



EARNINGS PRESENTATION

Q1-FY26

A background image showing a row of white wind turbines in a green field under a blue sky with light clouds. The image is split into vertical panels by white lines.

COMPANY OVERVIEW





30+

Years of Operations



175+

Customers



750+

SKUs



Exporting to

25+

Countries



Domestic Renewal DSS
Market Share

70%



Certified by

ISO 9001:2015/ 14001:

2015/ 45001: 2018

IATF16949

Quality standards



Revenue

23%

CAGR 2021-25



EBITDA

36%

CAGR 2021-25



PAT

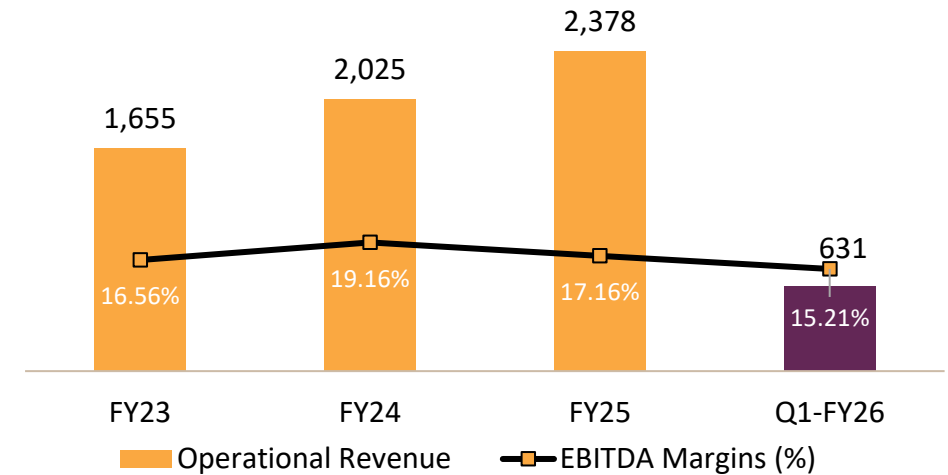
84%

CAGR 2021-25

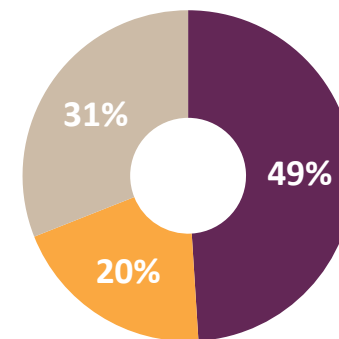
COMPANY OVERVIEW

- Gala Precision Engineering is a renowned and preferred manufacturer of precision components in India.
- The company is supported by an experienced management team and a diverse, skilled workforce, driving consistent financial growth, operational efficiency, and high levels of repeat business.
- Leading manufacturer of Special Fastening Solutions (SFS) like High Tensile Fasteners such as Studs, Anchor Bolts, Cross Bolts, Hex Bolts, Nuts, Gallock Wedge Lock and Grip Lock Washers, as well as Disc & Strip Springs (DSS) and Coil & Spiral Springs (CSS), comprising of an extensive portfolio of 750+ SKUs.
- A diversified customer profile with more than 175 customers, with key clientele including major OEMs, Tier-1 & Channel Partners across various industries like Renewable Energy, Industrials, and Mobility.
- Exporting to more than 25 countries with an office in Frankfurt, Germany, and export revenues contributing to 35% in Q1-FY26.
- State-of-the-art manufacturing facilities, complemented by in-house tool design and development capacities, offer both scalability and flexibility, providing comprehensive solutions to its clients.

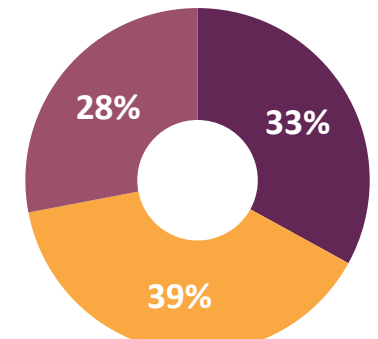
Operational Revenue & EBITDA Margins (%)



Product Break Up (Q1-FY26)



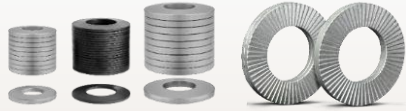

End User Industry Revenue Break Up (Q1-FY26)











■ DSS ■ CSS ■ SFS

■ Industrial ■ Renewable Energy ■ Mobility

VALUE CHAIN

RAW MATERIAL	COMPONENTS	APPLICATIONS	END-USER INDUSTRIES
 <p>Steel Sheets Steel rods</p>	 <p>DSS & WLW</p>	<p>Renewables: Yaw brakes, thrust bearing mechanism</p> <p>Industrial: Transmission lines, dampening spring, elevator safety brakes</p> <p>Mobility: Couplers and brakes</p>	<p>Renewables: Wind turbines & hydroelectric power plants</p> <p>Industrial: Electricals, heavy machinery, & off-highway vehicles</p> <p>Mobility: Automobiles & Railways</p>
 <p>Steel wires</p>	 <p>CSS</p>	<p>Industrial: Actuators</p> <p>Mobility: Transmission, brakes, seating</p>	<p>Industrial: Control valves, off-highway vehicles</p> <p>Mobility: Automobiles, commercial vehicles & railways</p>
 <p>Steel rods</p>	 <p>SFS</p>	<p>Renewables: Foundation, tower, hydroelectric plants</p> <p>Industrial: Bridges</p> <p>Mobility: Railway tracks and bridges</p>	<p>Renewables: Wind turbines, hydroelectric power plants & solar panels</p> <p>Industrial: Off-highway vehicles, heavy machinery & electricals</p> <p>Mobility: Railways</p>

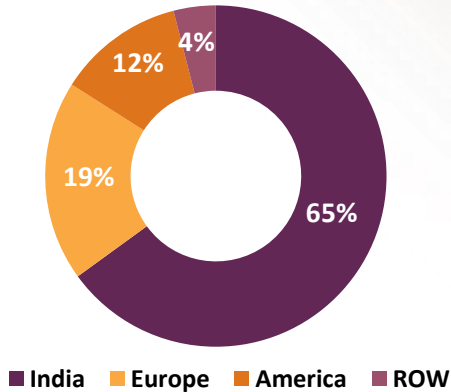
TOTAL ADDRESSABLE MARKET (TAM)

PRODUCTS	RENEWABLE ENERGY		INDUSTRIAL				MOBILITY	
	 Wind Energy	 Hydroelectric	 Off-highway	 Heavy Machinery	 Infrastructure	 Electrical	 Automotive	 Railways
DSS & WLW	●	●	●	●		●	●	●
CSS			●		●		●	●
SFS	●	●	●	●	●	●	●	●

GEOGRAPHICAL PRESENCE



Q1-FY26 Geographical Sales (%)



-  CORPORATE OFFICE
-  OFFICES
-  EXPORT COUNTRIES
-  FACTORY
-  REPRESENTATIVE

MANUFACTURING FACILITIES

FEW OF THE IN-HOUSE MANUFACTURING CAPABILITIES



Tool Design & Development



Blanking & Forming



Coiling



Heat Treatment



Shot Peening



Grinding



Thread Rolling



CNC Machining

**Manufacturing Plant at Wada, Near
Mumbai, Maharashtra**

Spread Across
(Land Area)

28,800 Sq Mtrs



VALLAM PLANT, NEAR CHENNAI, TAMIL NADU

**Upcoming Manufacturing Plant
at SIPCOT, Near Chennai, Tamil Nadu**

Spread Across
(Land Area)

6,718 Sq Mtrs



MARQUEE CLIENTS



RENEWABLE ENERGY

Vestas

GE VERNOVA

ENERCON
ENERGIE FÜR DIE WELT

SENVION
wind energy solutions

Regal Rexnord



INDUSTRIAL

Schneider Electric

LARSEN & TOUBRO

John Deere India Pvt Ltd

WÜRTH

legrand

LPS BOSSARD
Proven Productivity

BUEAB



MOBILITY

SCHAEFFLER

Wabtec
CORPORATION

HITACHI Astemo

ENDURANCE
Complete Solutions

EXEDY
RACING CLUTCH

MSL

STRATEGIC EXPANSION

RAMPING UP EXISTING CAPACITY AT WADA, NEAR MUMBAI, MAHARASHTRA



Current Installed Capacity (no's)

225,517,000

Capacity Utilization

85%



Current Installed Capacity (no's)

20,941,200

Capacity Utilization

78%



Current Installed Capacity (no's)

420,000

Capacity Utilization

70%

CAPEX FROM IPO PROCEEDS

WADA PLANT, NEAR MUMBAI, MAHARASHTRA :

₹ 111 Mn

VALLAM PLANT, NEAR CHENNAI, TAMIL NADU :

₹ 370 Mn

NEW CAPACITY AT VALLAM, NEAR CHENNAI, TAMIL NADU

Proposed Capacity

4,600 MT

Area Sq Mtrs

4,000

Vallam – Vadagal

SIPCOT



STRATEGIC LOCATION ADVANTAGE

- Customers in close proximity
- Local job work vendors
- Nearby suppliers for raw material procurement

FUTURE GROWTH STRATEGIES

01



Strengthening our core capabilities in precision engineering for sustainability

02



Moving up the value chain from niche markets to large addressable markets

03



Leverage in-house design and development capabilities to grow our product offerings and capitalize on future trends

04



Strengthen relationships with our existing customers and expand customer base

05



Expand manufacturing capacity at our existing facilities and set-up additional strategically located facility

UPDATE ON IPO PROCEEDS

Funds Proceeds

Particular	Amount (INR Mn)
Received in Monitoring account from Public Account (A)	1,212.4
Total Balance utilized for payment (Breakup given below)	671.9
FD created in HDFC Bank	485.0
FD created in Yes Bank	55.0
Interest earned	0.0
Total (B)	1,211.9
Balance in the Monitoring Account A-B	0.5

Funds Deployment

Particular	Amount to be funded from the net proceeds (INR Mn)	Amount Utilized (INR Mn)	Balance Available (INR Mn)
Loan repayment	454.3	454.3	-
Chennai CAPEX	370.0	174.0	196.0
Wada CAPEX	110.7	39.4	71.3
General Corporate Purposes	277.4	4.2	273.2
Total	1,212.4	671.9	540.5

A collage of financial-themed images including business people, dollar signs, and line graphs.

FINANCIAL OVERVIEW



Q1-FY26 FINANCIAL & OPERATIONAL HIGHLIGHTS

Q1-FY26 Financial Performance

Revenue from Operations INR 631 Mn	EBITDA INR 96 Mn	EBITDA Margin 15.21%
PAT INR 65 Mn	PAT Margin 10.30%	Diluted EPS INR 5.02

Operational Highlights

- Revenue for the quarter was impacted by a forex rate increase in the Euro, resulting in a gain of INR 12 Mn. This led to a 0.8% reduction in the raw material cost ratio
- The improvement in the Gross Margin was partly supported by a 0.9% benefit from GIT (Goods-in-Transit), with the remaining improvement driven by a product mix
- EBITDA for the quarter was impacted by higher other expenses, with a forward contract loss of INR 19.4 Mn (impacting margins by 3.08%) and additional costs related to freight outward, power, conveyance, CSR, and others amounting to INR 9.7 Mn (impacting margins by 1.56%)
- Order book for the quarter stood at INR 699 Mn
- Net profit for Q1-FY26 grew 3% YoY, reaching INR 65 Mn
- SFS (Fastener Business) reported a strong 64% QoQ growth, rising from INR 118 Mn to INR 195 Mn
- Customer audits were completed at the Chennai plant by multiple clients
- Commercial production at Chennai plant started in July 2025, and dispatches will commence in August 2025
- Sales started to industrial customers for the SFS business from the Wada plant

QUARTERLY CONSOLIDATED STATEMENT OF PROFIT & LOSS

Particulars (INR Mn)	Q1-FY26	Q1-FY25	Y-O-Y	Q4-FY25	Q-O-Q
Revenue from Operations	631	532	18.6%	753	(16.2)%
Total Expenses	535	423	26.5%	625	(14.4)%
EBITDA	96	109	(11.9)%	128	(25.0)%
EBITDA Margin (%)	15.21%	20.49%	(528) Bps	17.00%	(179) Bps
Other Income	14	6	NA	15	(6.7)%
Depreciation	22	19	15.8%	21	4.8%
Finance Cost	6	13	(53.8)%	9	(33.3)%
Profit before Exceptional Items and Tax	82	83	(1.2)%	113	(27.4)%
Exceptional Items (Net)	-	-	NA	-	NA
PBT	82	83	(1.2)%	113	(27.4)%
Tax	17	20	(15.0)%	13	30.8%
Non – Controlling Interest	-	-	NA	-	NA
PAT before Exceptional Item	65	63	3.2%	100	(35.0)%
PAT Margin before Exceptional Item (%)	10.30%	11.84%	(154) Bps	13.28%	(298) Bps
PAT after Exceptional Item	65	63	3.2%	100	(35.0)%
PAT Margin after Exceptional Item (%)	10.30%	11.84%	(154) Bps	13.28%	(298) Bps
Other Comprehensive Income	(1)	(1)	NA	(5)	(80.0)%
Total Comprehensive Income	64	62	3.2%	95	(32.6)%
EPS (INR)(not annualised)	5.02	6.14	(18.2)%	8.41	(40.3)%

HISTORICAL CONSOLIDATED STATEMENT OF PROFIT & LOSS

Particulars (INR Mn)	FY23	FY24	FY25
Revenue from Operations	1,655	2,025	2,378
Total Expenses	1,381	1,637	1,970
EBITDA	274	388	408
EBITDA Margin (%)	16.56%	19.16%	17.16%
Other Income	16	18	44
Depreciation	61	69	80
Finance Cost	52	61	38
Profit before Exceptional Items and Tax	177	276	334
Exceptional Items (Net)	98	(23)	(3)
PBT	275	253	331
Tax	33	33	63
Non – Controlling Interest	-	(3)	-
PAT before Exceptional Item	144	246	271
PAT Margin before Exceptional Item (%)	8.70%	12.15%	11.40%
PAT after Exceptional Item	242	223	268
PAT Margin after Exceptional Item (%)	14.62%	11.01%	11.27%
Other Comprehensive Income	2	5	(4)
Total Comprehensive Income	244	228	264
EPS (INR)(not annualised)	23.56	21.77	22.56

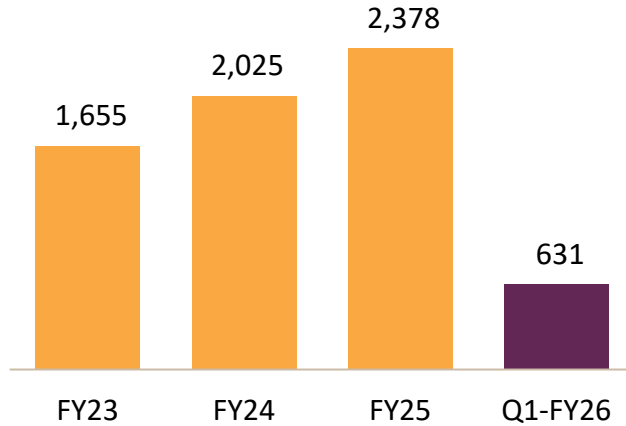
HISTORICAL CONSOLIDATED BALANCE SHEET

Particulars (INR Mn)	FY22	FY23	FY24	FY25
EQUITY AND LIABILITIES				
Equity				
Equity Share Capital	25	25	101	127
Other Equity	568	811	947	2440
Non Controlling Interest	-	-	(3)	(4)
Total Equity	593	837	1,045	2,563
LIABILITIES				
Non-Current Liabilities				
Financial Liabilities				
-Borrowings	238	205	92	11
- Lease liabilities	-	15	11	7
- Other Financial Liabilities				
Provisions	40	46	54	69
Deferred Tax Liabilities (Net)	21	37	9	5
Current Liabilities				
Financial Liabilities				
- Borrowings	331	381	458	220
- Lease liabilities	-	3	3	4
- Trade Payables				
(A) total outstanding dues of micro & small enterprises	3	7	3	8
(B) total outstanding dues other than micro & small enterprises	135	74	133	175
- Other Financial Liabilities	57	84	38	70
Other Current Liabilities	12	9	36	58
Provisions	10	6	5	7
Current Tax Liabilities (Net)	17	-	-	
Total Liabilities	863	867	842	634
Total Equity And Liabilities	1,456	1,704	1,887	3,197

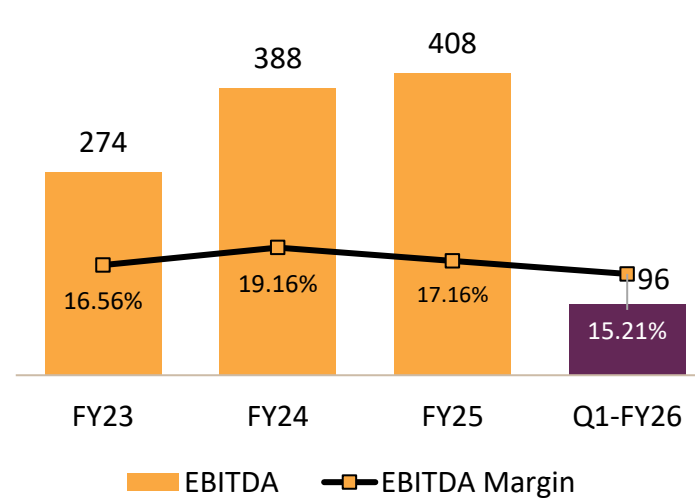
Particulars (INR Mn)	FY22	FY23	FY24	FY25
ASSETS				
Non-Current Assets				
Property, Plant and Equipment	384	382	413	607
Right of use assets	11	50	45	41
Capital Work-in-Progress	1	13	32	66
Investment Property	-	-	-	-
Goodwill	-	-	-	-
Other Intangible Assets	168	177	186	189
Intangible assets under development	29	35	33	39
Other Financial Assets	6	9	11	57
Non-Current Tax assets (net)	1	11	7	13
Other non-current assets	4	7	17	44
Current Assets				
Inventories	497	558	577	724
Financial Assets				
- Trade Receivables	255	300	470	709
- Cash and cash Equivalents	5	5	14	15
- Bank balances other than cash and cash equivalents	21	115	27	579
- Loans	3	6	1	3
- Others financial assets	21	4	17	23
Other current assets	48	34	37	88
TOTAL ASSETS	1,456	1,704	1,887	3,197

FINANCIAL PERFORMANCE

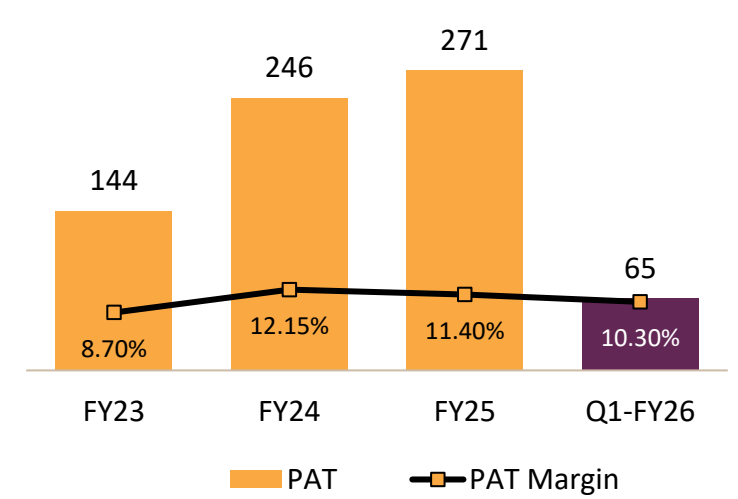
Revenue from Operations (INR Mn)



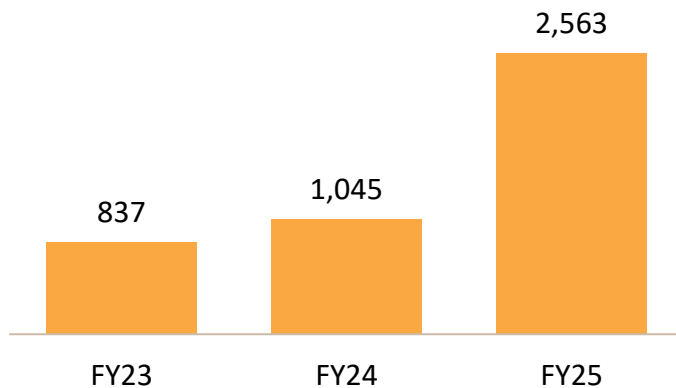
EBITDA (INR Mn) & EBITDA Margins %



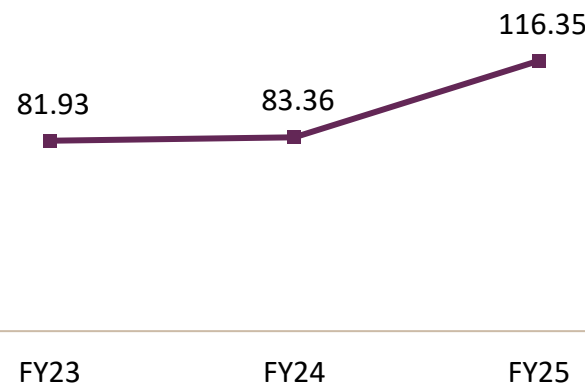
PAT (INR Mn) & PAT Margins % *



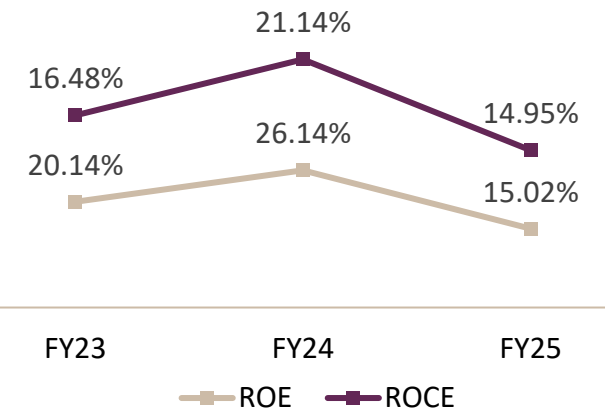
Net Worth (INR Mn)



Working Capital Days

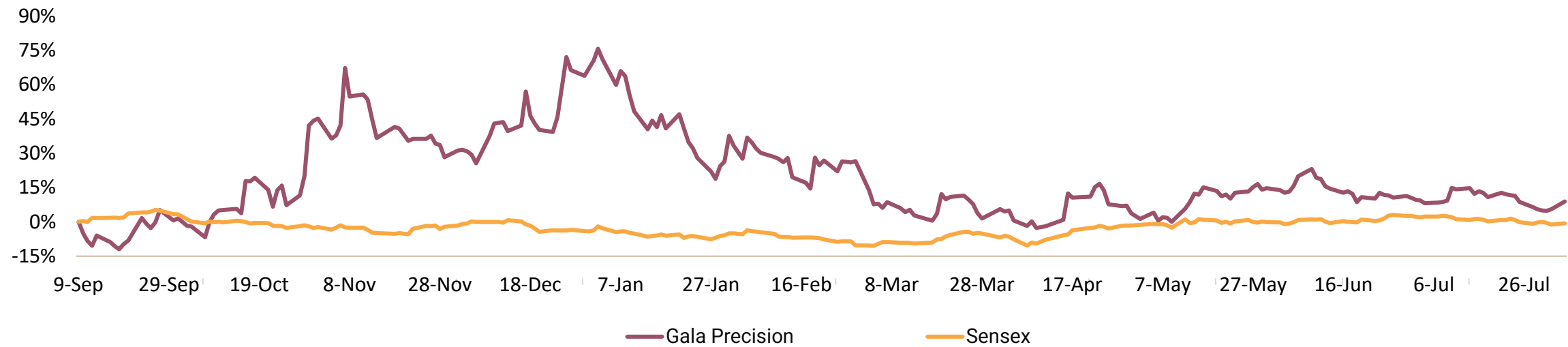


ROE* & ROCE %



* - PAT, PAT margins & ROE calculations excludes exceptional items

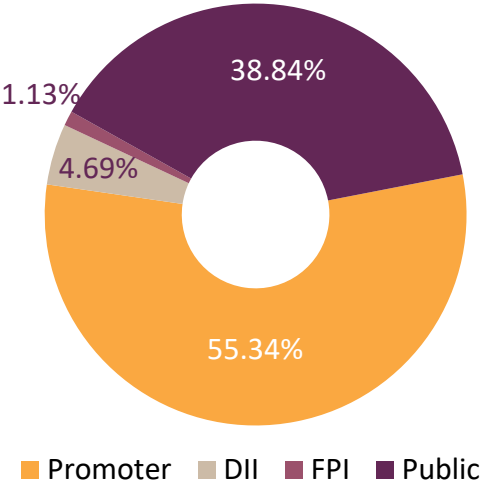
11 Month Stock Performance (up to 4th August, 2025)



Market Data (As on 4th August, 2025)

Particulars	INR
Face Value	10.00
CMP	856.85
52 Week H/L	1,480.80 / 685.60
Market Capitalization (Mn)	10,895.21
Shares O/S (Mn)	12.72

Shareholding Pattern (As on 30th June, 2025)



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THANK YOU



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