



Talbro's Automotive  
Components Ltd.

www.talbro's.com

7<sup>th</sup> August, 2025

Listing Department <b>BSE Limited</b> Phiroze Jeejeebhoy Towers Dalal Street Mumbai – 400 001  <b>Scrip Code: 505160</b>	Listing Department <b>National Stock Exchange of India Limited</b> Exchange Plaza, Plot No. C-1, G Block Bandra Kurla Complex, Bandra (East) Mumbai – 400 051  <b>Symbol: TALBROAUTO</b>
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**Sub: Q1 FY26 Investor Presentation**

Dear Sir/ Madam,

Pursuant to Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, we enclose herewith Q1 FY26 Investor Presentation.

The Investor Presentation will also be available on the website of the Company at <https://www.talbro's.com>.

This is for your information and records.

Thanking you,

Yours Sincerely

For Talbro's Automotive Components Limited

Seema Narang  
Company Secretary & Compliance Officer



Encl: as above



Driving Future Leadership

# **Q1 FY26 INVESTOR PRESENTATION**

August 2025



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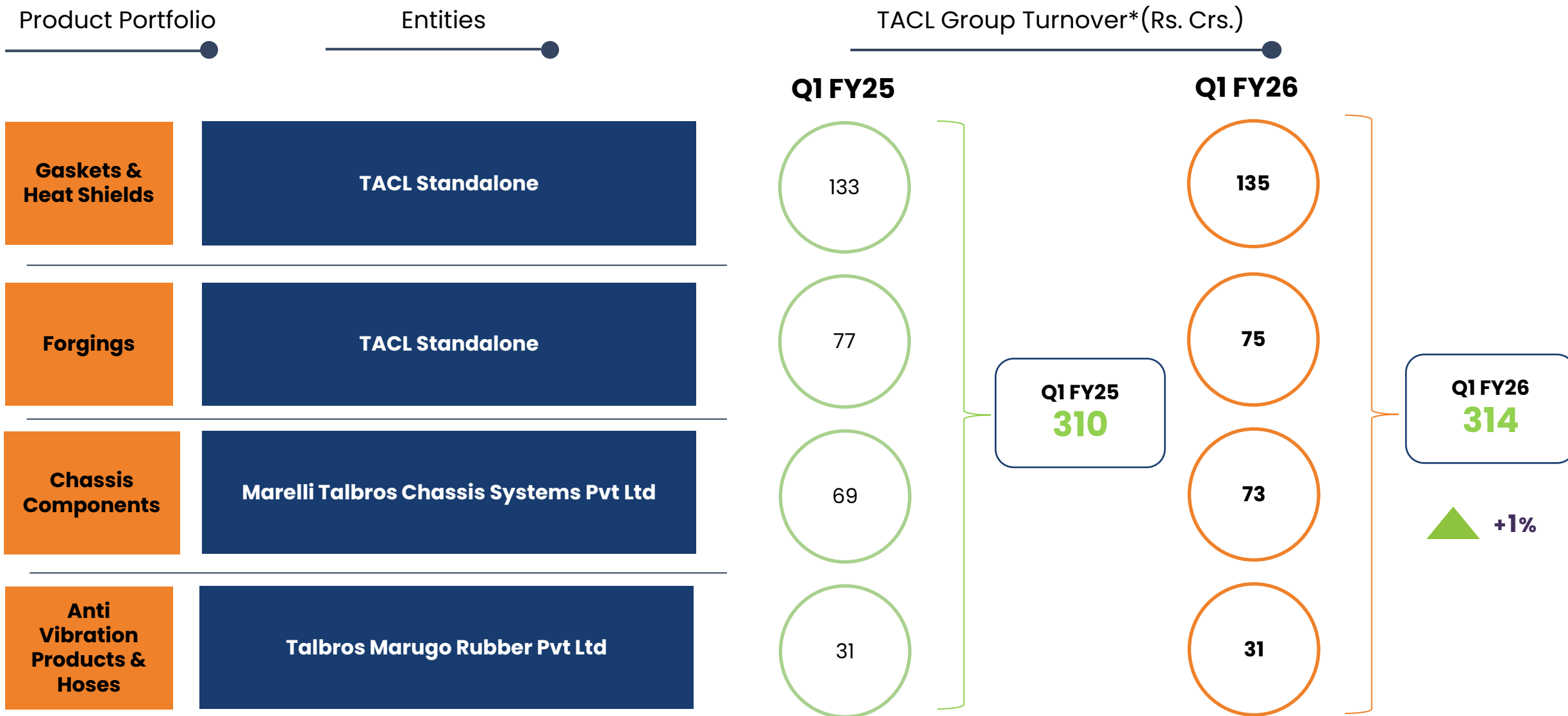
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# TALBROS AUTOMOTIVE COMPONENTS LTD (TACL) - GROUP

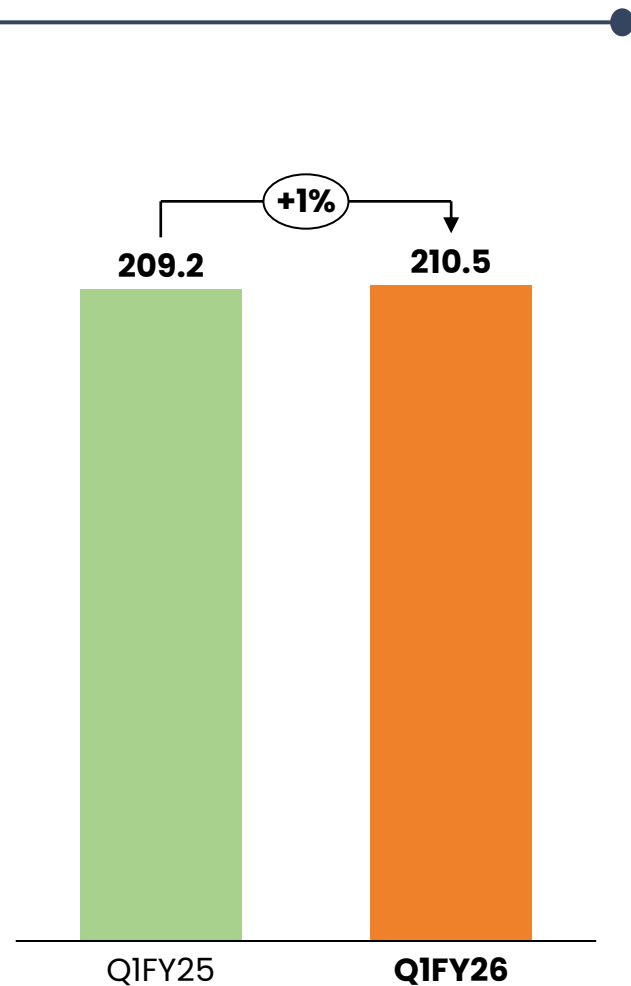




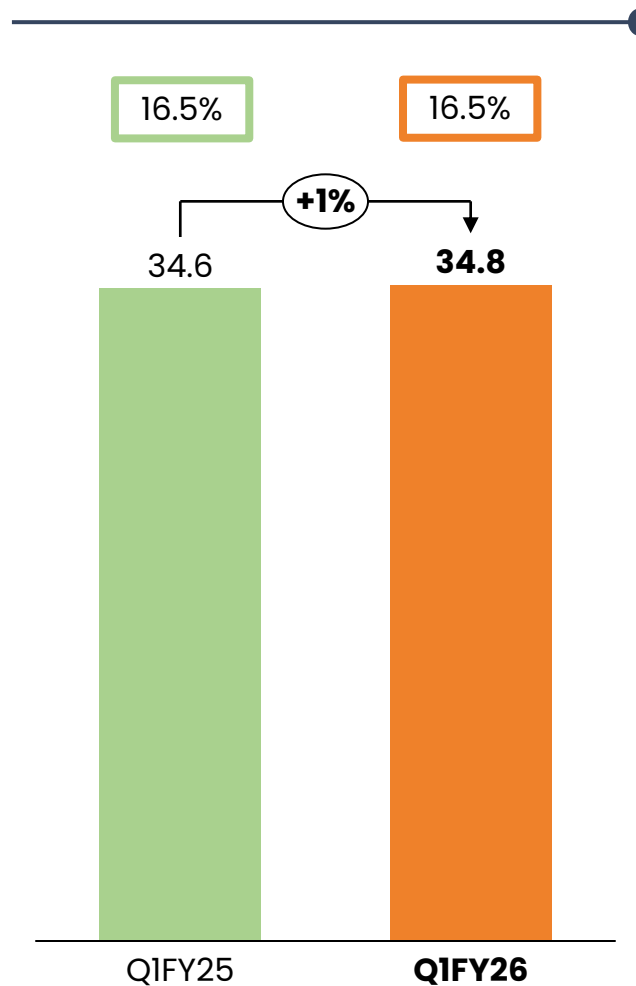
# Q1 FY26 CONSOLIDATED PERFORMANCE HIGHLIGHTS



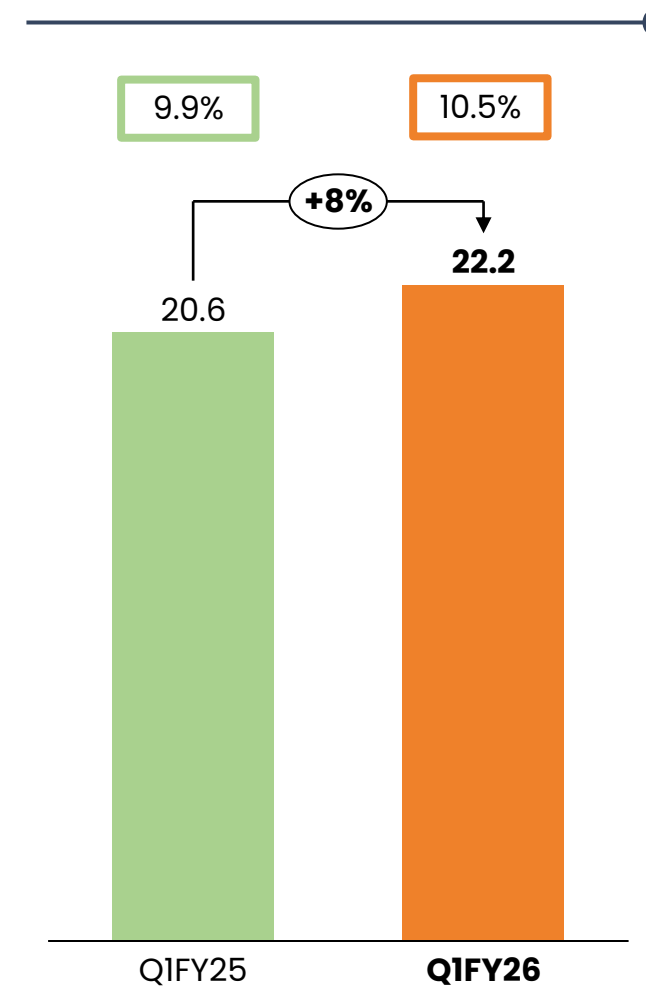
Total Income from Operations<sup>^</sup>



EBITDA<sup>^</sup>



Profit After Tax





# Q1 FY26 CONSOLIDATED PERFORMANCE HIGHLIGHTS



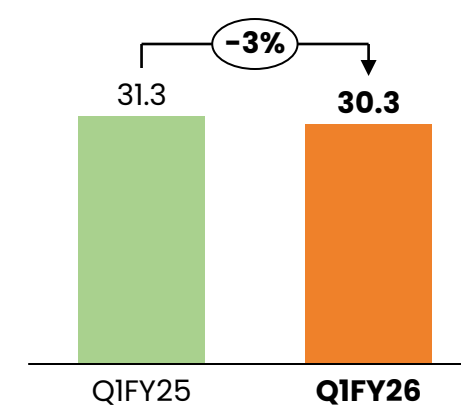
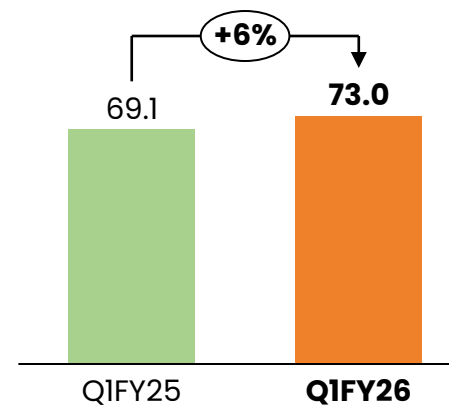
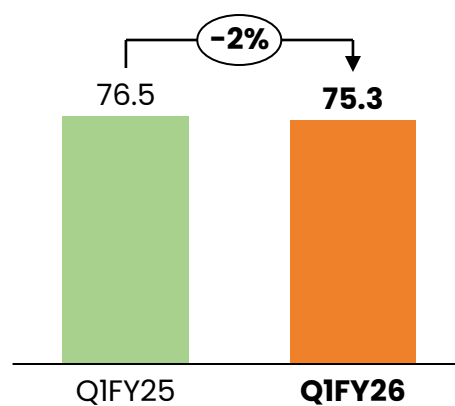
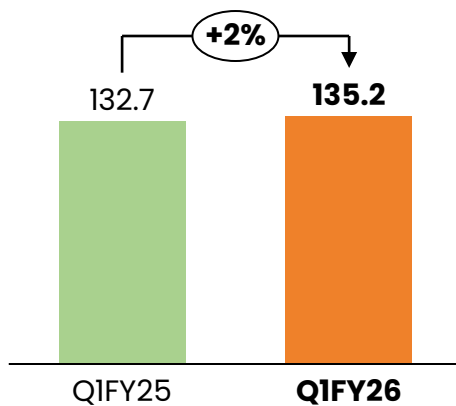
## Gasket & Heat Shield

## Forgings

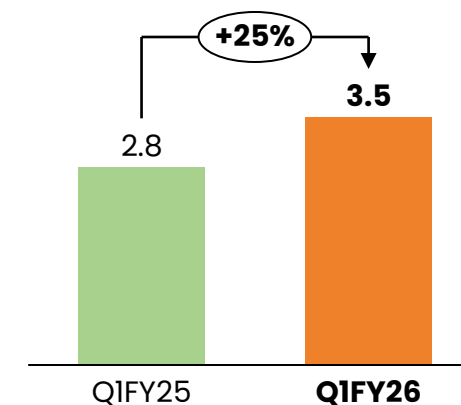
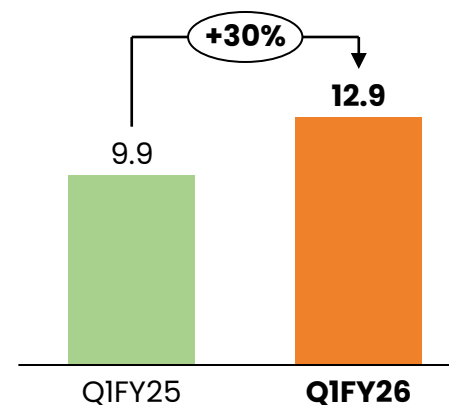
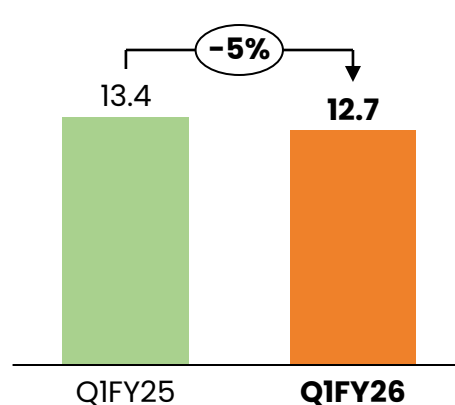
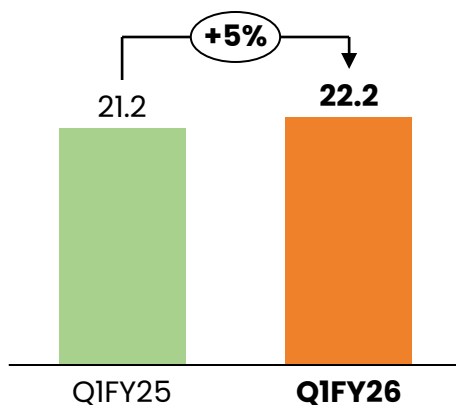
## MTCS

## TMR

Revenues



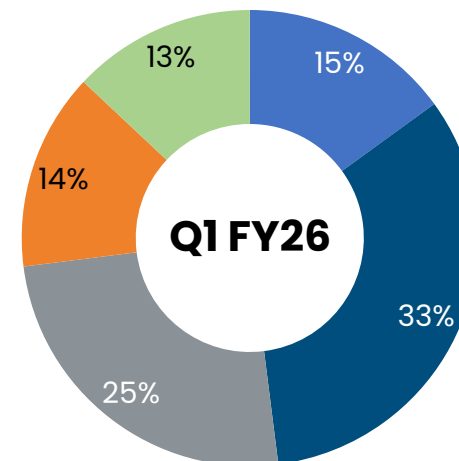
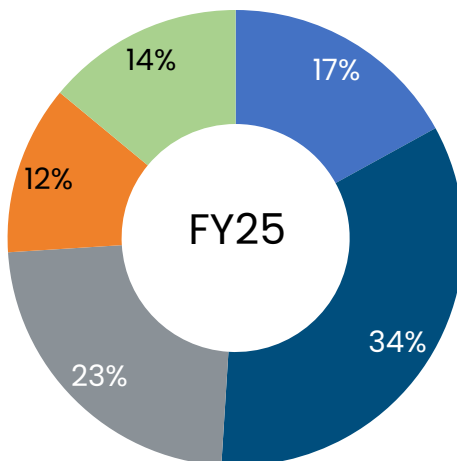
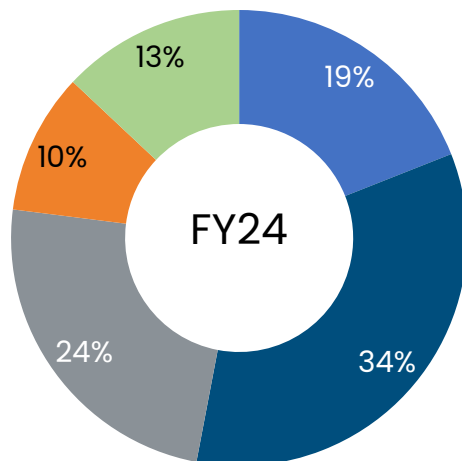
EBITDA





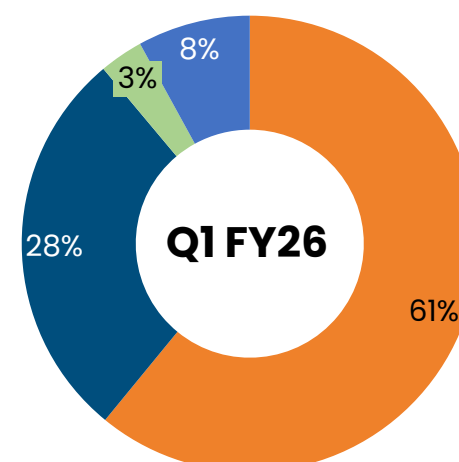
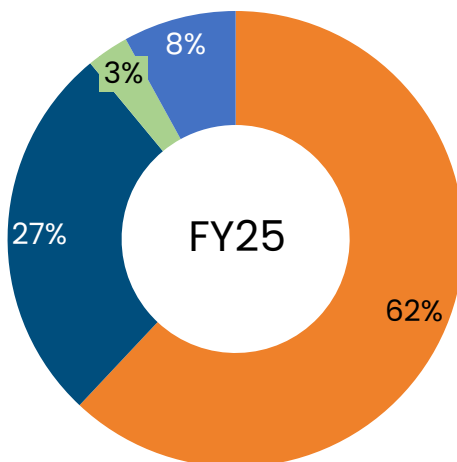
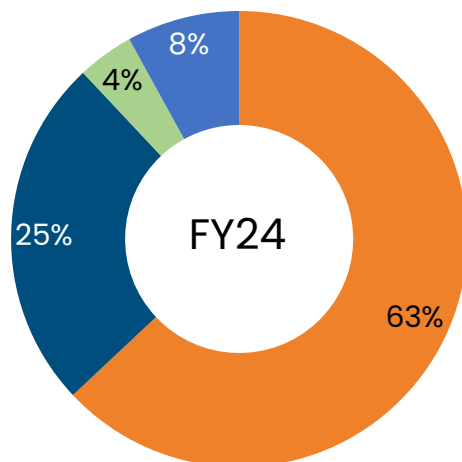
# REVENUES SPREAD ACROSS VARIED SEGMENTS

Domestic Breakup\*



- 2 & 3 Wheelers
- Passenger Vehicle
- HCV & LCV
- Agri & Off Loaders
- Others

Breakup (Type of Market)\*

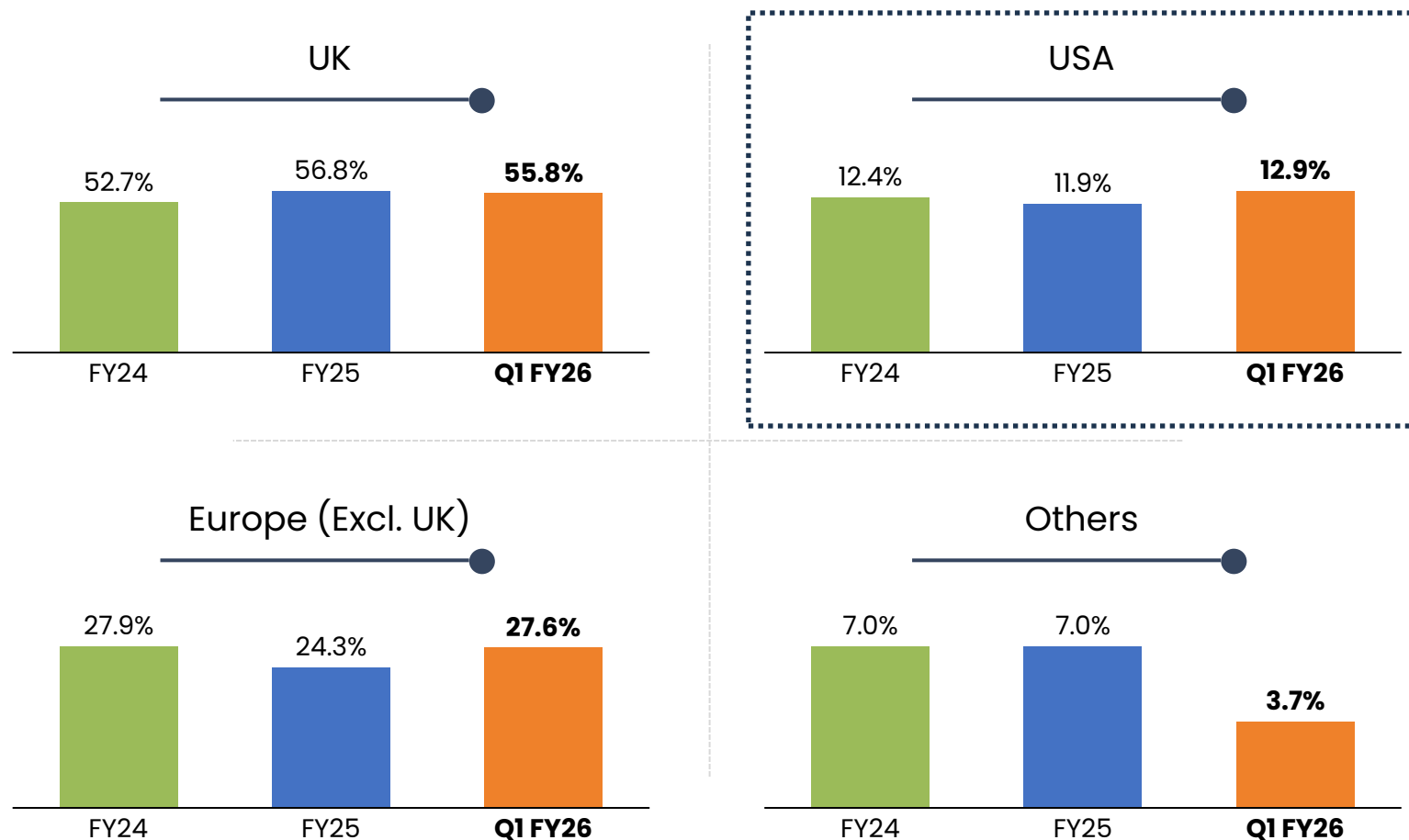


- OEM
- Exports
- After Market
- Others





## Region Wise Export Revenue Contribution %



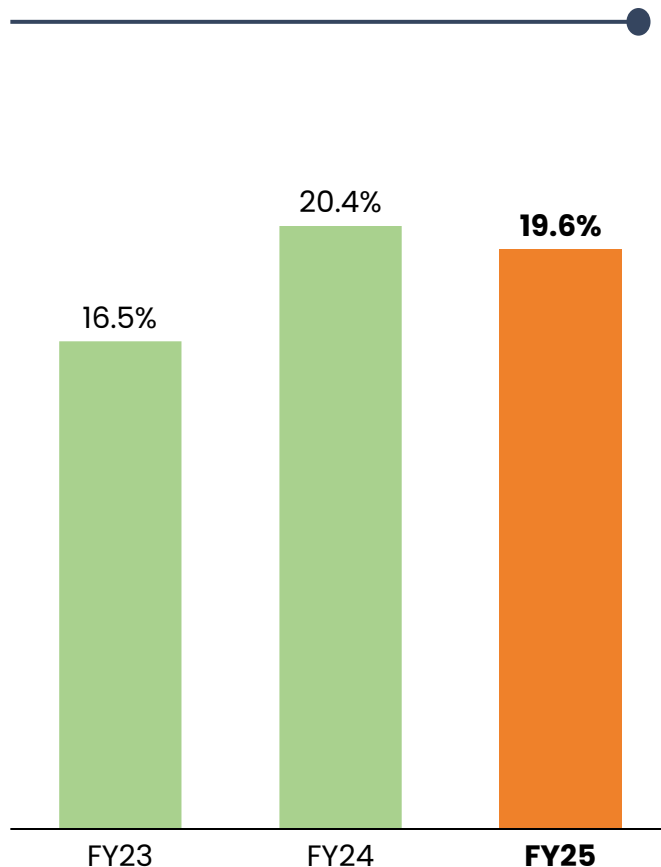
- ✓ Revenue from USA Region have remained stable over the last two years **(12.9% of export revenue; only 3.3% of overall revenues)**, and we do not anticipate any material impact from tariffs. This is because the Company supplies critical engine gaskets – components that are deeply integrated into OEM engine designs and have limited substitution potential
- ✓ Export momentum from UK region is continuously , with forged components such as crankshafts and control arms driving growth amid rising demand for high-strength parts in European markets



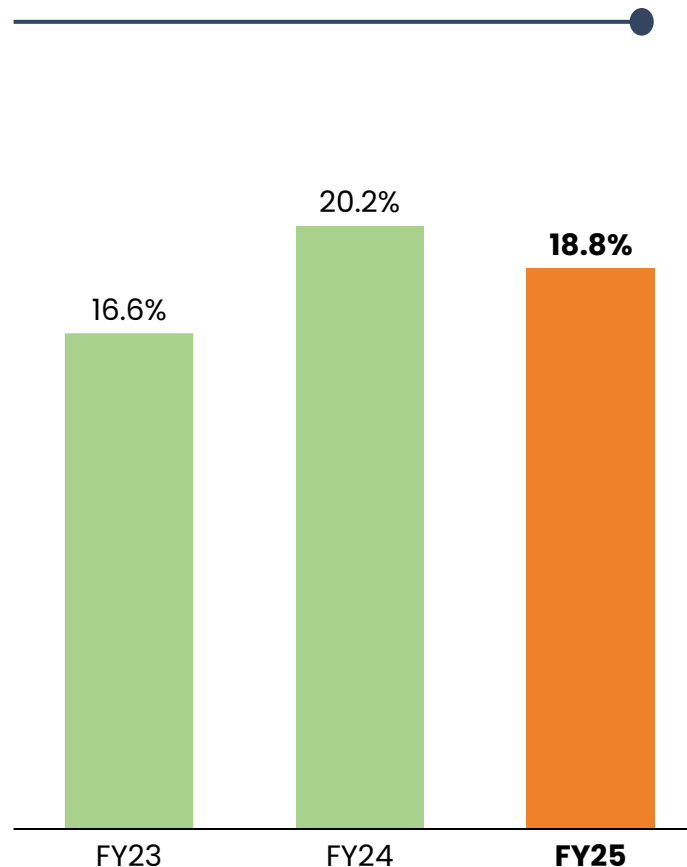


# STRONG BALANCE SHEET

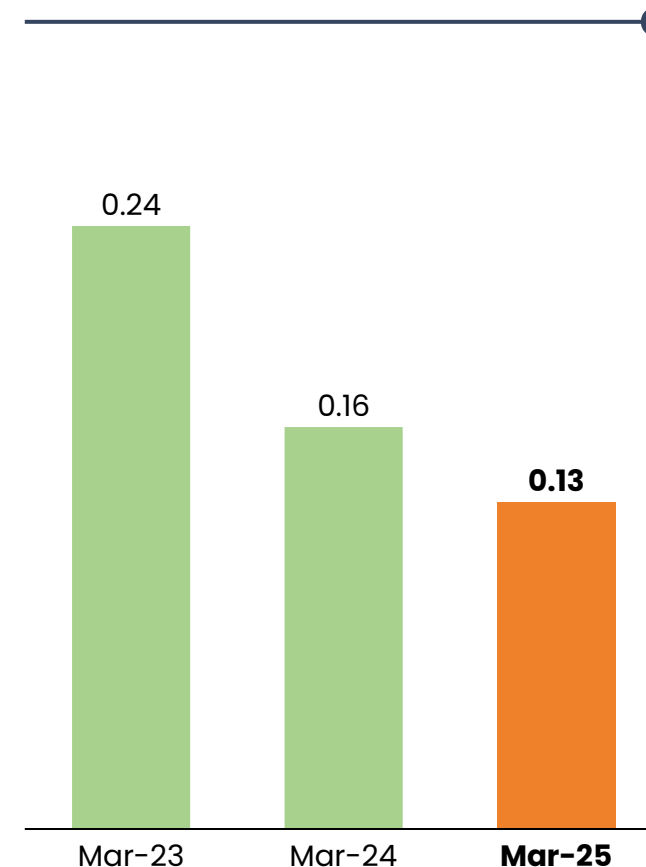
Return on Capital Employed (RoCE)



Return on Equity (RoE)



Debt / Equity





# NEW MULTI YEAR ORDERS SECURED IN FY25 & FY26



## Execution of Below Order Book to be implemented from FY26

### November 2024

Received new multi years orders worth ~Rs. **475** crores from both, domestic and overseas customers across its business divisions, product segments and JVs. These orders are to be executed over a period of **next 5 years** commencing from FY25 onwards covering the company's product lines – gaskets, heat-shields, forgings, chassis and rubber hoses.

- ✓ Includes Export Orders of ~Rs. 145 crores
- ✓ Includes multiple EV Orders for ~Rs. 75 crores from leading OEMs



### June 2025

Received new multi years orders worth ~Rs. **580** crores from both, domestic and overseas customers across its business divisions, product segments and JVs. These orders are to be executed over a period of **next 5 years** commencing from FY26 onwards covering the company's product lines – gaskets, heat-shields, forgings, chassis and rubber hoses.

- ✓ Includes order worth ~Rs. 160 crores for EV segment
- ✓ Includes order worth ~Rs. 150 crores for Exports



- ✓ In FY25, the Company had secured orders worth Rs. 1,475 crores. In FY26, the Company has further strengthened its order book with significant new order worth Rs. 580 crores, with execution already underway for select projects
- ✓ This shift from order acquisition to execution marks a crucial milestone, driving revenue generation and reinforcing the growth trajectory. Secured from leading OEMs across domestic and export markets, these orders reflect the strong market confidence in TACL and its joint ventures



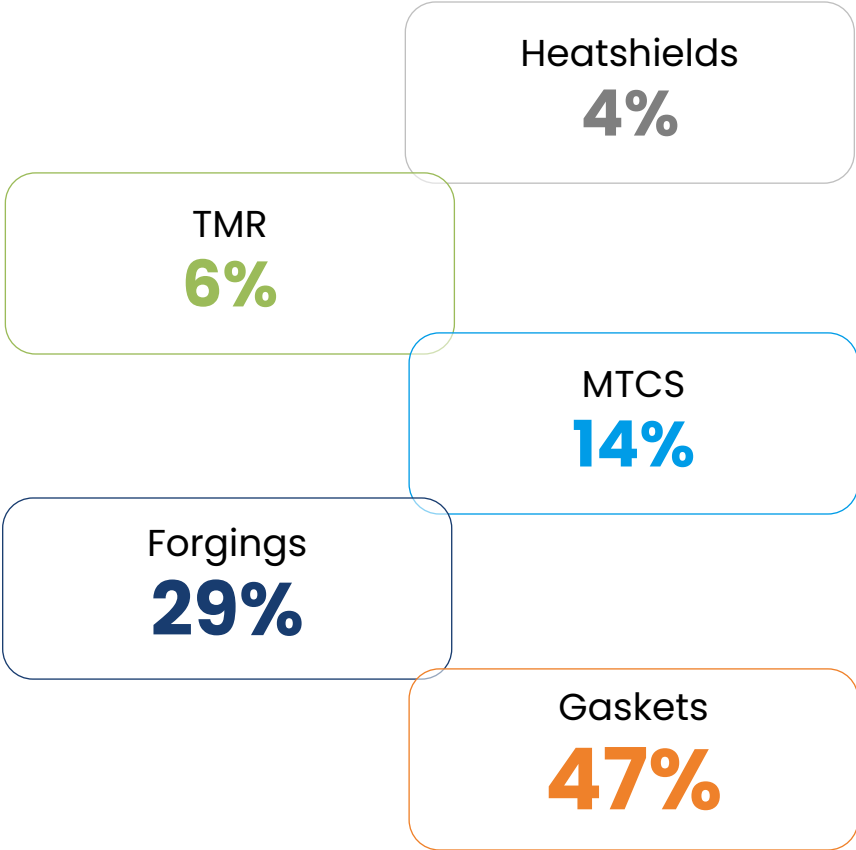
# Q1 FY26 CONSOLIDATED PROFIT & LOSS STATEMENT



Particulars (Rs. In crores)	Q1 FY26	Q1 FY25	Y-o-Y
<b>Revenue from Operations</b>	<b>206.8</b>	<b>204.3</b>	<b>1%</b>
Other Income	3.8	4.9	
<b>Total Revenue from Operation</b>	<b>210.5</b>	<b>209.2</b>	<b>1%</b>
Raw Material	108.1	111.5	
Employee Cost	24.3	23.4	
Other Expenses	43.3	39.7	
<b>EBITDA</b>	<b>34.8</b>	<b>34.6</b>	<b>1%</b>
<b>EBITDA Margin</b>	<b>16.5%</b>	<b>16.5%</b>	
Depreciation	7.6	7.9	
<b>EBIT</b>	<b>27.3</b>	<b>26.7</b>	<b>2%</b>
<b>EBIT Margin</b>	<b>12.9%</b>	<b>12.8%</b>	
Finance cost	3.3	3.3	
Share of Profit from JVs	4.0	3.0	
<b>Profit before Tax (Before Exceptional Items)</b>	<b>27.9</b>	<b>26.4</b>	<b>6%</b>
Tax	5.7	5.8	
<b>Profit After Tax (Before Exceptional Items)</b>	<b>22.2</b>	<b>20.6</b>	<b>8%</b>
<b>PAT Margin %</b>	<b>10.5%</b>	<b>9.9%</b>	



Q1 FY26 – Revenue Contribution



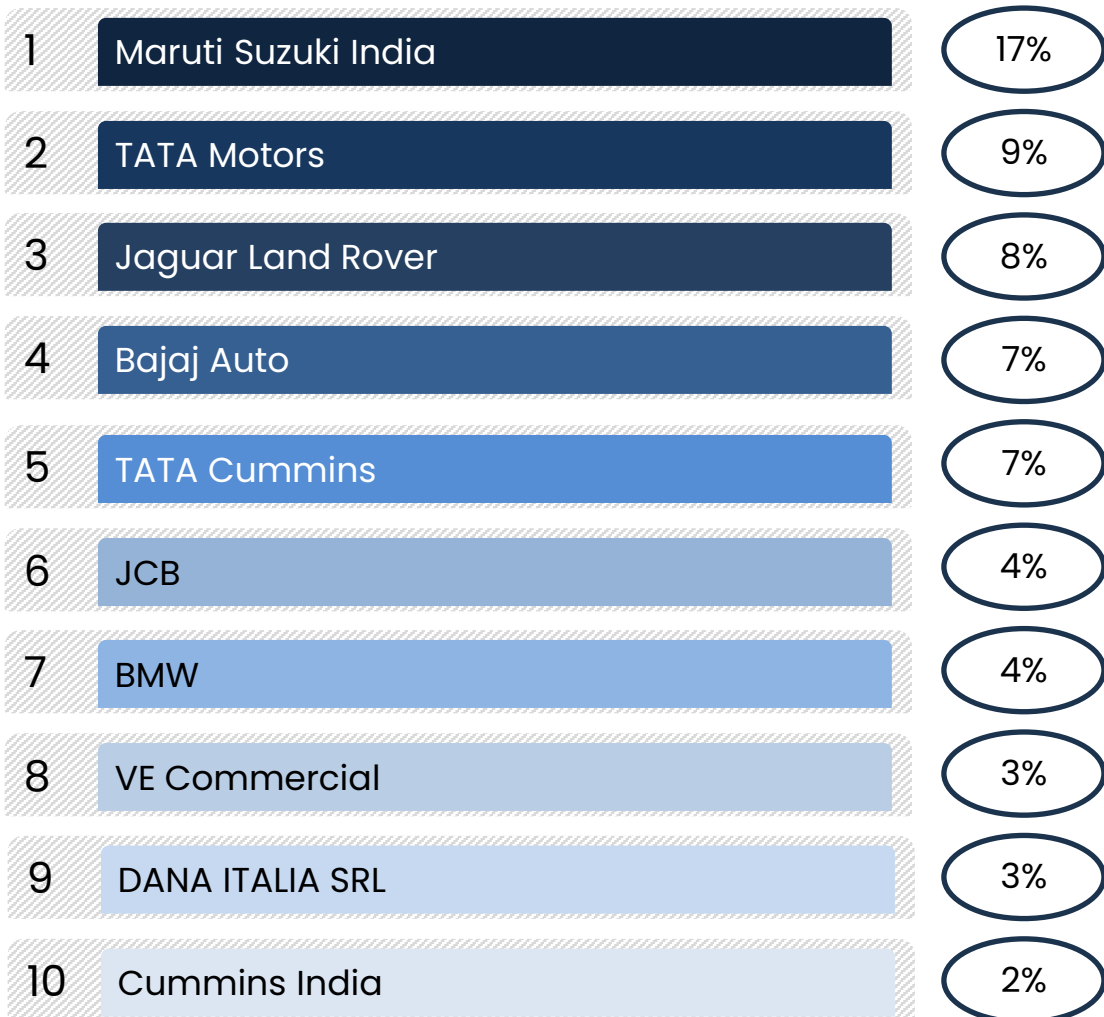
Segments	Product Portfolio	Market Exposure
<ul style="list-style-type: none"><li>2 Wheelers</li><li>3Wheelers</li><li>Passenger Vehicles</li><li>Commercial Vehicles</li><li>Agri / Off-Loaders and Industrial</li></ul>	<ul style="list-style-type: none"><li>Gaskets</li><li>Heat Shields</li><li>Forgings</li><li>Chassis Systems</li><li>Anti vibration</li><li>Hoses</li></ul>	<ul style="list-style-type: none"><li>OEMs</li><li>After Market</li><li>Exports</li><li>Others</li></ul>



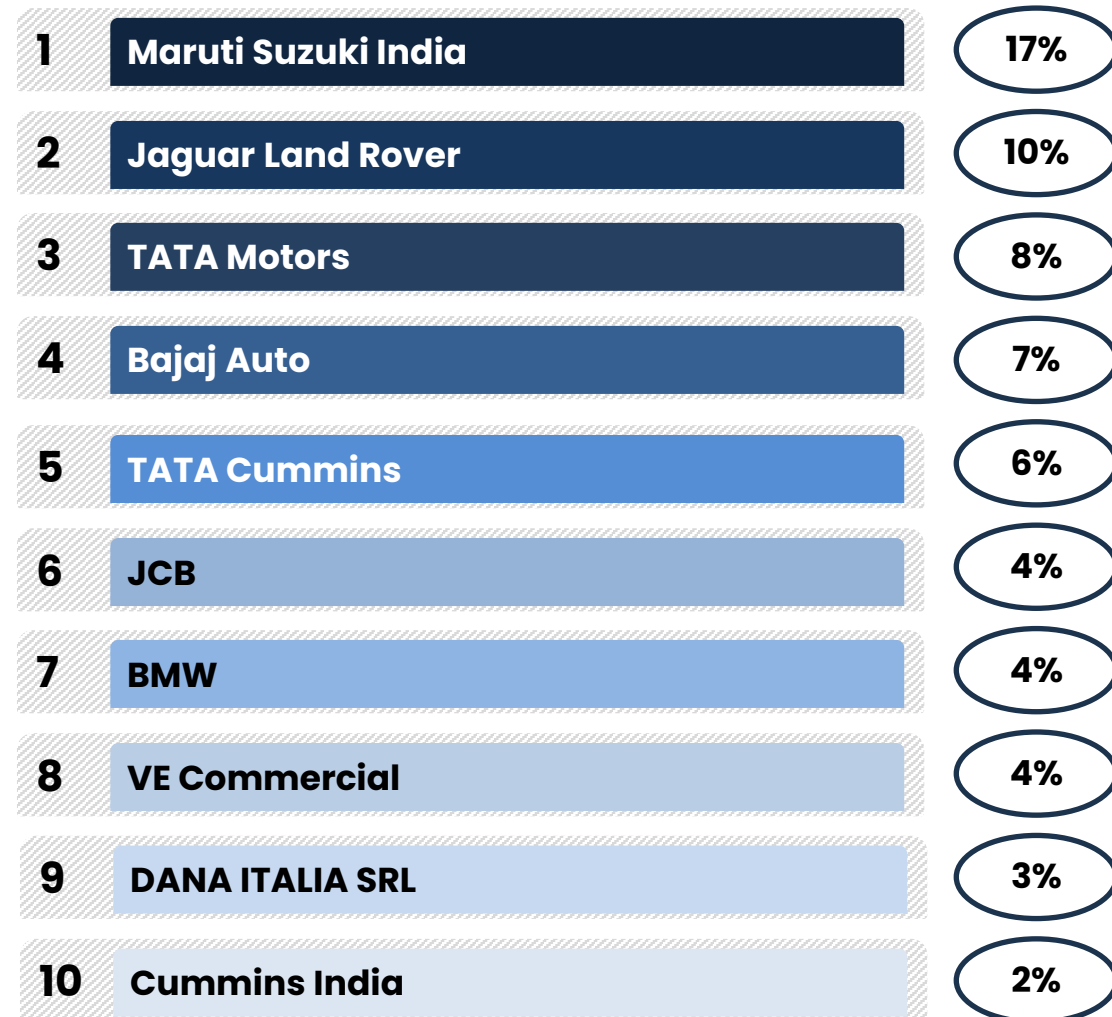
# HAVING DIVERSIFIED CUSTOMER BASE – TOP 10 CUSTOMERS



## FY25



## Q1 FY26





# GASKET BUSINESS



## Market Leader

- **~50%** Market share in Gaskets **3x** the nearest competitor
- Market Leader in – Two-Wheeler, Agri & Off Loaders, HCV & LCV segment
- **Single Source** Supplier for **5** of our customers

## Heat Shields

- Signed up exclusive contract with SANWA for Light Weight Aluminium Heat Shields which is used for automotive applications specially in PV segment and is a futuristic product technology
- Value added features like Noise Reduction, Emission Control, Heat Insulation at challenging temperatures and is a widely used on new generation engines including Hybrid and EV's
- Revenue from **heat shield in Q1 FY26 stands Rs 11.84 Crs.** and from **EV in Q1 FY26 Stands at Rs 0.15 Crs.**

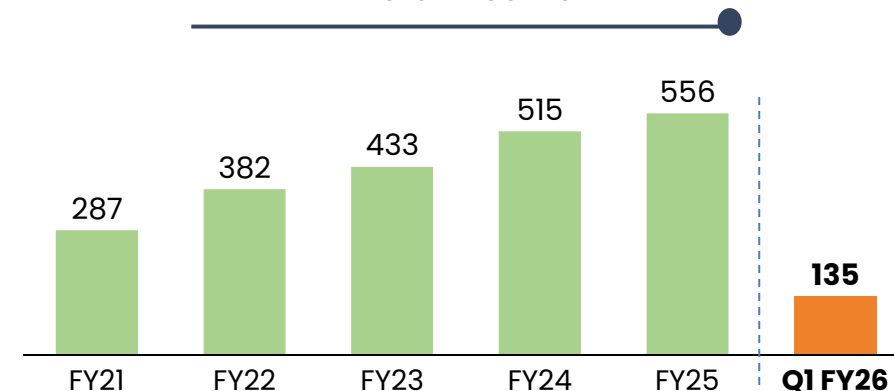
## Order Book

- **Large Order Book for New Products**
  - MSIL – Heat Shields – ~Rs. 14 Crs. p.a.
  - Kia & Hyundai – Heat Shields – ~Rs. 13.5 Crs. p.a.
  - Cummins – Beagle CHG – ~Rs. 25 Crs. p.a.
  - Escort Kubota – CHG – ~Rs. 9 Crs. p.a.
  - CNH – Gaskets – ~Rs. 2 Crs p.a

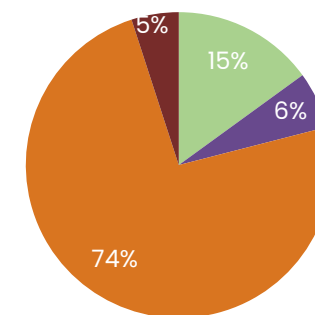
## Growth Strategy

- **Plan to grow revenues by 13% CAGR till FY27 to Rs. 700 crores**
  - Increased Revenues from Heat Shield Business (~Rs. 90 crores p.a. from the Heat Shield Business)
  - Increased Focus on Exports (From 10% in FY18 to ~22% in FY27e)
  - Diversified Segment Portfolio (PV's to increase from 2% in FY18 to ~11% in FY27e)

## Total Income

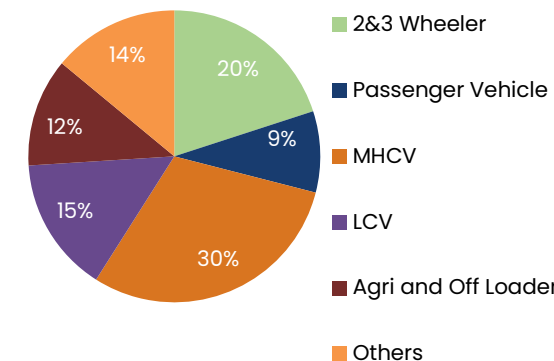


## Segment wise Break Up



Export  
OEM  
After Market  
Others

## Q1 FY26 Breakup





## One step Solution Provider

- One stop solution for **Hot Forging** (750 to 2,500 Ton Press)
- **Strong presence in Overseas Market & Supplier to Top Tier I companies**
- **One Stop Solution** for Die Design, Machine parts and Heat treatment (Normalizing and Carbohydriding)

## Order Book

- **Large Order Book for New Products**
  - JCB UK – Dump End/ Eye End – ~Rs. 75 Crs. p.a.
  - Dana Italy – Ring Gears – ~Rs. 17 Crs. p.a.

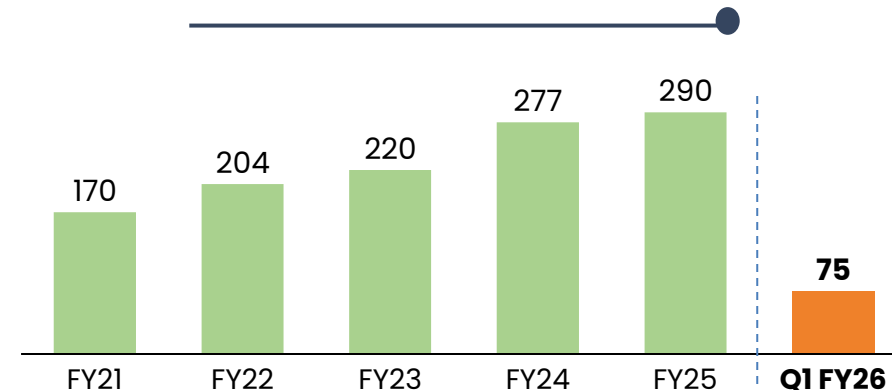
## Product Type

- King Pins
- Gear Blanks
- Housing & Yoke Shafts
- Dump End
- Retaining Plate
- Companion Flange

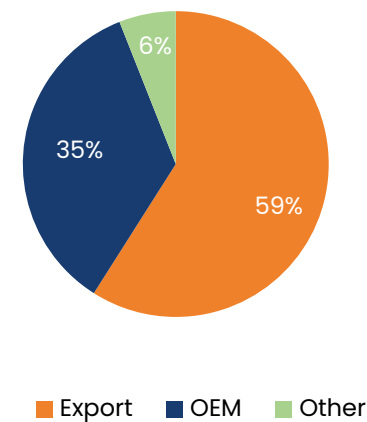
## Growth Strategy

- **Plan to grow revenues by 23% CAGR till FY27 to Rs. 500 crores**
  - Increased Focus On EV's (Revenue of Rs. ~70 Crs. in FY27e with CAGR of 60%)
  - Increased Focus on Exports and expanding geographies (From 47% in FY18 to ~63% in FY27e)
  - Increased Revenues from Agri & Off-Highway (Agri & Off-Highway to increase from 37% in FY18 to ~43% in FY27e)

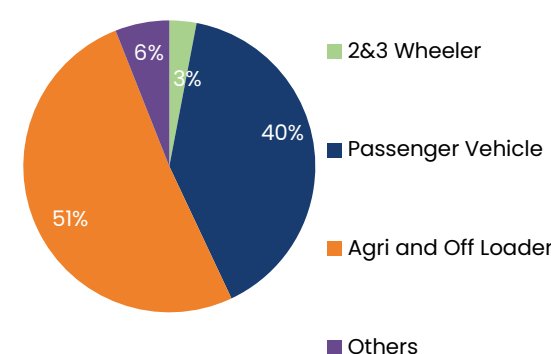
### Total Income



### Segment wise Break Up



### Q1 FY26 Breakup





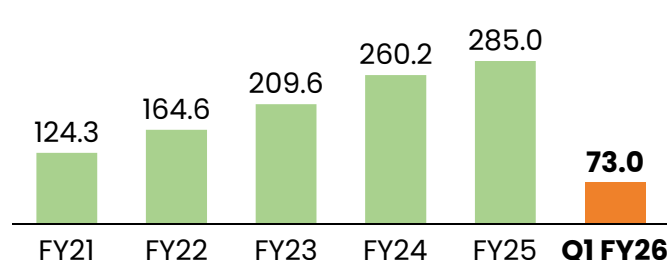


# STRONG GLOBAL PARTNERSHIPS – JOINT VENTURES

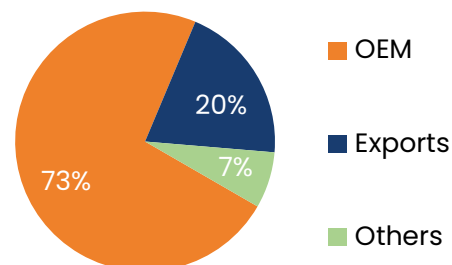


## Marelli Talbros Chassis Systems Pvt. Ltd. (MTC)

- ✓ **Magneti Marelli S.p.a (Milano)** - A Fiat group company with annual revenue of over € 6 Bn
- ✓ 50:50 partnership commenced production in April 2012
- ✓ 100% Sales to OEMs
- ✓ Significant share of Control Arms business from Maruti Suzuki and Tata
- ✓ **Products : Control Arms, Front Axle, Rear Axle**
- ✓ **Key Customers**
  - Maruti Suzuki India
  - Jaguar Land Rover
  - Fiat India
  - Tata Motors



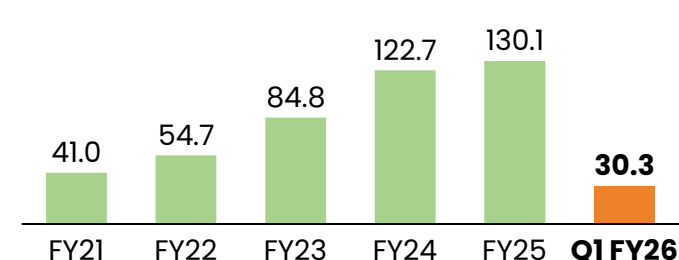
Revenues (Rs. Crs.)



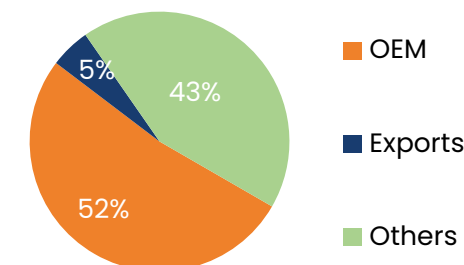
Revenue Split

## Talbros Marugo Rubber Pvt. Ltd. (TMR)

- ✓ **Marugo Rubber Industries Ltd (Japan)** - Global leader in supply of Anti-Vibration Product and Hoses
- ✓ 50:50 partnership commenced production in February 2013
- ✓ 100% Sales to OEMs predominantly Maruti Suzuki
- ✓ **Products : Engine Mounts, Strut Mounts, Mufflers & Hangers, Suspension Bushes, Rubber Bushes, Hoses**
- ✓ **Key Customers**
  - Maruti Suzuki
  - QH Talbros
  - Plastic Omnium Auto Inergy Mfg India Pvt .
  - SML ISUZU LIMITED



Revenues (Rs. Crs.)



Revenue Split



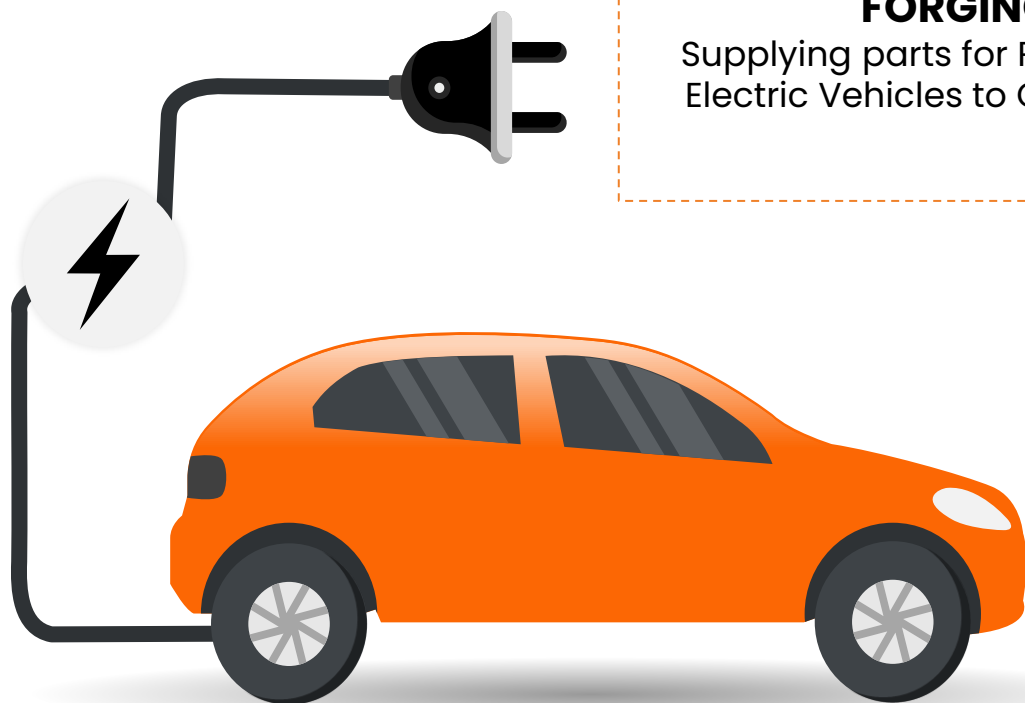


## FORGINGS

Supplying parts for Plug-in hybrid Electric Vehicles to OEMs globally

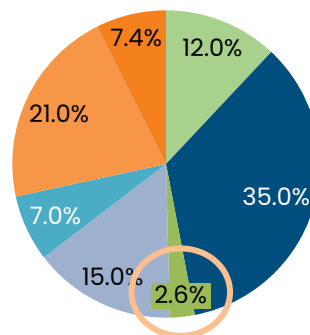


- Marelli Talbros is working on new RFQ's for several Indian and global OEM's for supporting development of future EV's
- Marelli Talbros Supplies Critical Suspension Components to EV's

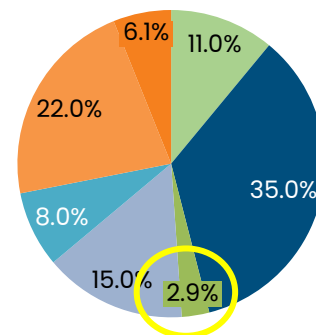


## Increased Focus on EVs\*

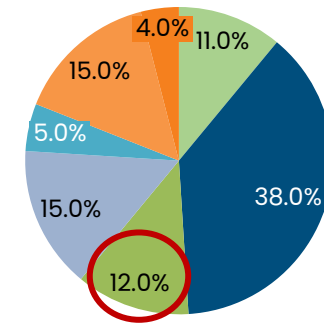
Revenue Breakup (FY25)



Revenue Breakup (Q1 FY26)



Revenue Breakup (FY27e)



2 & 3 Wheeler   EVs   LCV   Others  
Passenger Vehicle   MHCV   Agri & Off Highway



# CAPEX PLANS





	Utilization Levels (FY25)	Addl. Capex to reach Revenues of FY27e	
Gasket & Heat Shield	85%	Rs. 50 Crores	To be funded by Internal Accruals  Capex of Rs. 25-30 Crs. per annum
Forgings	80%	Rs. 60 Crores	
Marelli Talbros Chassis Systems* (MTCS)	74%	Rs. 80 Crores	These amounts will be funded by respective Companies through internal accruals and some borrowings
Talbros Marugo Rubber** (TMR)	AV – 82% Hose – 90%	Rs. 10 Crores	

\* MTCS is a 50% Joint Venture with Marelli Suspension Systems SpA

\*\* TMR is a 50% Joint Venture with Marugo Rubber



## DRIVING FUTURE LEADERSHIP

	Criteria	In FY23		By FY27
	Export Sales*	25%	Increase exports by 10% →	<b>35%</b>
	EBITDA Margins	~14%	Increase margins by 200-400 basis points →	<b>~16-18%</b>
	Higher Returns - ROCE	~16%	Increase RoCE by 4% →	<b>~20%</b>
	Comfortable Debt Profile	~Rs. 80 crores	→	Total Debt to remain <b>under Rs. 100 crores</b>



# TALBROS AT A GLANCE



Over **6 Decades** of experience in Auto Component manufacturing



**Diversified Product Portfolio** – Gasket & Heat Shields, Forgings, Suspension Systems, Anti-vibration Products & Hoses



**Diversified Auto Component Player**  
Across Two Wheelers, PVs, CVs Off-Highway and Farm Equipments



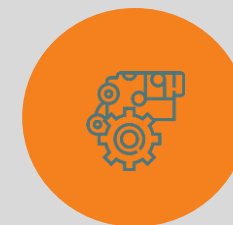
**Electric Vehicles** – Supply to EV's (Major OEM's globally)



**Wide Client Base;**  
Orders from over 30 OEMs across products and geographies



**International Technology Tie-ups**  
including 2 JVs for Best-in-Class Products



*One of the  
**Most Hedged**  
Auto  
Component  
Players*



## **Mr. Anuj Talwar – Joint Managing Director**

*Is a Bachelor in Business Administration from college of William & Mary, Virginia, USA and Master of Business Administration from Boston University Graduate School of Management. He has been associated with the Company since 2008. He has over 16 years of rich experience in the Corporate Finance, Credit analysis and Auto Industry, coupled with his extensive knowledge, expertise in Business Development, International Marketing, General Management and focus on new tech*

*Mr. Anuj Talwar is looking after the performance and business growth of the Company and its Joint Ventures on regular basis*

*He has been successfully able to streamline – products, people perception and positioning of the Company.*

## **Mr. Navin Juneja – Director & Group CFO**

*Is a B.Sc. (Mathematics) and Chartered Accountant (FCA). He is working as Finance Head of Talbros Group as its Group CFO. He is also a Director on Board of the Company. He advises the Company, its Joint Ventures and other Group Companies on Financial Management and Corporate Planning*

*He has more than 36 years of rich experience in Finance, Accounts, Treasury, Taxation and General Management*

*He has extensive experience in the development and implementation of strategic business plans*





# STRONG BOARD OF DIRECTORS



**Mr. Naresh Talwar**

Chairman



**Mr. Umesh Talwar**

Vice Chairman & MD



**Mr. Varun Talwar**

Joint Managing  
Director



**Mr. Anuj Talwar**

Joint Managing  
Director



**Mr. Navin Juneja**

Director & Group CFO



**Mr. Vidur Talwar**

Non-Executive  
Director



**Mr. Deepak Jain**

Independent  
Director



**Mr. Rakesh Vohra**

Independent  
Director



**Mr. Rajat Verma**

Independent  
Director



**Mr. Tarun Singhal**

Independent  
Director



**Mrs. Priyanka Gulati**

Independent  
Director



**Mr. Ajay Kumar Vij**

Independent  
Director





## ***Mr. Manish Khanna***

### **Chief Financial Officer**

A Qualified CA and MBA, he has over 18 years of experience with LeeBoy India Constructions, Doosan Infracore, Escorts Construction Equipment and Amforge Industries

## ***Mr. Suresh Sharma***

### **President Operations – Gaskets Division**

He is an engineer and MBA (Operations). He has over 26 years of experience in the Auto Components sector and has worked with Munjal Showa, Endurance, JBM Auto and Omax Auto

## ***Mr. Tadaaki Kondo***

### **Managing Director – Talbros Marugo Rubber Pvt. Ltd.**

Tadaaki KONDO (Mr.), with 25+ years of experience in Auto Industry, appointed as MD since April 2023, participating from Marugo Rubber Industry Co., Ltd. in Japan.

## ***Mrs. Seema Narang***

### **Company Secretary**

She has over 30 years of experience in the secretarial department and has worked with Whirlpool of India and Aksh Optifibre Ltd

## ***Mr. Vivek Singh***

### **President – Forging Division**

He holds a Mechanical Engineering degree and has a rich experience in manufacturing of more than two decades in varied sectors including Auto & Auto component, Railway signalling & Telecom, Geo Info Systems & IT technology and Powertrain.

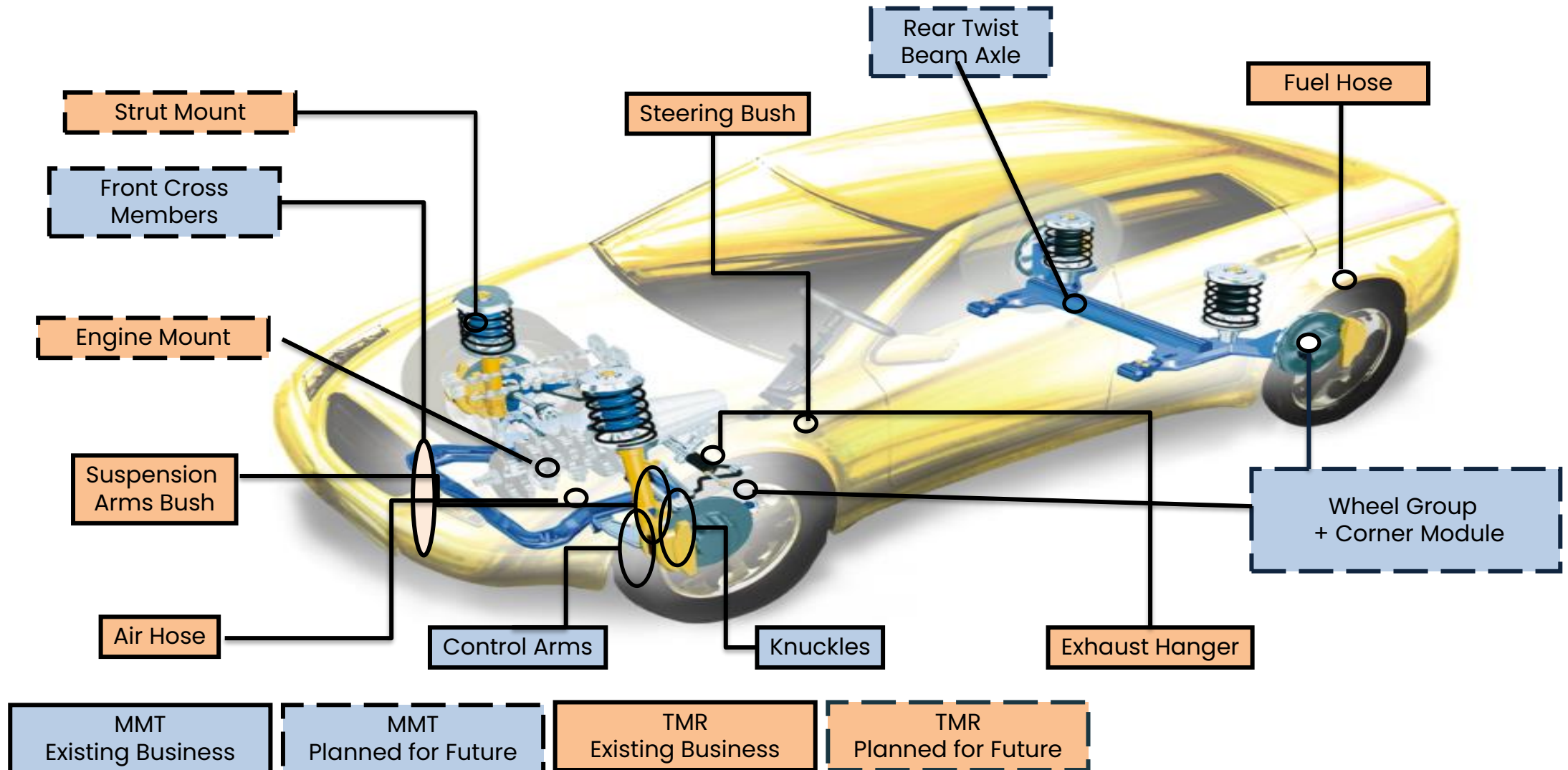
## ***Mr. Ashish Gupta***

### **CEO – Magneti Marelli Talbros Chassis System Pvt. Ltd.**

He holds a BE degree and has over 25 years of experience with manufacturing companies in India, Europe & CIS

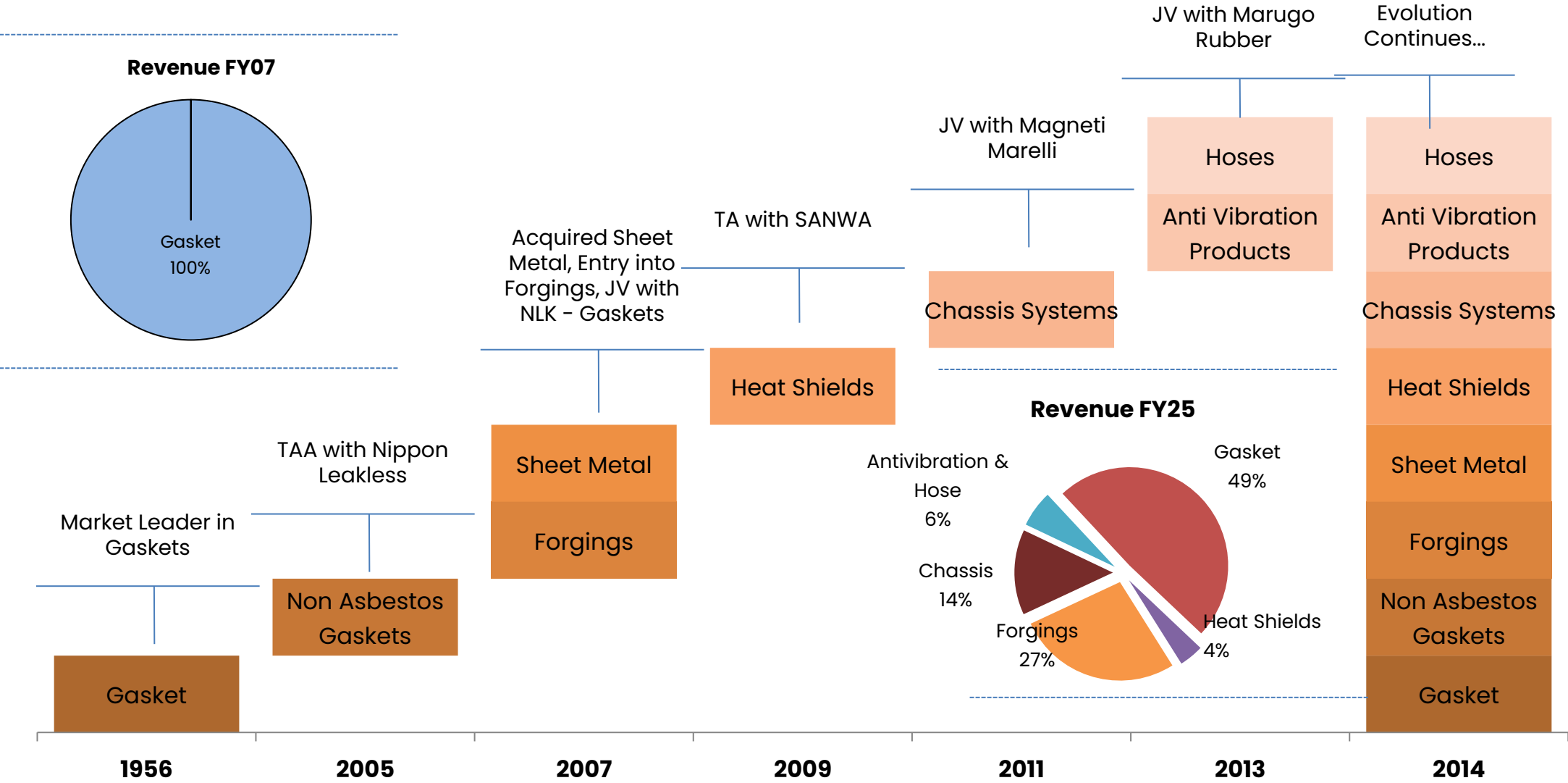


# SCOPE OF JOINT VENTURES





# EVOLVING PRODUCT PORTFOLIO





# DIVERSIFIED CUSTOMER – OEM

Hedged Customer Base

2 Wheeler



ROYAL  
ENFIELD



Passenger



HCV/LCV



DAIMLER

Agri & Off Loader



Agri & Off Loader



VOLVO





# CUSTOMER AWARDS FOR BEST PERFORMANCES



Appreciation Award  
for Overall  
Performance to MTCS  
- 2023



Response to New  
Product  
Development  
2023



ACMA Atmanirbhar  
Excellence Awards  
2022



Award from Jaguar Land  
Rover for Gasket Business  
2022



Quality improvement  
contest award –  
Kirloskar Oil Engines  
Ltd 2021



JLKR-Q certificate-2021



Quality improvement  
contest award –  
Kirloskar Oil Engines Ltd.  
2020



Appreciation certificate  
for NPD support –  
Cummins 2020



Appreciation  
award for NPD  
support –  
Cummins 2020



EEPC India – Star  
Performer for  
Miscellaneous  
Transport and  
Equipment Parts 2019





# HISTORICAL CONSOLIDATED PROFIT & LOSS STATEMENT



Particulars (Rs. Crores)	FY25	FY24	FY23
<b>Revenue from Operations</b>	<b>827.1</b>	<b>778.3</b>	<b>647.2</b>
Other Income	17.7	12.6	6.2
<b>Total revenue from Operation</b>	<b>844.7</b>	<b>790.9</b>	<b>653.4</b>
Raw Material	429.4	422.5	351.1
Employee Cost	92.3	81.1	70.7
Other Expenses	175.9	160.0	138.1
<b>EBITDA</b>	<b>147.3</b>	<b>127.2</b>	<b>93.5</b>
<b>EBITDA Margin</b>	<b>17.4%</b>	<b>16.1%</b>	<b>14.3%</b>
Depreciation	31.9	25.9	23.7
<b>EBIT</b>	<b>115.4</b>	<b>101.3</b>	<b>69.8</b>
<b>EBIT Margin</b>	<b>13.7%</b>	<b>12.8%</b>	<b>10.7%</b>
Finance cost	13.7	13.3	11.4
Share of Profit from JVs	17.7	16.2	11.9
<b>Profit before Tax (Before Exceptional Items)</b>	<b>119.4</b>	<b>104.2</b>	<b>70.3</b>
Tax	25.0	21.3	14.7
<b>Profit After Tax (Before Exceptional Items)</b>	<b>94.4</b>	<b>82.9</b>	<b>55.6</b>
<b>PAT Margin %</b>	<b>11.2%</b>	<b>10.5%</b>	<b>8.5%</b>
Exceptional items	0.0	42.5	0.0
Tax on Exceptional Items	0.0	15.4	0.0
<b>Profit After Tax</b>	<b>94.4</b>	<b>110.0</b>	<b>55.6</b>
<b>PAT Margin %</b>	<b>11.2%</b>	<b>13.9%</b>	<b>8.5%</b>



# HISTORICAL CONSOLIDATED BALANCE SHEET



ASSETS (Rs. Cr.)	Mar-25	Mar-24	Mar-23
<b>Non-current assets</b>			
Property, plant and equipment	217.7	209.0	168.0
Capital work in progress	22.7	7.3	4.8
Investment property	2.5	2.7	2.8
Intangible assets	0.3	0.6	0.7
Investments accounted for using the equity method	64.0	47.4	71.4
<b>Financial assets</b>			
Investments	145.4	138.4	55.3
Other financial assets	3122	70.7	2.8
Current Tax Assets	1.7	3.3	2.2
Other non-current assets	3.5	6.7	3.6
<b>Non-Current Assets</b>	<b>489.0</b>	<b>486.0</b>	<b>311.6</b>
<b>Current assets</b>			
Inventories	125.9	126.8	132.5
<b>Financial assets</b>			
Trade receivables	245.7	210.3	168.5
Cash and cash equivalents	14.8	2.4	5.3
Bank balances other than Cash and Cash equivalents	48.2	2.8	2.8
Loans	1.6	2.7	3.9
Other financial assets	1.9	1.6	1.4
Other current assets	23.5	24.2	29.8
<b>Current Assets</b>	<b>461.5</b>	<b>370.8</b>	<b>344.2</b>
<b>TOTAL - ASSETS</b>	<b>950.5</b>	<b>856.7</b>	<b>655.8</b>

EQUITY AND LIABILITIES (Rs. Crs.)	Mar-25	Mar-24	Mar-23
<b>Equity</b>			
Equity Share capital	12.3	12.3	12.3
Other equity	620.3	524.8	355.2
<b>Shareholders' Funds</b>	<b>632.6</b>	<b>537.2</b>	<b>367.5</b>
<b>LIABILITIES</b>			
<b>Non-current liabilities</b>			
<b>Financial liabilities</b>			
Borrowings	3.6	3.4	6.1
Lease Liabilities	8.0	9.9	0.0
Other financial liabilities	0.5	0.3	0.2
Provisions	2.7	2.1	2.0
Deferred tax liabilities (net)	34.7	33.5	14.5
Other non-current liabilities	0.2	1.1	0.8
<b>Non-Current Liabilities</b>	<b>49.6</b>	<b>50.2</b>	<b>23.6</b>
<b>Current liabilities</b>			
<b>Financial liabilities</b>			
Borrowings	79.5	82.8	80.8
Lease Liabilities	2.7	2.6	0.1
Trade payables	169.6	167.7	168.9
Other financial liabilities	8.0	8.6	8.4
Other current liabilities	7.2	6.3	5.3
Provisions	1.4	1.3	1.2
Current tax liabilities (net)	0.0	0.0	0.0
<b>Current Liabilities</b>	<b>268.3</b>	<b>269.3</b>	<b>264.6</b>
<b>TOTAL - EQUITY AND LIABILITIES</b>	<b>950.5</b>	<b>856.7</b>	<b>655.8</b>





# HISTORICAL CONSOLIDATED CASH FLOW STATEMENT



Particulars (Rs. Crores)	FY25	FY24	FY23
<b>PBT</b>	<b>119.4</b>	<b>146.7</b>	<b>70.3</b>
Adjustments	16.7	-23.5	22.1
<b>Operating profit before working capital changes</b>	<b>136.2</b>	<b>123.2</b>	<b>92.4</b>
Changes in working capital	-32.3	-33.7	-20.5
<b>Cash generated from operations</b>	<b>103.8</b>	<b>89.4</b>	<b>71.9</b>
Direct taxes paid (net of refund)	-23.8	-22.7	-15.4
<b>Net Cash from Operating Activities</b>	<b>80.0</b>	<b>66.7</b>	<b>56.6</b>
<b>Net Cash from Investing Activities</b>	<b>-44.7</b>	<b>-51.8</b>	<b>-37.0</b>
<b>Net Cash from Financing Activities</b>	<b>-22.9</b>	<b>-17.9</b>	<b>-16.3</b>
<b>Net Change in cash and cash equivalents</b>	<b>12.5</b>	<b>-2.9</b>	<b>3.2</b>
Opening Cash Balance	2.4	5.3	2.1
<b>Closing Cash Balance</b>	<b>14.8</b>	<b>2.4</b>	<b>5.3</b>



Driving Future Leadership

# THANK YOU !

**For further information, please contact:**

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Investor Relations Advisors:

**SGA** Strategic Growth Advisors

Strategic Growth Advisors Pvt. Ltd.  
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