
Revenue from Operation	651.44	702.36	715.76	807.74	823.08	749.56	713.97	791.18
EBITDA	145.80	119.51	149.11	127.97	150.26	128.93	144.26	149.88
EBITDA Margins (%)	21%	16%	19%	15%	18%	17%	19%	18%
Depreciation	9.57	9.64	9.80	9.90	10.05	9.73	11.03	9.74
Other Income	58.69	26.52	64.71	21.97	23.97	19.34	58.42	20.10
Finance Cost	0.73	0.37	0.23	0.22	0.27	0.03	0.32	0.30
Profit before tax	135.50	108.90	139.08	117.85	139.94	119.17	132.91	139.84
PBT Margin	19%	14%	18%	14%	17%	15%	17%	17%
Tax	18.34	28.27	15.96	36.28	55.04	43.23	40	49.50
Profit after Tax	117.16	80.63	123.12	81.57	84.90	75.94	92.91	90.34
PAT Margin	16%	11%	16%	10%	10%	10%	12%	11%
EPS	7.66	5.27	8.05	5.33	5.55	4.97	6.07	5.91

Quarter-wise Result Summary



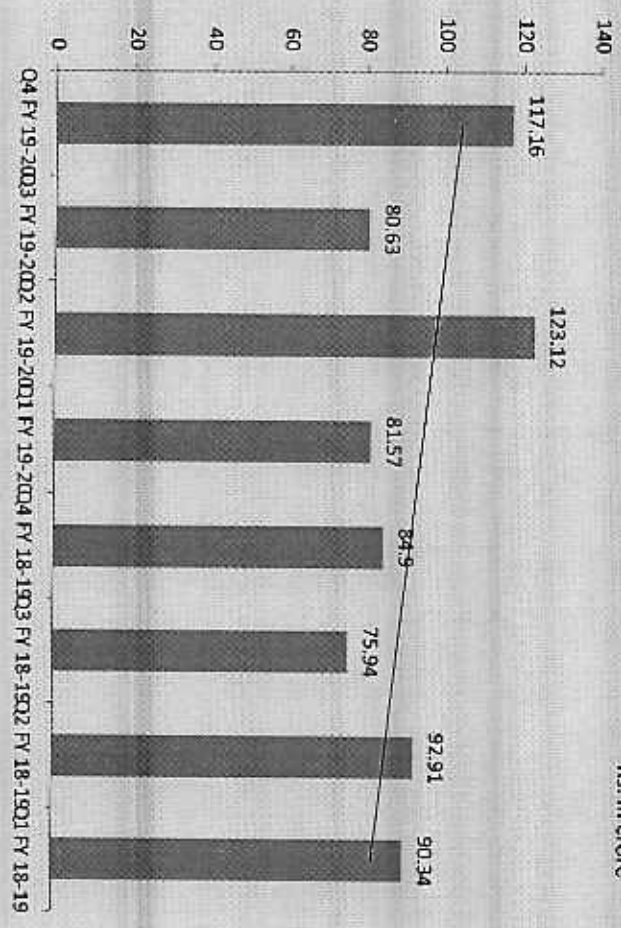
Quarter-wise Result Summary

PBT



Rs. In Crores

PAT



Rs. In Crore

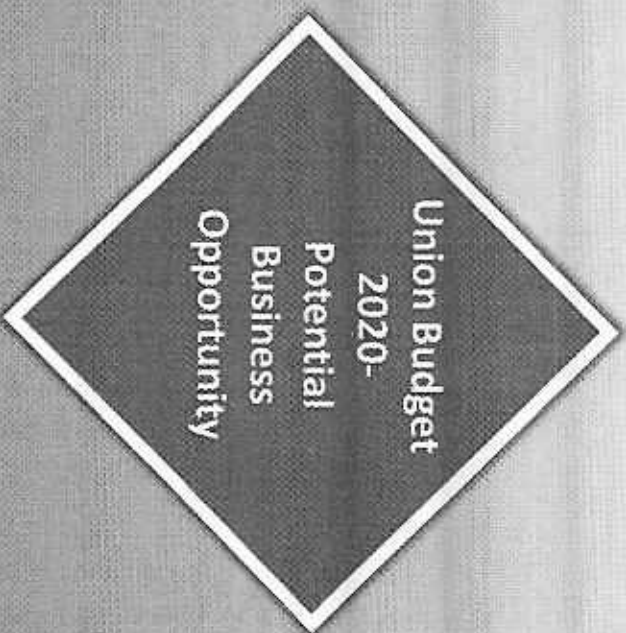
Key Indicators from FY
2012-13 to FY 2019-20

Standalone Profit & Loss Account - Key Indicators

Particulars(Rs. In Crore)	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Gross Revenue	2,447.70	2,558.30	2,633.30	2,676.50	2,770.95	3,011.63	3,199.62	3,049.19
EBIDTA	230.80	306.90	340.80	403.00	471.66	549.72	573.32	541.79
EBIDTA Margin	9%	12%	13%	15%	17%	18%	18%	18%
Profit Before Tax	170.80	244.00	263.10	336.30	419.34	504.48	531.86	501.33
PBT Margin	7%	10%	10%	13%	15%	17%	17%	16%
Profit After Tax	145.30	207.70	198.60	248.75	315.90	358.20	344.09	402.48
PAT Margin	6%	8%	8%	9%	11%	12%	11%	13%

Standalone Balance Sheet – Key Indicators

Particulars (Rs.in Crore)	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Share Capital	30.59	30.59	30.59	30.59	30.59	30.59	30.59	30.59
Reserves	893.70	1,072.80	1,234.20	1,437.00	1,846.85	2,163.31	2,409.08	2,688.04
Net Worth	924.29	1,103.39	1,264.79	1,467.59	1,877.44	2,193.90	2,439.67	2,718.63
Loan Funds	180.60	147.00	126.70	51.20	-	-	-	-
Other Liability	-	-	-	-	6.58	7.52	9.80	18.18
Deferred Tax (Net)	34.50	29.50	30.00	23.00	18.93	34.93	58.34	36.06
Total Liabilities	1,139.39	1,279.89	1,421.49	1,541.79	1,902.95	2,236.35	2,507.81	2,772.86
Gross Block	977.70	1,072.80	1,096.00	1,107.40	1,148.48	1,186.70	1,226.38	1,238.56
Net Block	460.70	507.40	470.40	424.80	414.87	414.19	414.57	404.50
Investments	324.09	403.10	494.20	619.50	895.87	1,214.82	1,381.86	725.89
Net Current Assets	314.79	304.53	443.08	475.62	558.81	530.48	665.00	786.46
Cash & Cash Equivalent	39.81	64.86	13.81	21.87	32.4	76.87	46.38	856.02
Total Assets	1,139.39	1,279.89	1,421.49	1,541.79	1,902.95	2,236.36	2,507.81	2,772.87



Union Budget direct benefits to various segments of Finolex Cables Ltd

Digitization

- Government proposed to allocate Rs 6000 Cr to Bharat Net Scheme
- Union Budget to focus on digitalization through Broadband and UPI
- One Lac Gram Panchayats to be connected through this route
- Above initiatives will increase demand for Optic Fibre Cables

Agriculture

- Government declares 16 action points, first of which is the PM Kusum scheme for push to renewable energy resources
- Barren lands can now be utilized for solar energy production
- 15 Lac pumps to be provided to farmers in order to agriculture's dependence on seasonality
- Focus on renewable energy will increase demand for solar cables.

Infrastructure

- Further expenditure for setting up of Economic Corridors with 6500 infra projects
- Increased focus of Dedicated Freight Corridors, Airports and Ports to give is expected to boost construction of housing projects
- Above initiatives will increase demand for electrical cables.

Real Estate

- Stamp duty rates increased to 10% from 5% without attracting capital gains/ Other income provisions
- Govt to focus on Affordable Housing with 8.5% increased allocation in the budget
- Govt to allocate Rs 14000 Cr for Smart Cities and AMRUT Scheme
- Urban Affairs Ministry to outlay Rs 50039.90 Cr

Power

- Concessional tax rate of 15% for new companies engaged in generation of electricity – This will create demand for power cables.

Building Atmanirbhar Bharat & Overcoming COVID -19

Business Including MSME

- Vocal for local products and make them global.
- Sanction Rs. 15000 crore for emergency health response package
- Above initiatives will increase demand for electrical cables and appliances.

Agriculture

- Rs. 30000 crore Additional Emergency working capital for farmers through NABARD
- Rs. 2 Lac Crore credit boost to farmers through Kisan Credit Card Scheme.
- Above initiatives will increase demand for cables required for agricultural sectors.

Migrant Farmers

- Liquidity support to farmers & rural economy which will lead to increase in demand of our various products.

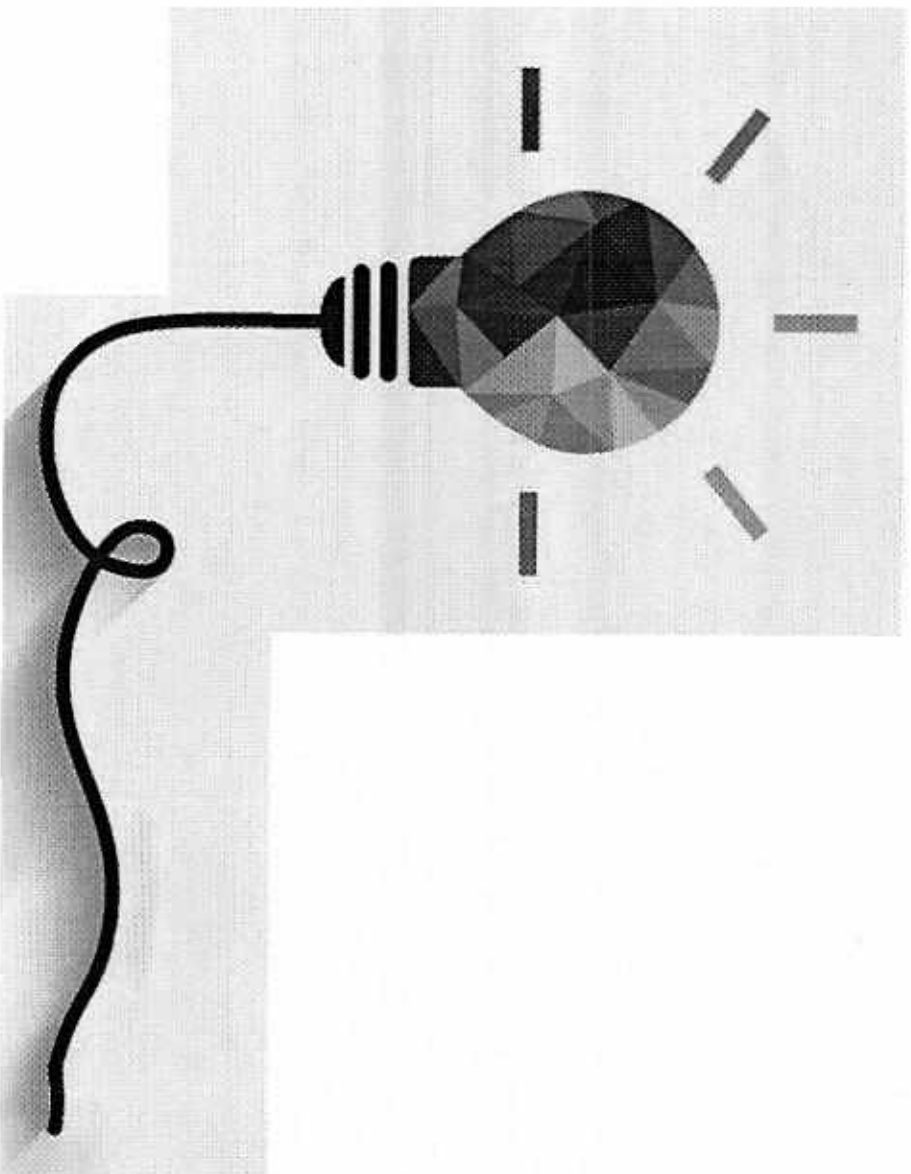
New Horizons of Growth

- Incentive schemes for promotion of New Champion Sectors will be launched in sectors such as solar PV manufacturing, advanced cell battery which will increase the demand for battery cables

Government Reforms & Enablers

- Launching of Aarogya Setu App for self assessment & contact tracing
- Databank of independent directors is launched.

Special economic and comprehensive package of Rs 20 lakh crores - equivalent to 10% of India's GDP introduced by Union Government to address post COVID -19 revival



THANK YOU