

WE CRAFT STEEL



**August
2021**

Safe Harbour

Except for the historical information contained herein, statements in this presentation and the subsequent discussions, which include words or phrases such as "will", "aim", "will likely result", "would", "believe", "may", "expect", "will continue", "anticipate", "estimate", "intend", "plan", "contemplate", seek to", "future", "objective", "goal", "likely", "project", "should", "potential", "will pursue", and similar expressions of such expressions may constitute "forward-looking statements". These forward looking statements involve a number of risks, uncertainties and other factors that could cause actual results to differ materially from those suggested by the forward-looking statements. These risks and uncertainties include, but are not limited to our ability to successfully implement our strategy, our growth and expansion plans, obtain regulatory approvals, our provisioning policies, technological changes, investment and business income, cash flow projections, our exposure to market risks as well as other risks. The Company does not undertake any obligation to update forward-looking statements to reflect events or circumstances after the date thereof.

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Porter's Five Forces

Core Competence

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Key Takeaways

APL APOLLO OVERVIEW



APL Apollo at a Glance

1 Leading structural steel tube brand

Core Business

14 Four Product Categories

Brands

50% Market Share*

2.6 Structural Steel Capacity

Million Ton

8 Patents

10 Plants

2,124 Employees

800+ Distributors

1,500+ Products

*Market share is for FY21

Our Brands

Product Category*

Apollo Structural

Structural steel construction material:
Residential, Commercial, Infrastructure

Fabritech, Build, DFT, Column, FireReady, Agri

Apollo Z

Galvanized structural steel construction material: Residential,
Commercial, Infrastructure

CoastGuard

Apollo Galv

Galvanized steel tubes:
Residential, Commercial, Agri, Industrial

Green, Bheem, Z+

Apollo Tricoat

Home improvement products

Plank, Signature, Elegant, Chaukhat

75% Building Material

20% Infrastructure

5% Others

*Apollo Structural -Hollow Section & Black Round, Apollo Z- Pre Galvanized (GP), Apollo Galv – Galvanized (GI)

Product Category – Application & Sales Mix*

Product Category	Sales Volume Mix (%)	Applications
Apollo Structural	63%	
Residential Buildings & Independent Homes	25%	Structural, Piling, Sheds, Handrails, Gates, Fencing, Balcony Grills, Staircase, Light Structures
Commercial Buildings, Warehouses & Factories	14%	
Infrastructure	20%	Structural for Metros, Airports, Stadiums, Stations etc
Industrial & agriculture	4%	Heavy Equipment
Apollo Z	19%	
Residential Buildings & Independent Homes	14%	Galvanized structural steel tubes for coastal markets
Commercial Buildings, Warehouses & Factories	5%	
Apollo Tricoat	14%	
Residential Buildings and Independent Homes	11%	Door Frame, Staircase Steps, Furniture, Plank, Designer Tubes, Fencing, Electrical Conduits
Commercial Buildings	3%	
Apollo Galv	4%	
Commercial Buildings	3%	Galvanized Structural, Greenhouse Structures, Plumbing, Firefighting
Industrial & agriculture	1%	
Total	100%	

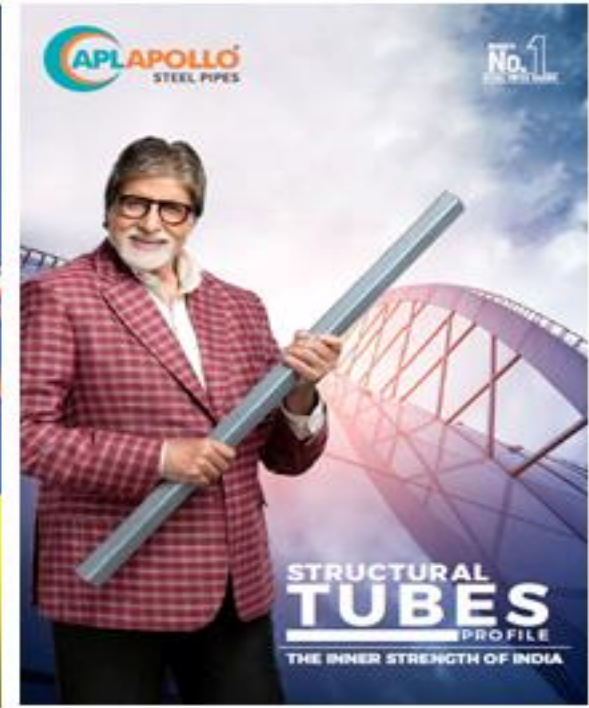
50% Building Material Housing

25% Building Material Commercial

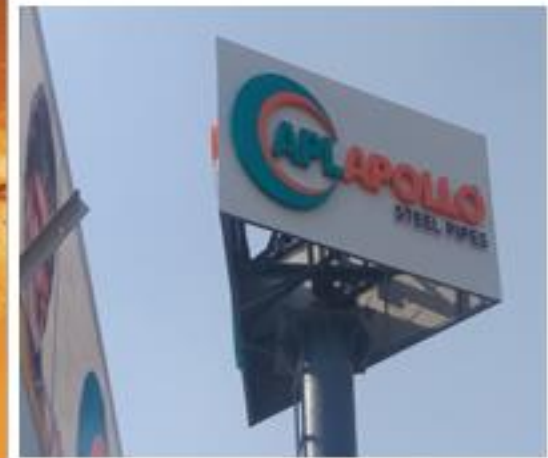
20% Infrastructure

5% Others (Industrial & Agri)

Brand Equity



Brand Equity



B2C Channel



Transformation



FY21 – Converted crisis into opportunity

Market Share Gains

Gained market share to 50% from 40% in structural tubes in India

Cash and Carry model

Net Working capital decreased to 8 days from 25 days

Balance Sheet Strengthening

Net Debt decreased to Rs 1.6Bn from 7.9Bn

Value Added product expansion

Contribution from value added products increased to 57% from 45%

Financial Growth

Flat sales volume, EBITDA growth of 42%, Net profit growth of 51%, ROCE improved 850bps to 26.9%

Solid cash flow generation

Op cash flow of Rs9.9Bn and Free cash flow of Rs6.1bn

Market Expansion

Started capex to produce 500x500mm dia structural tubes and color coated tubes

Brand Equity Strengthening

Indian Premier League Sponsorship, Amitabh Bachchan TV Campaign

Sustainability

Heading towards becoming an ESG focused company

Foreign Institutional Holding

Increased to 24% from 11%

Porter's Five Forces



Porter's Five Forces

Threat of Entry

- Scale of 2.6m ton capacity; wide gap between No. 2 Player
- Vast distribution network (access to 800+ distributors, 50,000 retailers, 200k fabricators)
- Technology advantage (DFT, ILG)
- Lowest cost producer (highest profitability in the sector)
- Product range (1,500+ SKUs)
- Lead time to distributors (48hrs delivery)
- Financial strength (doubling capacity every 3rd year without debt)
- Unmatched brand strength

Bargaining power of suppliers

- Company buys 2% of Indian steel production and 10% of Indian HR coil production
- Amongst Top 3 customers for large steel producers
- Company's steel buying price is minimum in structural steel tubing industry

Industry Rivalry

- APL Apollo 50% market share
- Player 2 - 9% market share (ancillary business for steel producer)
- Player 3 - 9% market share (focus on water transportation products)
- Player 4 - 7% market share (strong player but small in Parent's overall scheme of things)
- Player 5 - 7% market share (focused in East market; regional player)
- Player 6 - 6% market share (high debt)
- Player 7 - 3% market share (high debt)
- Player 8 - 2% market share (poor profitability)
- Others - 7%

Bargaining power of distributors

- 50% market share in structural steel tubing industry
- Monopoly products (new innovative products)
- APL Apollo distributors can churn capital upto 8x in a year which helps them generate high ROCE

Threat of substitute

- No product can replace structural strength of steel

CORE COMPETENCE



Our Business Moat...

Highest no. of
products with
1,500 SKUs

Highest scale with 10 plants
(2.6Mn ton capacity)

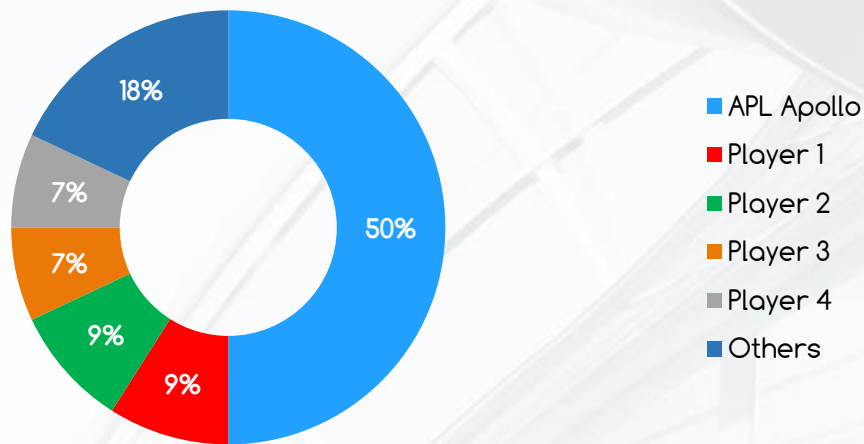
Largest sales network
(800+ distributors)



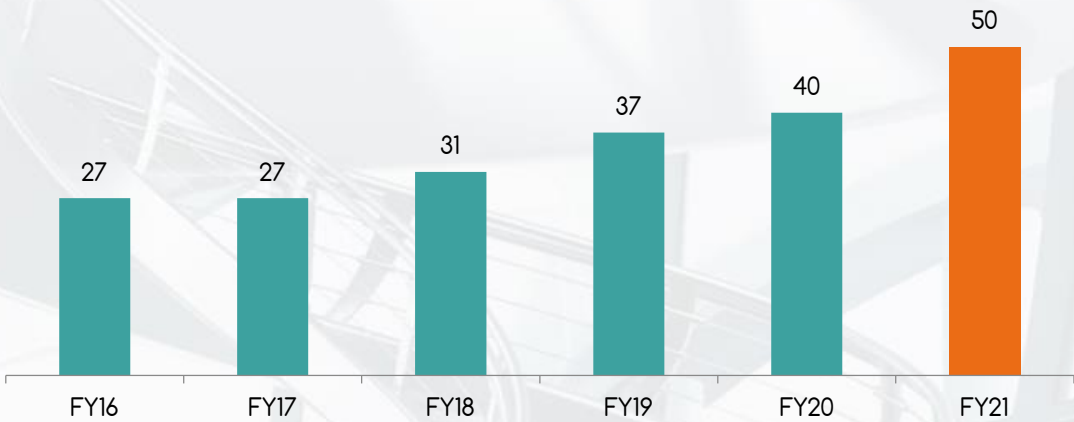
Lowest lead time for
delivery to distributors

Dominant Leadership

Peer Market Share FY21



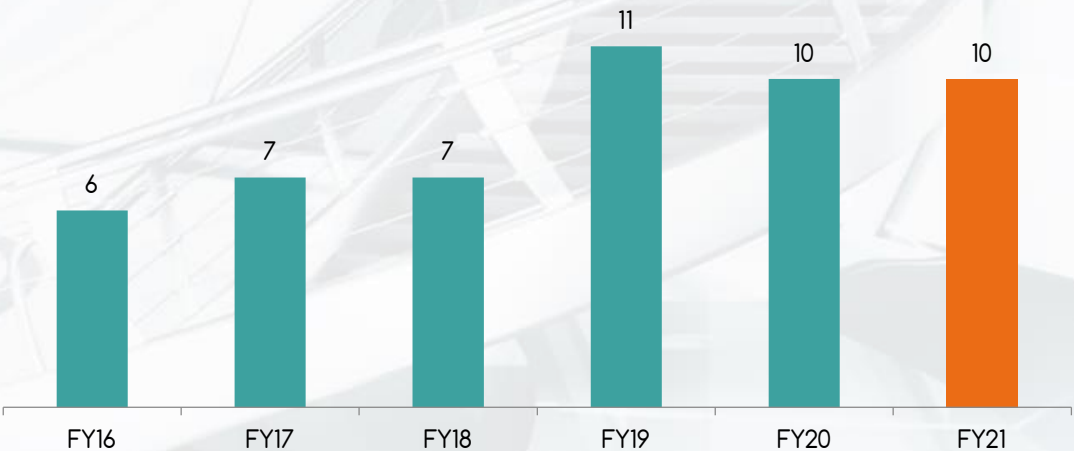
APL's Market Share (%)



Capacity (Mn Tons)



Number of Plants



Unique Capabilities



Developed structural
steel
market in India

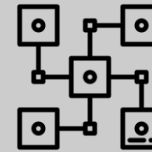
First Mover advantage

No.1 Leader; Focused on
steel strength and
building material
applications



Technology

Direct Forming Technology
for big structural
products
In-line Galvanizing to
replace traditional
products



Distribution
network

B2C channel for last
mile penetration



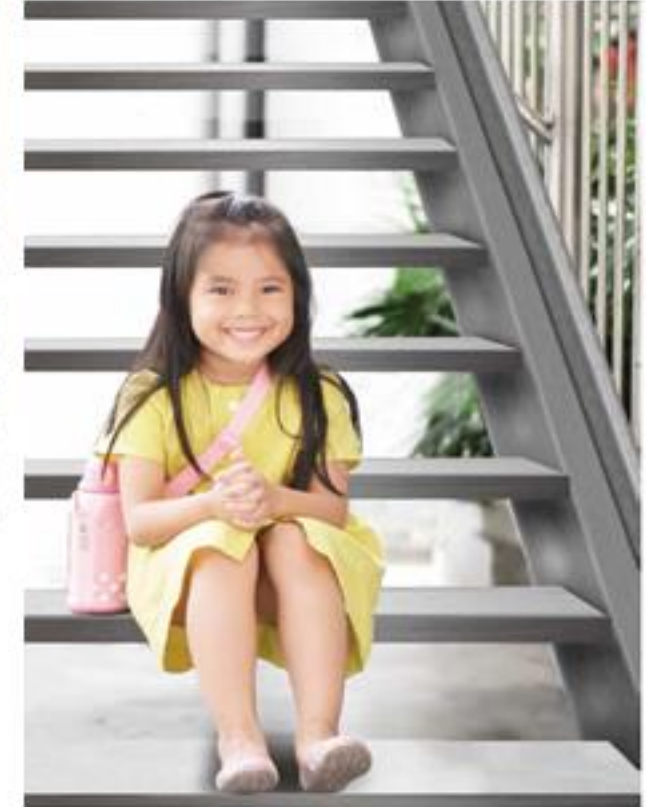
Innovative
products

Ground breaking
solutions

Roofing solutions for
coastal market, door
frame

STRUCTURAL STEEL TUBES APPLICATIONS





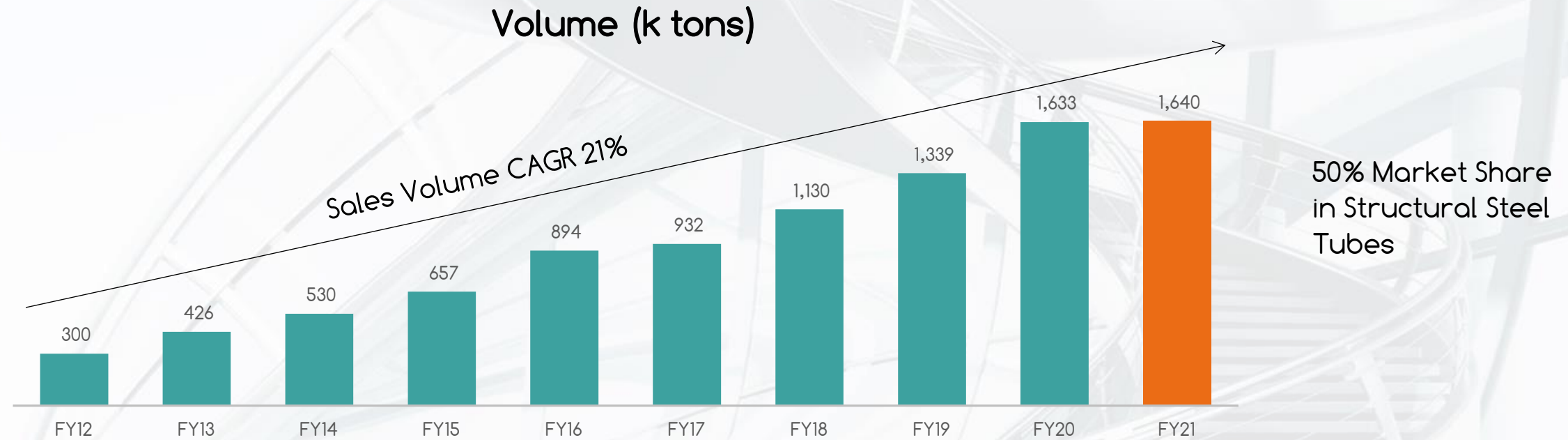
Structural Steel Tubes Applications



Market Creation



Growing Strength to Strength



- Developed Structural steel tube market in India
- Focused on steel strength and building material application
- Innovation of new sizes and shapes
- Introduction of new applications

How have we created market..

Conventional Construction Products	Applications	Why Structural Steel Tube replaces these products?
Steel Angle/Channels	Structural support, Towers infrastructure	Uniform Strength, Lower steel consumption
Wood	Furniture, Door Frames, Planks	Cost Effective, Termite Proof, Environmental Friendly
Aluminum Profiles	Facades & Glazing	Cost Effective, Higher Strength
Reinforced Cement Concrete	Construction of Buildings	Faster Construction Environmental Friendly
Fabricated Metal Sheet	Pre-Engineered Steel Buildings	Lower steel consumption Reduces overall project cost



Low Diameter Steel Tubes/Low Load Bearing

High Diameter Steel Tubes/High Load Bearing

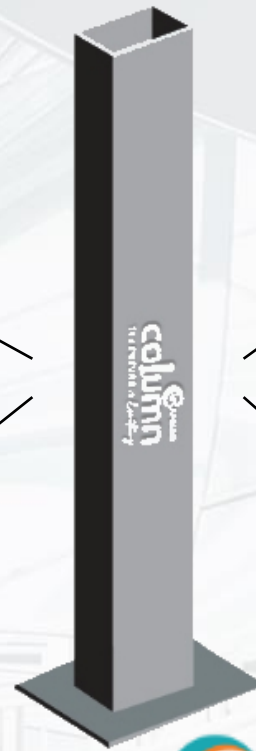
New Opportunities to revolutionise construction industry

Warehousing

Affordable Housing

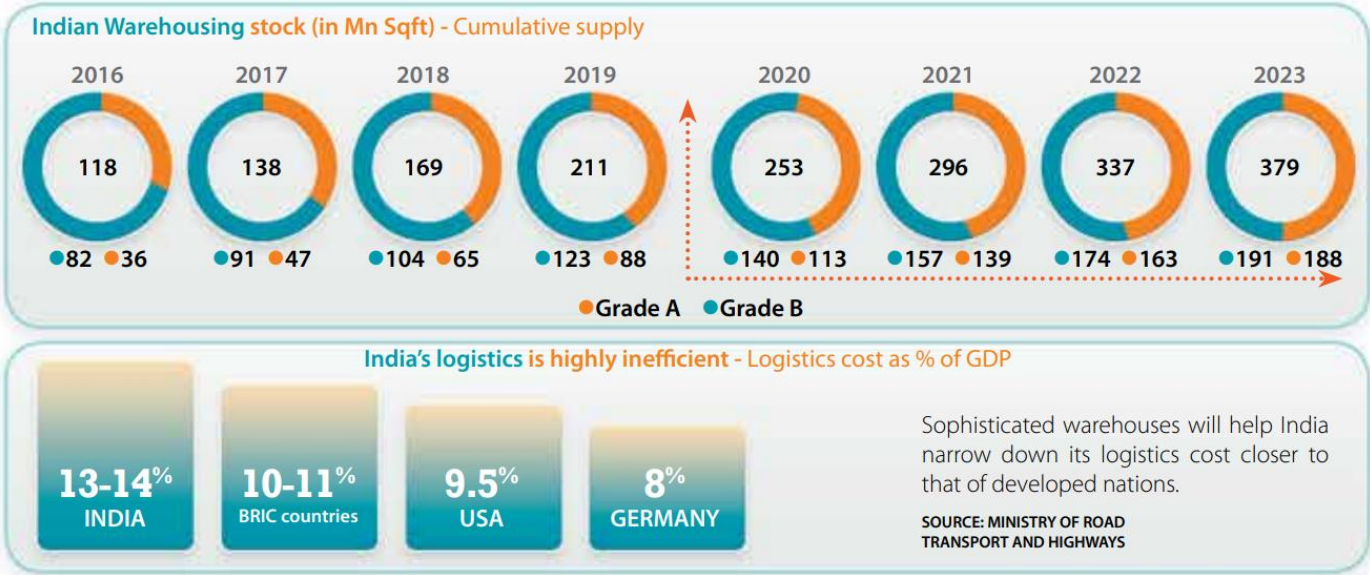
Urban Infrastructure

Urban Real Estate



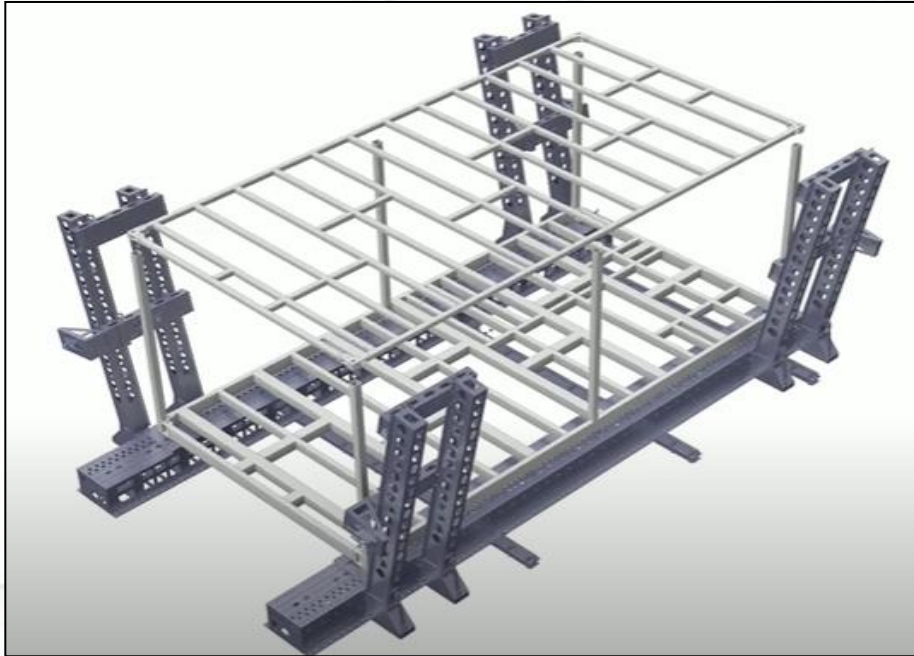
Warehousing

- JLL projects that there will be 344 mn sq. ft of warehousing space in India by 2022
- Logistics, engineering, auto and ancillaries, e-commerce, FMCG, retail and telecom, and white goods have remained the biggest demand drivers.



Affordable Housing

- Trends for affordable housing with low cost & faster completion is picking in India
- Modular Building will be the future construction methodology
- Modular steel structures are constructed in-house with final assembly occurring on-site, where the steel modules are stacked and connected together



Modular Building Concept

Urban Infrastructure

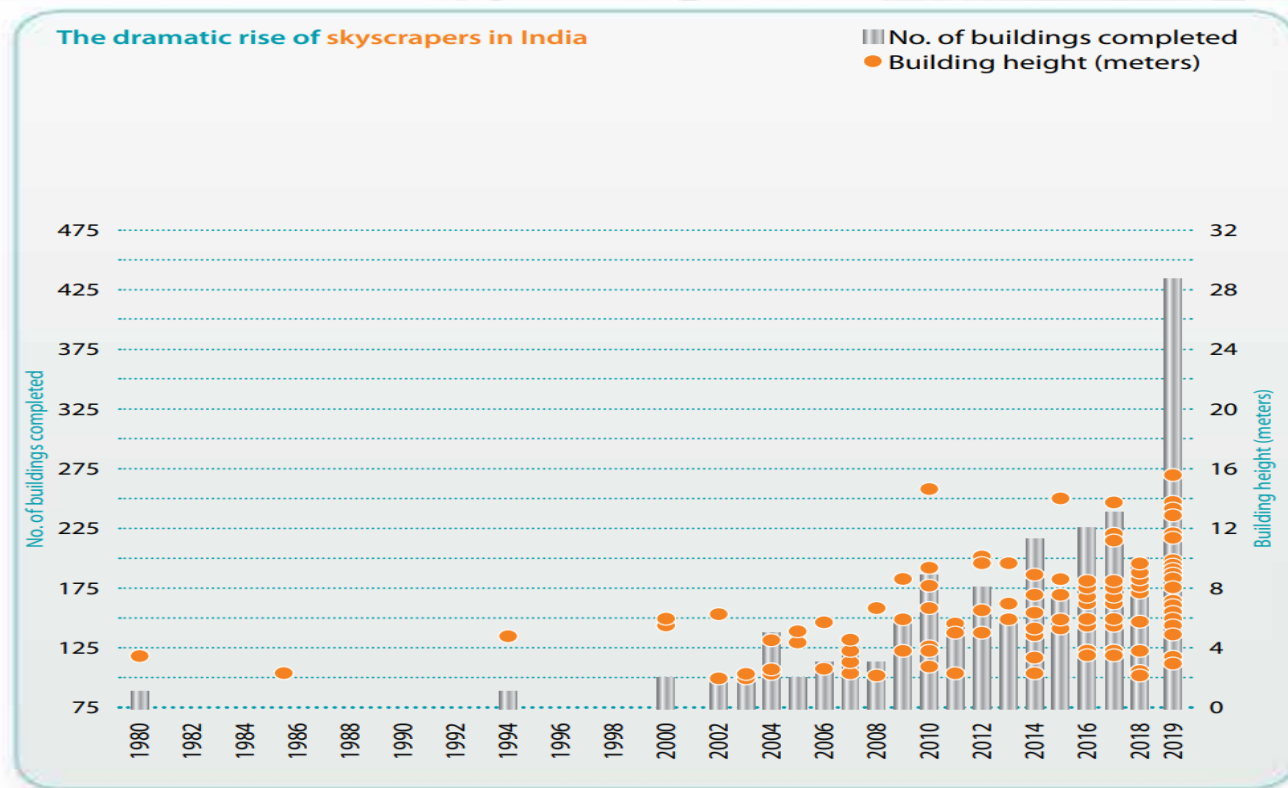
- Govt plans to start 100 additional airports by 2024
- To invest Rs19,000 crore in upgrading airport infrastructure in the country, especially in smaller cities over next three years



Structure Steel Tube: Revolutionise the Construction Industry

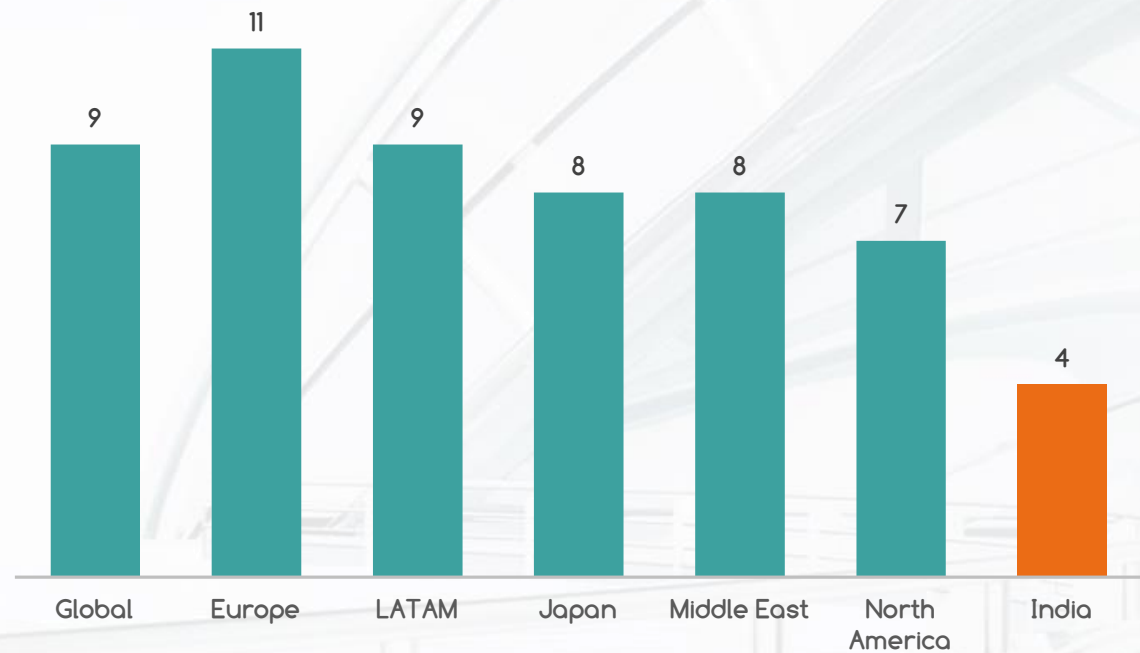
Urban Real Estate

- India's vertical growth pushed high-rises buildings with G+20 floors or more to record highs in 2019
- Government has formed a panel to look into the upward revision of FSI norms in all major cities

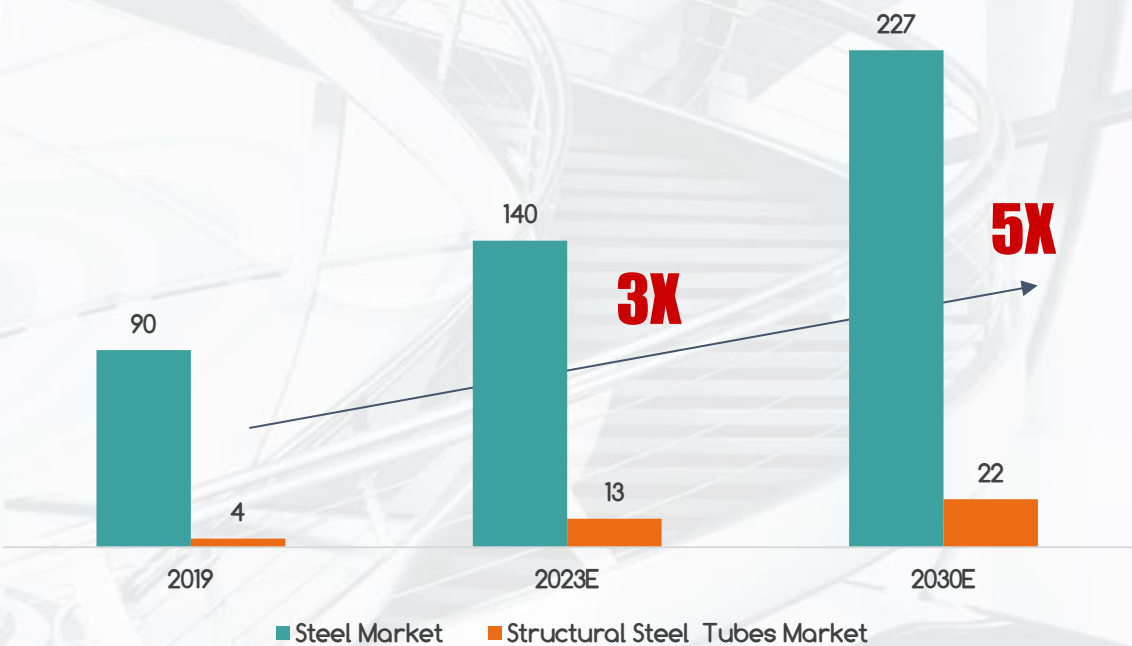


India at the start of Structural Steel Usage

Structural Steel Tubes Market as % of Steel Market (2020)



Potential Structural Steel Tubes Market in India (Mn Tons)



India has huge structural steel tubes based construction potential

Note: Structural Steel Tubes is 4Mn ton market size, out of total ERW market size of 6Mn ton (balance is water transportation)

Source: Company data and Industry research

Structural Steel Tubes essential for new age construction

Growth Drivers

Growing vertical model of development

Increased Spending on Skyscrapers

Higher expenditure on infrastructure

Highways, bridges, flyovers & public utilities

Growth in E-commerce/Warehouse construction demand

Consumer preference for better quality residential construction

Rising need for housing due to population explosion

Ability to replace wood gives it an edge

Benefits

Environmental friendly

Recyclable & lower greenhouse gas emission

No underwater usage unlike conventional method

Highly durable, sustainable, fire resistant & easy to repair

Swift erection speed helping in lower overhead costs

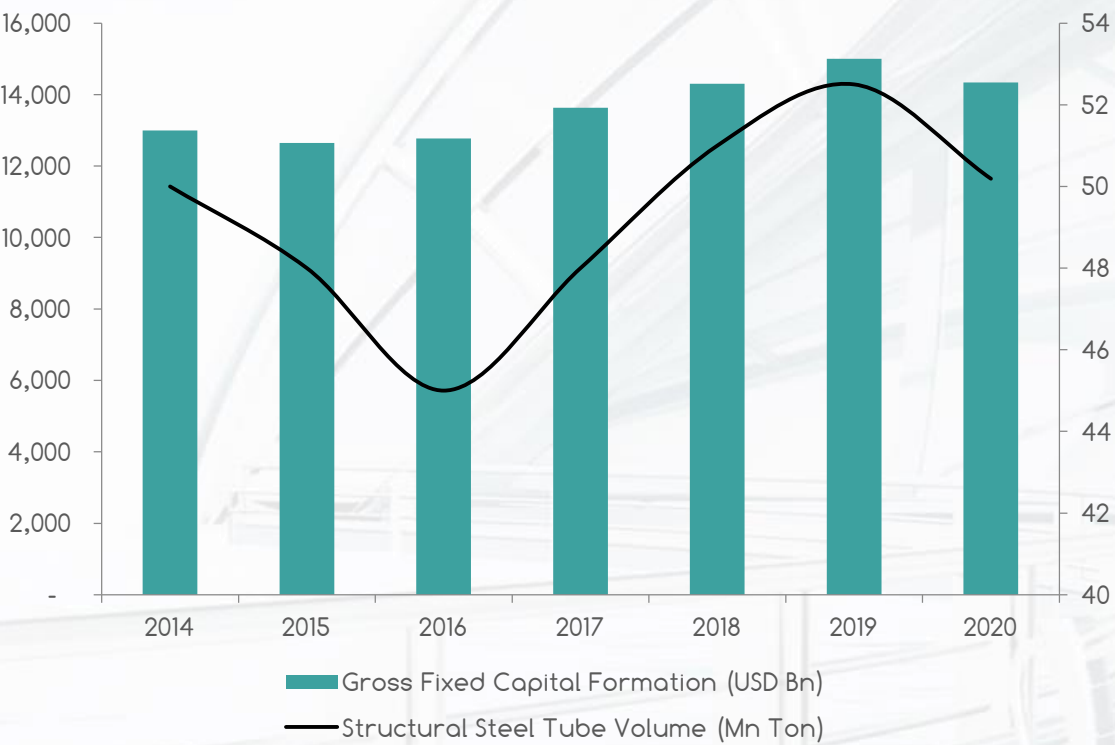
Elevated stress bearing capacity

Excellent Strength to Weight Ratio

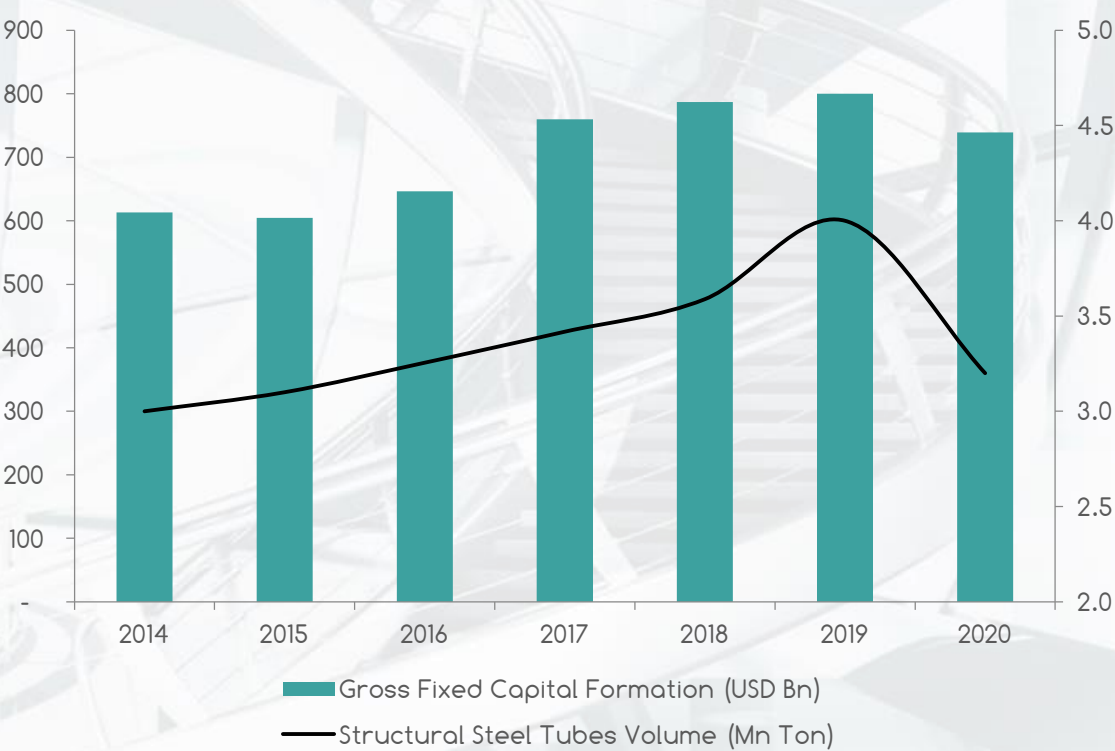
Light weight

Structural Steel Tubes Market expansion linked to construction activity

Global Structural Steel Tubes Market expansion

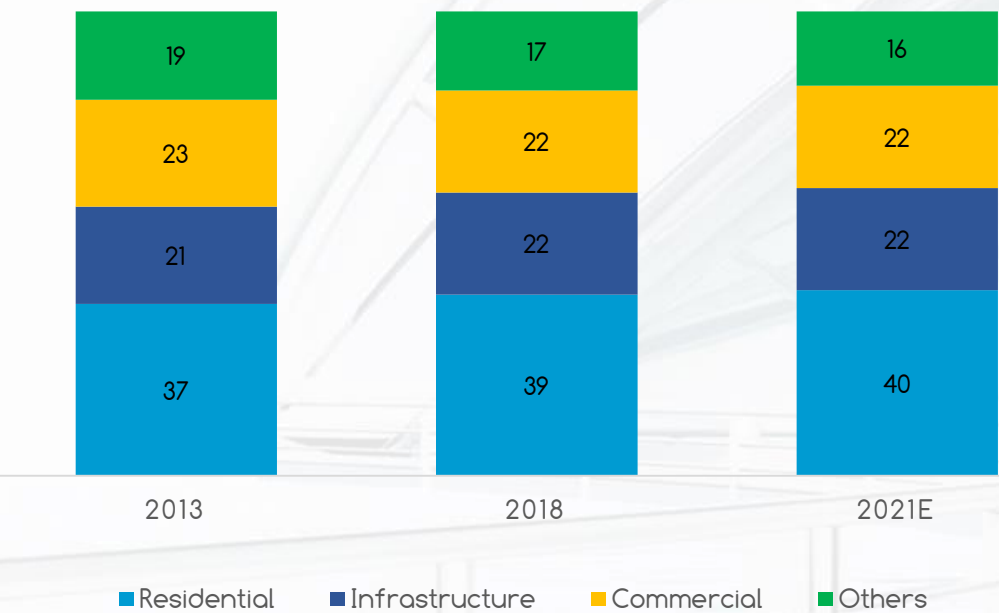


Indian Structural Steel Tubes Market expansion

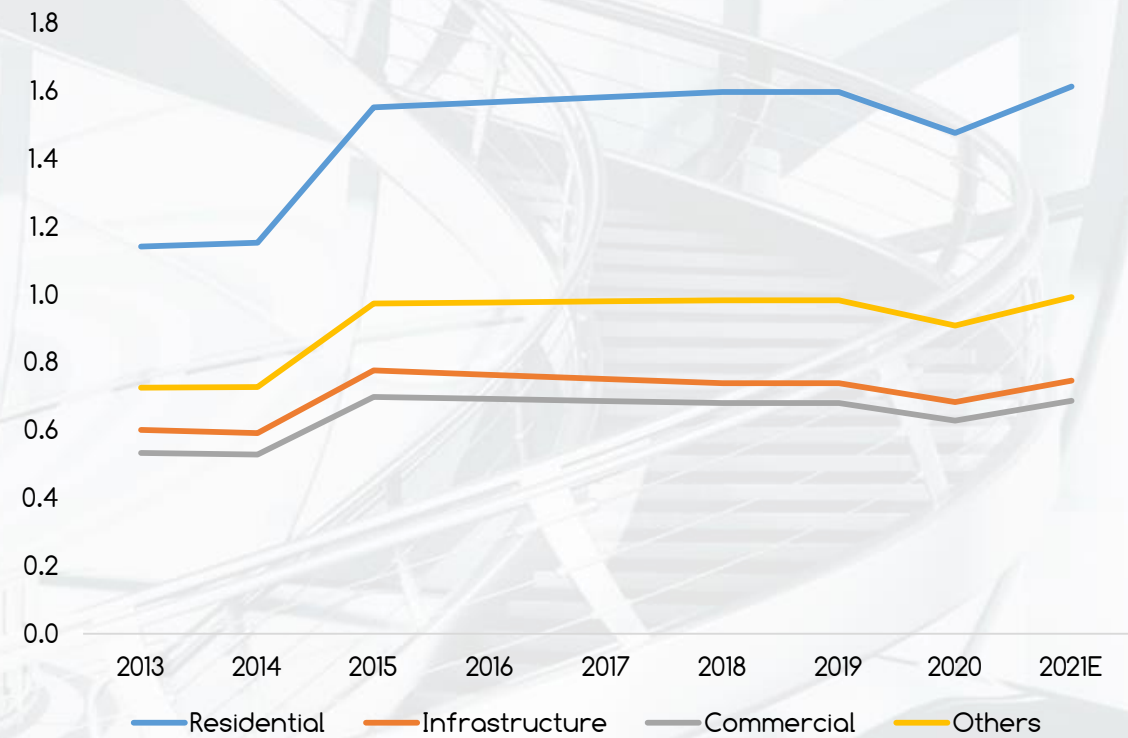


Structural Steel Tubes Uses

Global Structural Steel Tubes Uses - Segment wise breakup (%)



Indian market taking off in all segments (Mn ton)



Structural Steel Market Expansion

Global Structural Steel Market growth forecasts (Mn Ton)



Growth Drivers for India

Rising population accompanied with improvement in living standards

Requirement for strong, durable quality of construction for private residences

Increased spending on construction of infrastructure

Future of Construction



We are ready..

Opportunity Size..

Potential structural steel market size of:
✓ 22Mn by 2030

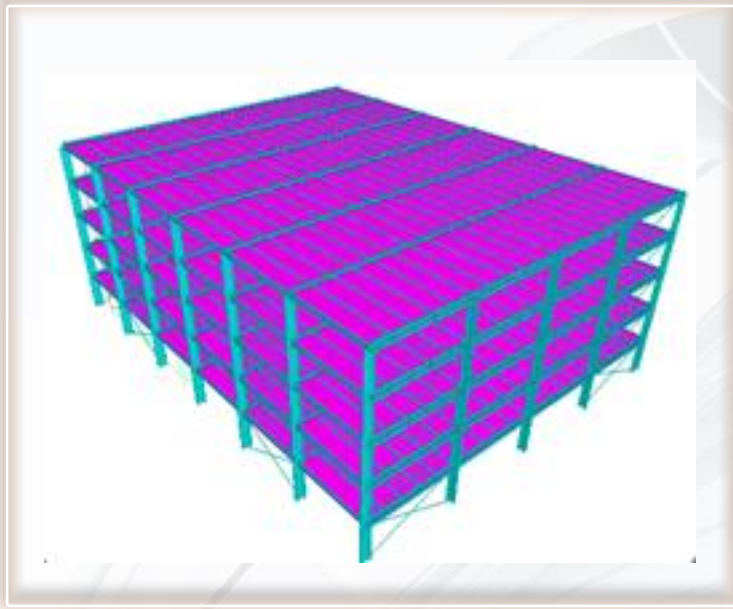
Where we are..

- ✓ FY21 sales volume was 1.6Mn ton
- ✓ Current capacity is 2.6Mn ton
- ✓ Future capacity addition linked to market potential

Our strengths..

- ✓ New innovative products
- ✓ Branding
- ✓ Fixed costs of unutilized capacity factoring in
- ✓ Low gearing
- ✓ Solid FCF generation

On-Going Enquiries



Hospital (2mn sqft)

To be completed within 6 months
Structure to be completed within 50 days



Oxygen Plant (0.1mn sqft)

Structured completed in 15 days
More enquiries inline

Benefits of using APL Apollo tubes in above steel structures

- 20% less steel consumption in structure
- 10% savings in total project cost
- Faster project completion
- Environment friendly construction

Oxygen Plant Delhi



Weight of the steel structure completely made of steel tube ranges in 3 to 4 kg/sq ft. which is lower than weight of conventional steel building

All components of oxygen plant's steel structure are made up of APL Apollo steel tube

Hospitals Project – Delhi

- Multiple Hospitals to be constructed in 150 days (Tender out)
- 2.2mn sq ft Built-up area to be construct using Tubular Technology
- Dry Wall will be erected on Tubular Steel Structure
- Deck Slab will cast on Tubular Steel structure
- All Steel Fabrication work will take place at Fabrication Shop
- Only Assembly of structure will take place at site (Zero On-site welding)

Project Details		
Total Build up Area	2,211,434	Sq ft
Steel Tube Consumption	4.5	kg/sqft
Steel Tube Quantity	10,000	Ton
Fabricators Capacity	480	Ton/Day
Steel Supply to 7 fabricator	480	Ton/Day
Supply Completion	30	days
Dispatch Completion	4th-8th	Weeks
Erection Completion	5th-9th	Weeks

Tubular Structure in 50 Days (Process flow)



Tube Manufacturing

Production of 6,000 ton ERW tubes per day



Fabrication

Tubes are sand blasted, then connected using connectors

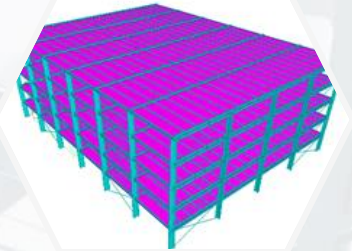


Civil Foundation

Civil Foundation & Arrangement of anchor bolts at site to install tube columns



Hospital Building Structure



Transfer of cut to length tubes to Fabricator's workshop



Transfer of structure parts to the site



CTL Line

Cutting of tubes into desired length at APL Apollo plant to minimise wastages



Painting

Connected structures are painted



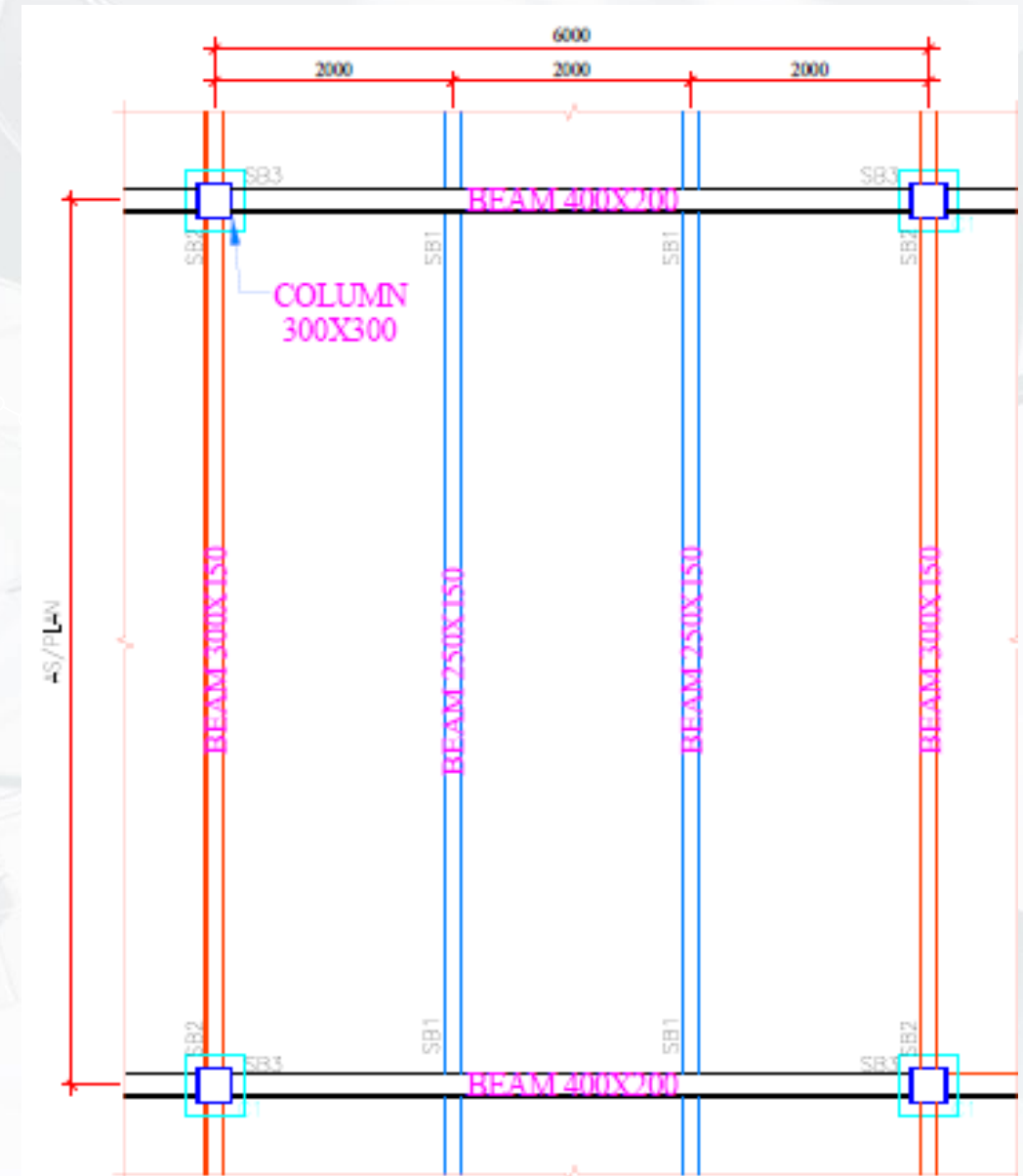
Site Erection

Zero on-site fabrication/Welding; Erection using bolting connections



Design Features -> Faster Construction/Low Cost

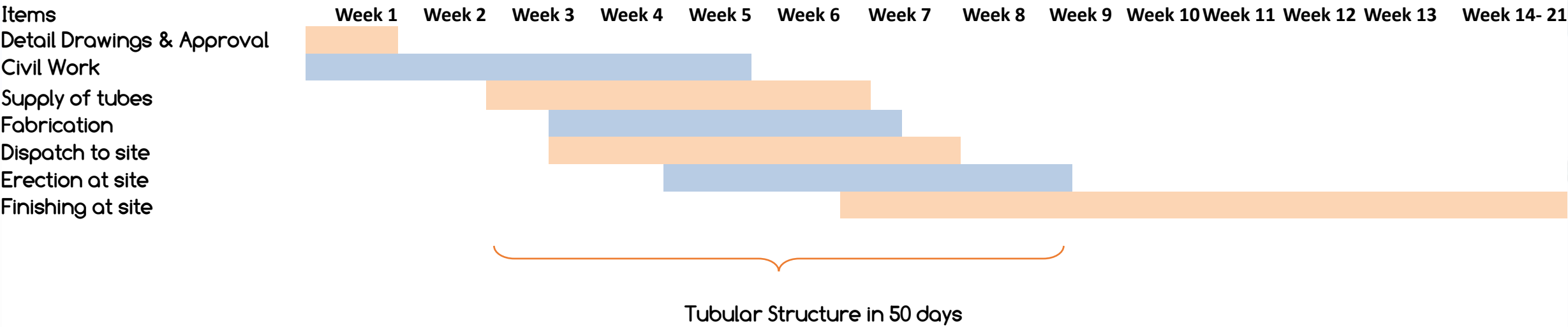
1. Minimum no. of Sections: Main Skelton built using 4 Sizes of Structure Steel Tubes
Tube Sizes are 300X300mm, 400X200mm, 300X150mm & 250X150mm
 - **Benefit 1:** Fabricator can order tubes without any MOQ constraint
 - **Benefit 2:** No need for fabricator to maintain inventory levels
 - **Benefit 3:** Ease in fabrication
2. Standardization: Standard grid size of 6.0m X7.5mtr for wards
 - **Benefit 1:** Time saving in Detailing, Fabrication & Erection
 - **Benefit 2:** Ease in Erection
3. No Wastage: Tubes to be delivered with cut-to-length sizes (as per actual design)
 - **Benefit 1:** Reduce time as well as wastage



Tentative Construction Schedule – 50 Days



Area 2.2mn sq ft



FINANCIAL PRIORITIES & PERFORMANCE



Financial Priorities under Strong Governance

Growth

- Profitable Organic Growth
- Commitment to R&D and Talent
- Innovate products to replace conventional construction methods



Earnings

- Drive sustainable EPS growth
- Attain earnings objectives across economic cycles
- Achieve ROCE \geq 30%

Capital Allocation

- Focus on Free Cash Flow Generation
- Sound Leverage and Working Capital Ratio
- Consistent dividend payouts to shareholders

On path of Premiumization..

1

Moving towards solution driven offerings and heavy weight structural steel tubing products for large real estate and infra projects

2

Focusing on products which are aesthetically appealing and command premium

4

Leveraging APL Apollo brand equity

3

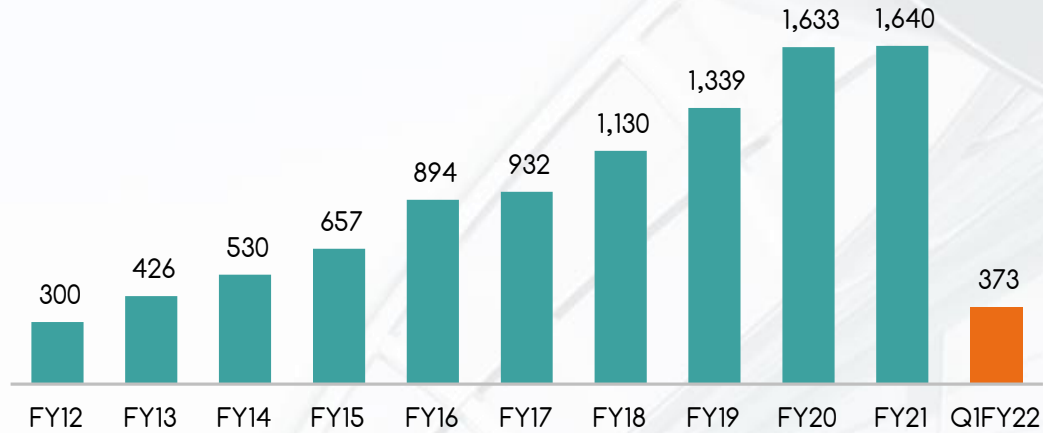
Consumer centric approach

5

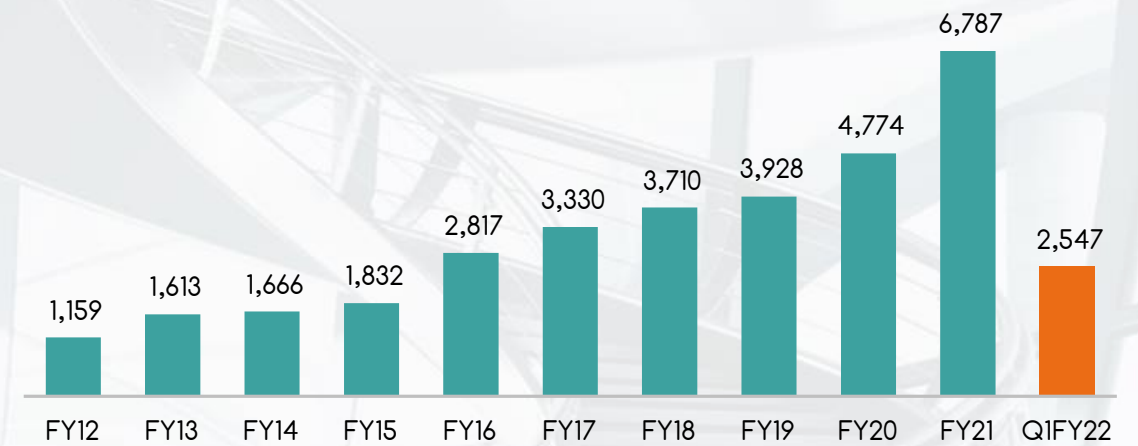
Innovative sizes/new applications where competition is behind curve

Growing Strength to Strength

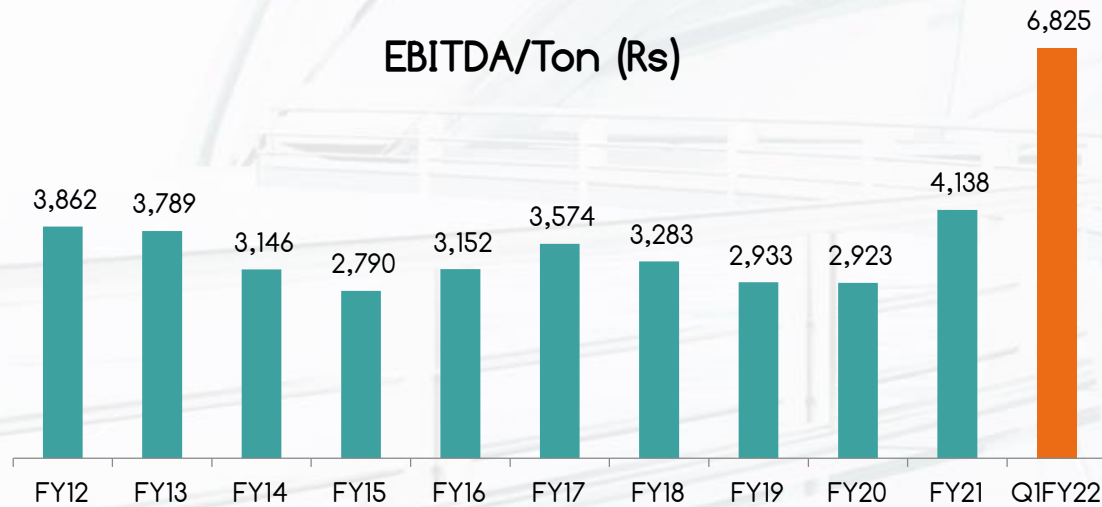
Volume (k tons)



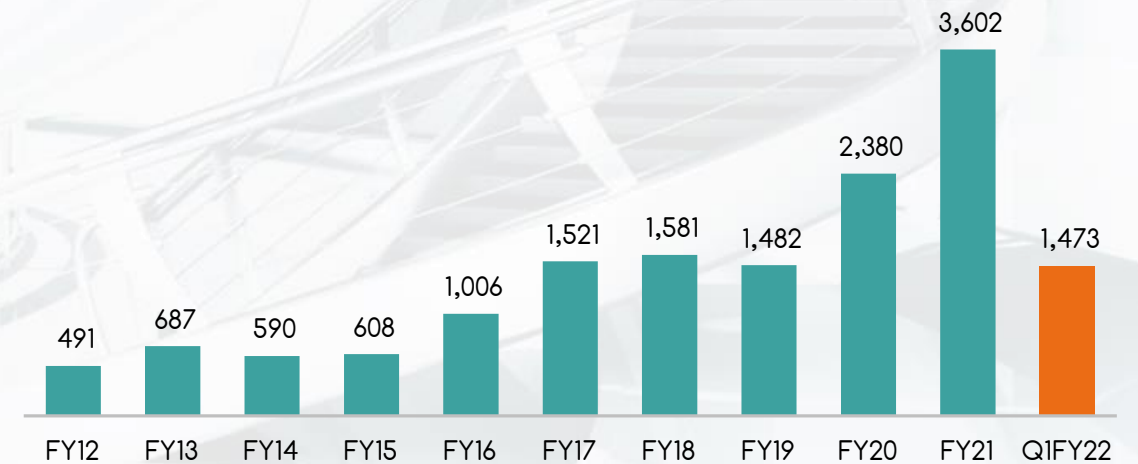
EBITDA (Rsm)



EBITDA/Ton (Rs)



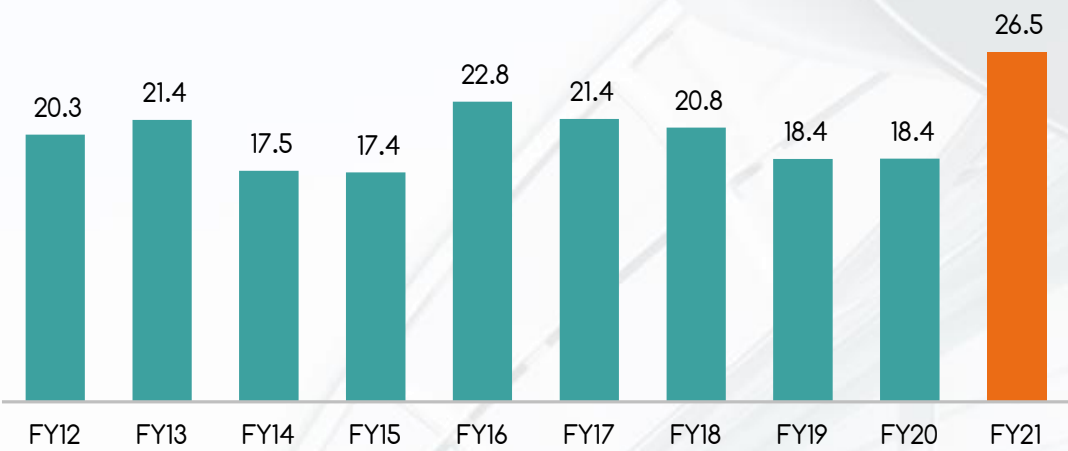
Net Profit (Rsm)



Note 1: This data is based on the Consolidated Financial data of the Company; Interest coverage is calculated on EBIT
Note 2: Sales Volume and Financials are on consolidated basis and Net Profit is after Minority Interest

Growing Strength to Strength

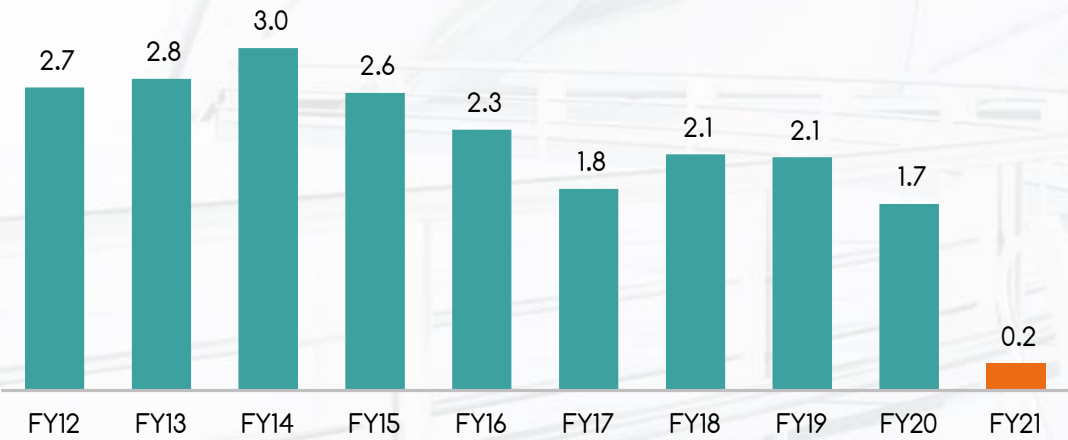
ROCE (%)



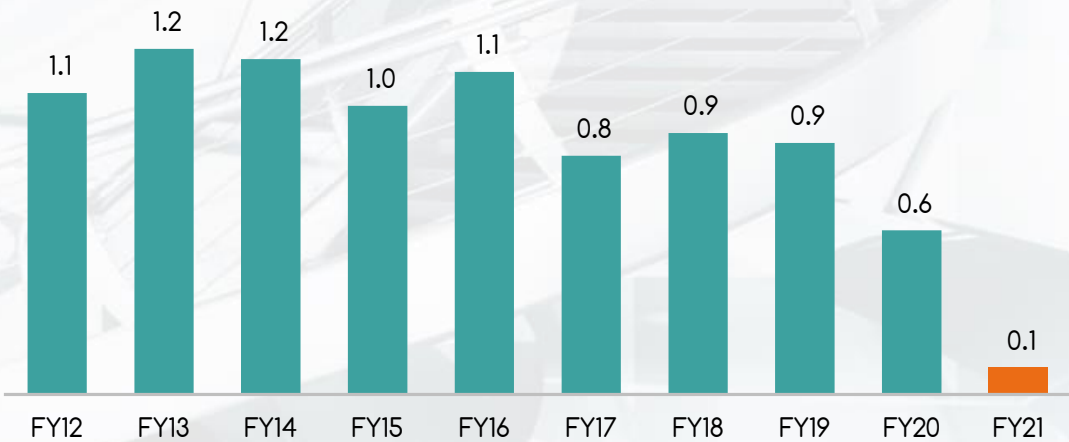
ROE (%)



Net Debt/EBITDA (x)



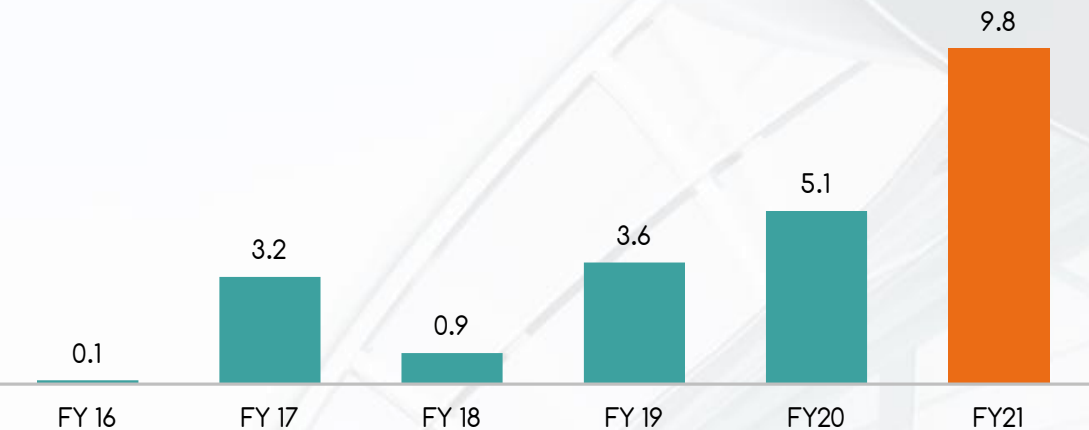
Net Debt/Equity (x)



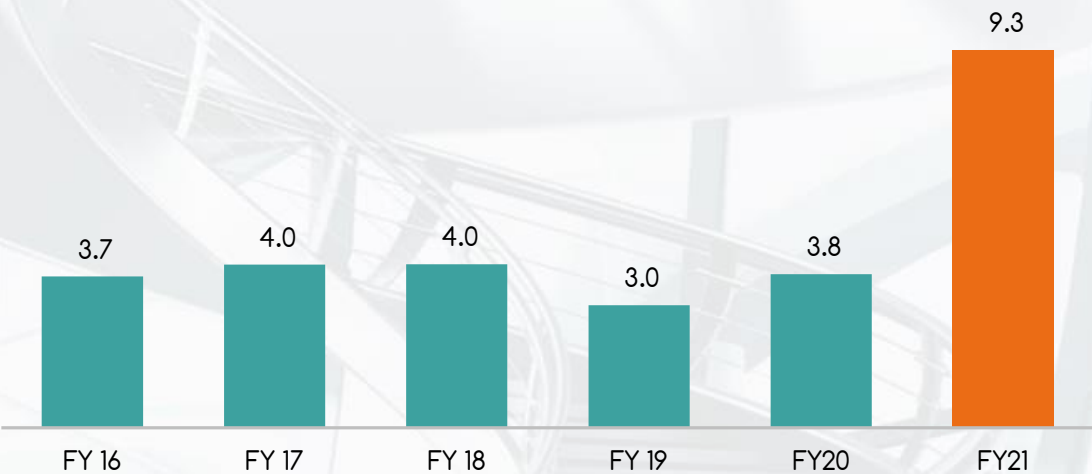
Note: This data is based on the Consolidated Financial data of the Company

Growing Strength to Strength

Operating Cash Flow (Rs Bn)



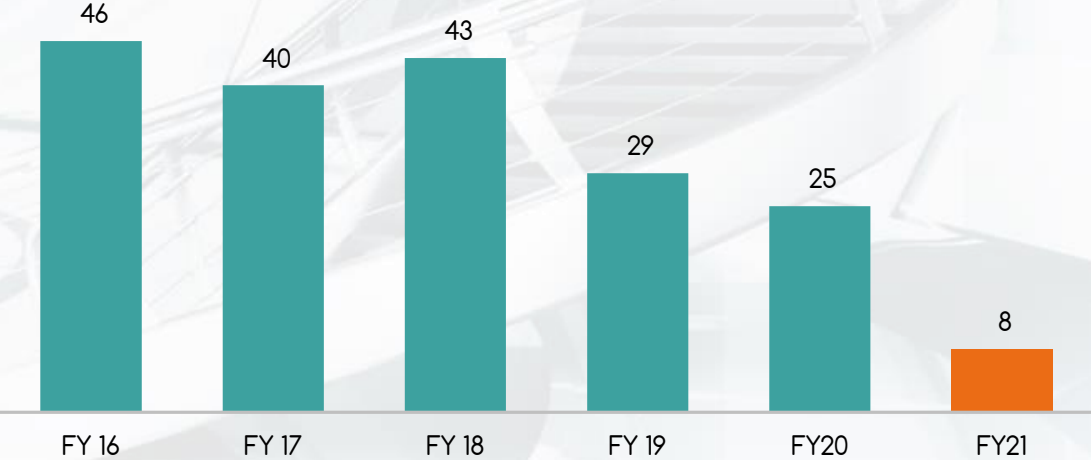
Interest Coverage Ratio (x)



Net Debt (Rs Bn)



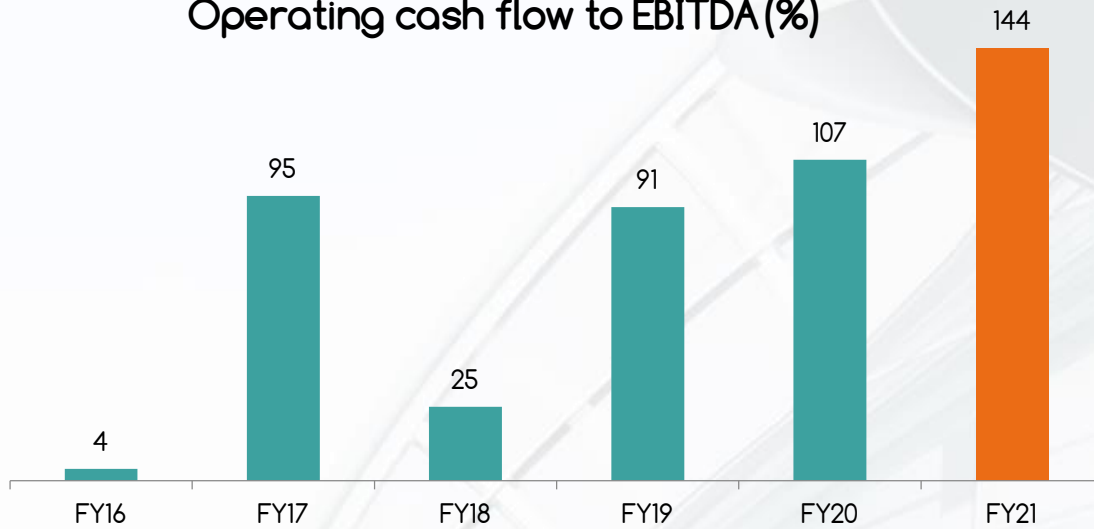
Net Working Capital (Days)



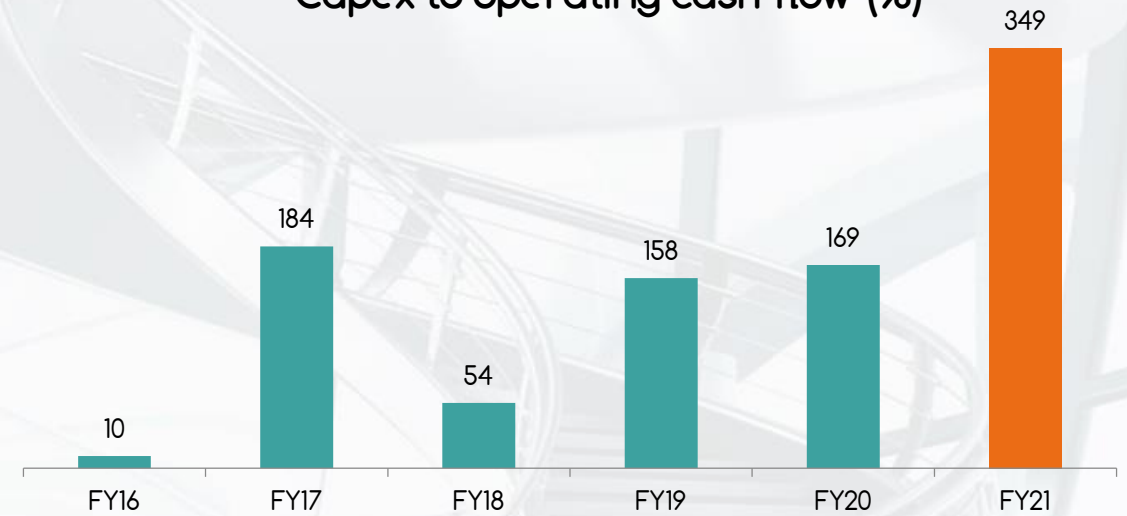
Note: This data is based on the Consolidated Financial data of the Company

Growing Strength to Strength

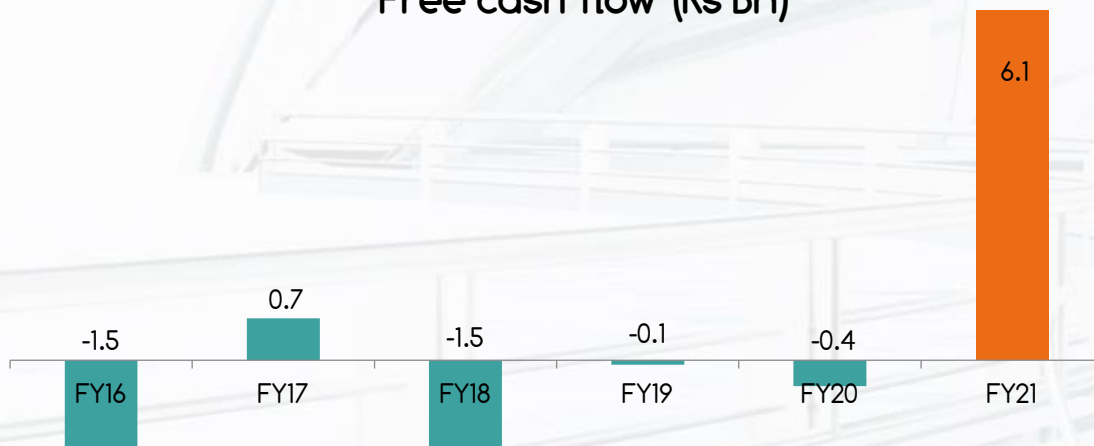
Operating cash flow to EBITDA (%)



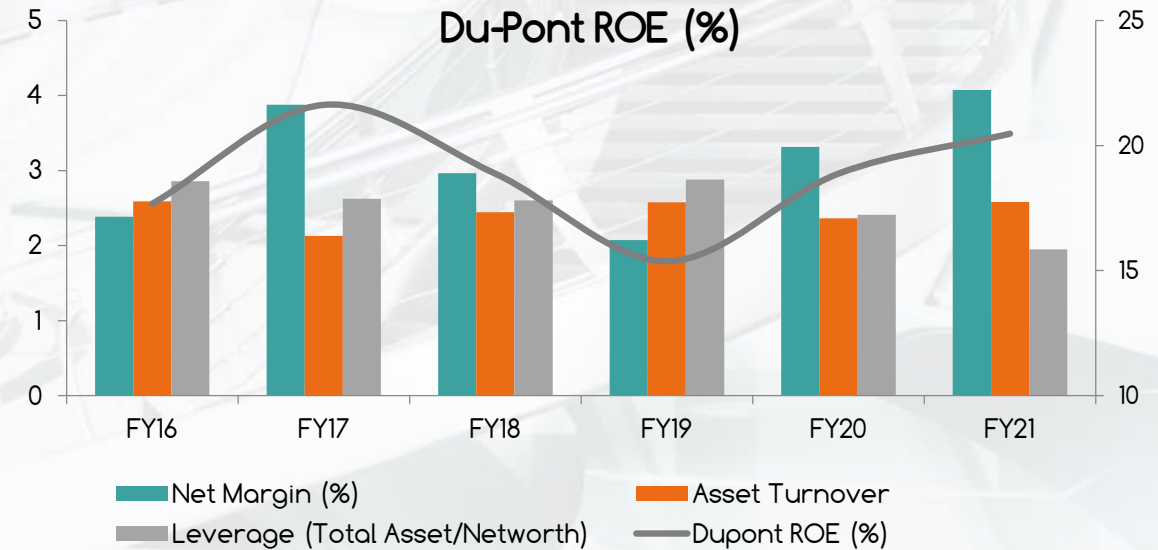
Capex to operating cash flow (%)



Free cash flow (Rs Bn)



Du-Pont ROE (%)



De-commoditizing Product Portfolio

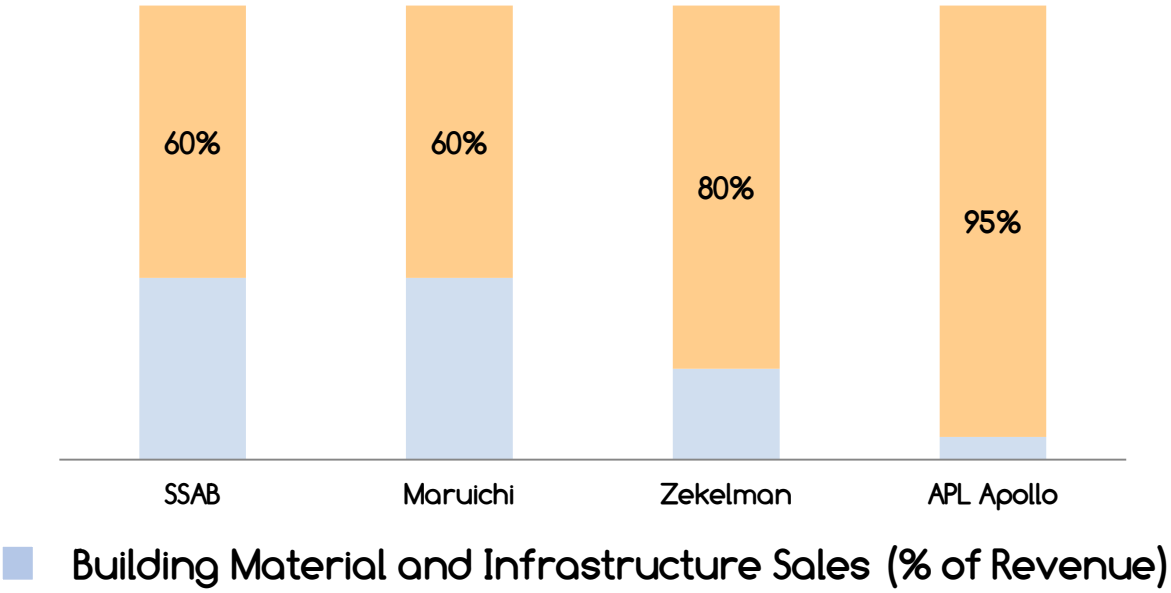
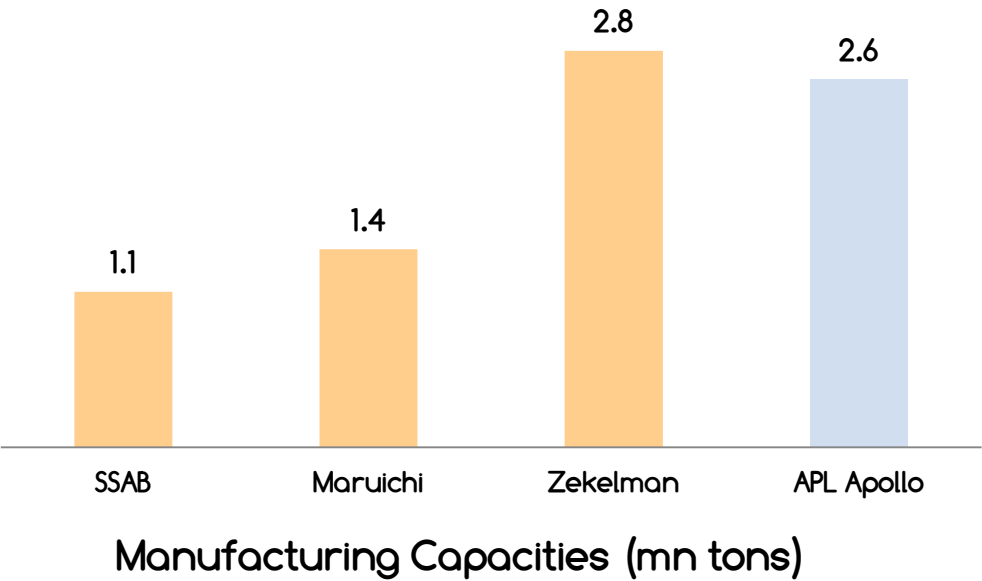
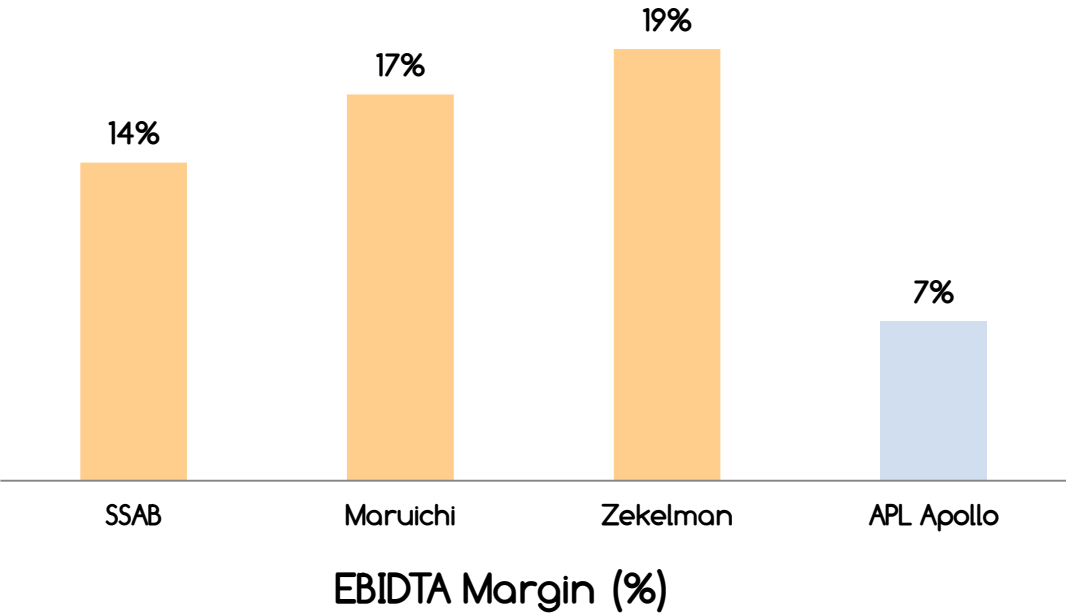
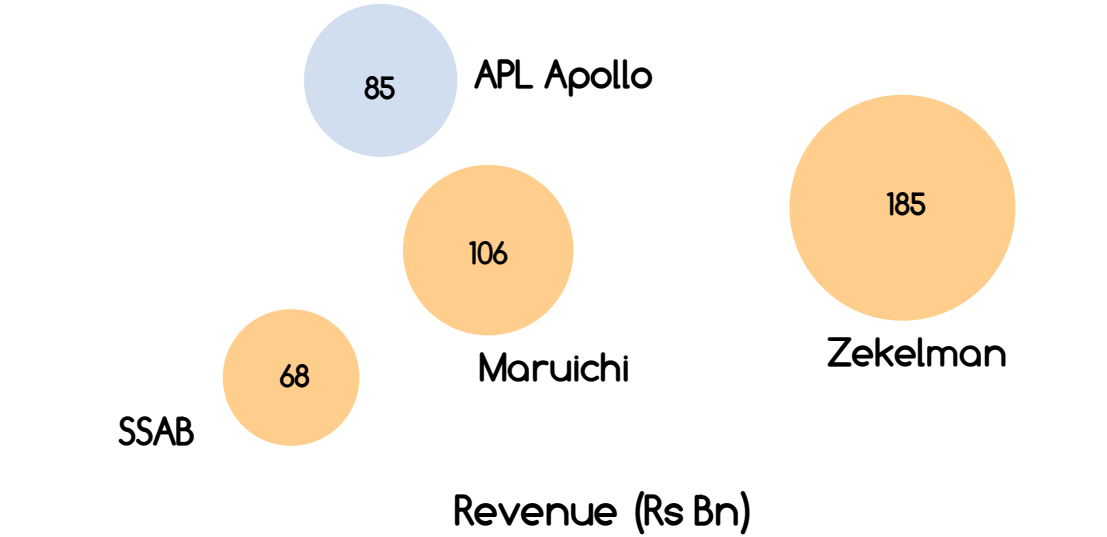
Gradually improved our value added product contribution

Product Category	Application	FY18			FY19			FY20			FY21			Q1FY22			Annual Capacity (KTon)
		Sales Mix (%)	Volume (KTon)	EBITDA/Ton (Rs)	Sales Mix (%)	Volume (KTon)	EBITDA/Ton (Rs)	Sales Mix (%)	Volume (KTon)	EBITDA/Ton (Rs)	Sales Mix (%)	Volume (KTon)	EBITDA/Ton (Rs)	Sales Mix (%)	Volume (KTon)	EBITDA/Ton (Rs)	
Apollo Structural	Heavy Structures	5	52	3,707	6	80	3,775	6	101	4,000	6	95	4,721	5	19	8,000	200
	Light Structures	6	70	3,658	8	108	3,707	5	87	3,800	13	213	4,717	11	40	6,300	430
	General Structures	58	656	2,052	58	777	1,615	55	898	1,361	43	713	1,658	33	124	3,125	1,000
Apollo Z	Rust-proof structures	21	241	5,691	21	279	5,568	20	333	5,021	18	294	6,728	23	85	8,990	400
	Rust-proof sheet	-	0	4,704	-	3	4,703	0	2	5,000	1	23	4,720	8	30	6,000	100
Apollo Tricoat	Home improvement	-	-	-	-	-	-	7	113	6,589	14	231	7,072	16	59	11,716	350
Apollo Galv	Agri/Industrial	10	111	4,880	7	92	4,362	6	99	3,952	4	71	6,040	4	17	7,257	120
Total		100	1,130	3,283	100	1,339	2,933	100	1,633	2,923	100	1,640	4,138	100	373	6,825	2,600

Standard products with EBITDA less than Rs 3,200/ Ton

Value added products with EBITDA more than Rs 6,000/Ton

Global Peer Benchmarking



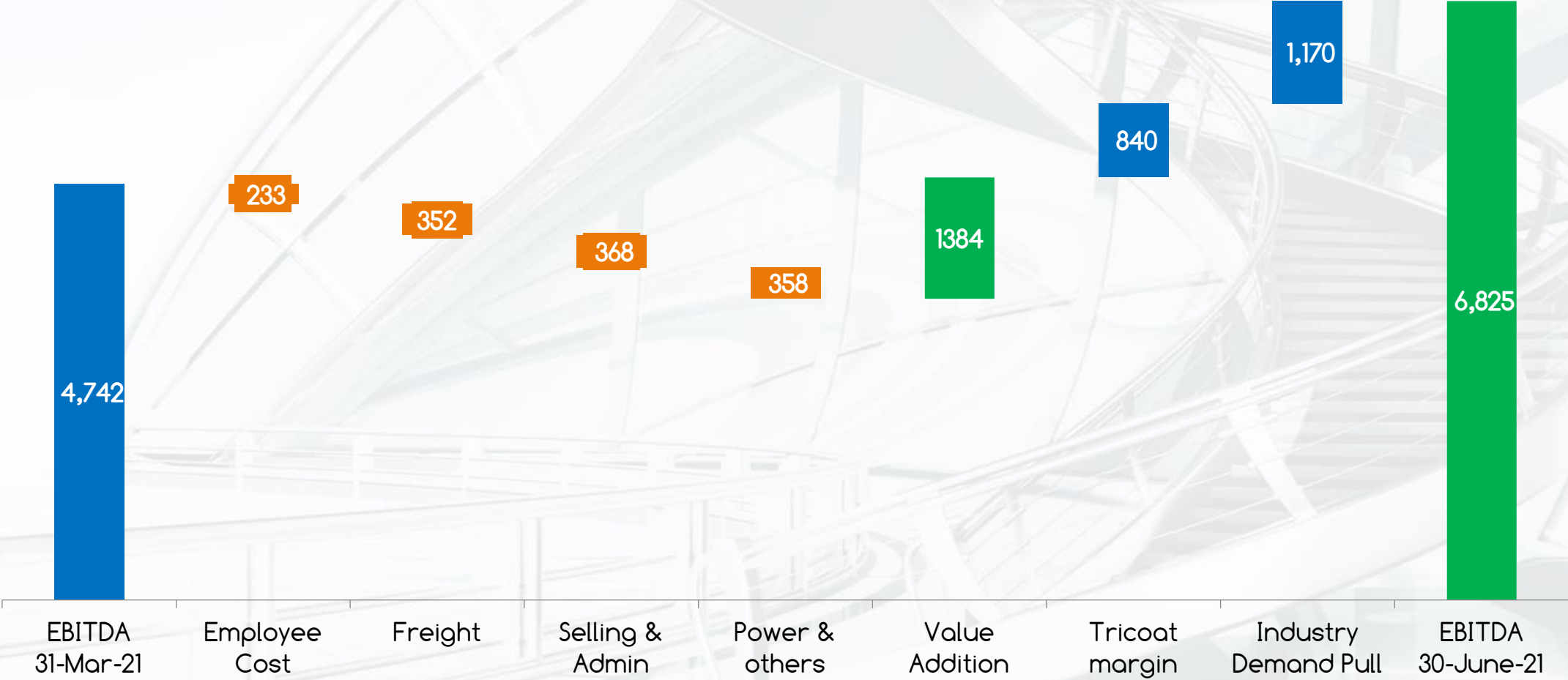
Balance Sheet & Cash Flow Statement (Consolidated)

P&L Statement (Rsm)	QIFY22	FY21
Sales Volume (k Ton)	373	1,640
Net Revenue	25,343	84,998
Raw Material Costs	20,771	71,648
Employee Costs	359	1,296
Other expenses	1,666	5,266
EBITDA	2,547	6,787
EBITDA/ton (Rs)	6,825	4,138
Other Income	102	359
Interest Cost	128	661
Depreciation	265	1,028
PBT	2,256	5,458
Tax	572	1,381
Net Profit	1,684	4,077
Minority Interest (MI)	211	475
Net Profit (after MI)	1,473	3,602

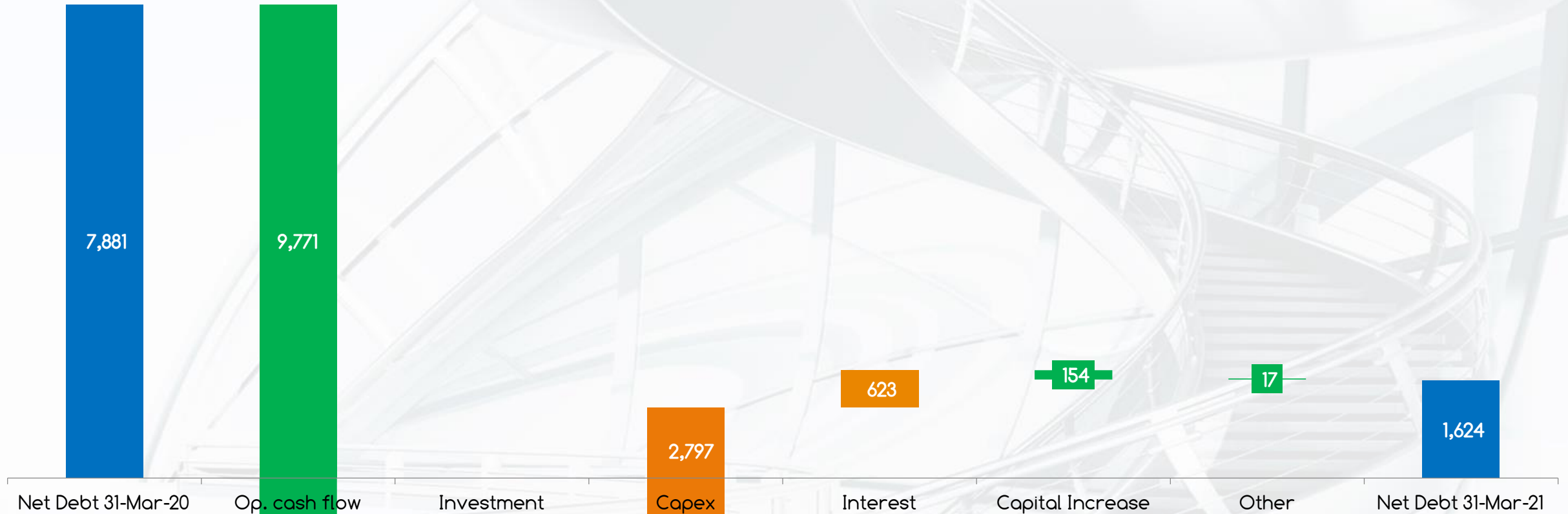
Balance Sheet - Assets (Rsm)	FY21	FY20
Cash & Bank Balance	3,579	456
Receivables	1,306	4,764
Inventories	7,599	7,842
Other current assets	1,507	1,422
Fixed assets (net)	16,091	14,812
Right to use Assets	949	971
Investments	15	15
Other assets/goodwill	2,943	2,379
Total Assets	33,990	32,660
Balance Sheet - Liabilities (Rsm)	FY21	FY20
Trade payables	7,859	7,644
Other current liabilities	557	309
Debt	5,203	8,338
Others	2,041	1,854
Minority Interest/Provision	1,383	954
Shareholders' funds	16,947	13,562
Total Equity & Liabilities	33,990	32,660

Cash Flow Statement (Rsm)	FY21	FY20
EBITDA	6,787	4,774
Accounts receivables	3,470	846
Inventory	232	284
Other WC changes	117	-215
Tax	-1,195	-816
Other Income	359	222
Operating cash flow	9,771	5,095
Capex	-2,798	-3,014
Investments	-265	-1,335
Interest	-623	-1,193
Free cash flow	6,086	-448
Dividend payments	0	-411
Capital increase	154	1,775
Tricoat consolidation/Others	18	-694
Net change in cash flow	6,258	221
Net debt beginning	-7,882	-8,104
Net debt end	-1,624	-7,882

EBITDA Bridge (Rs/Ton)



Consolidated Cash Flow Bridge (Rsm)



Business continues to generate strong operational cash flows



Capex being funded from internal cash flows

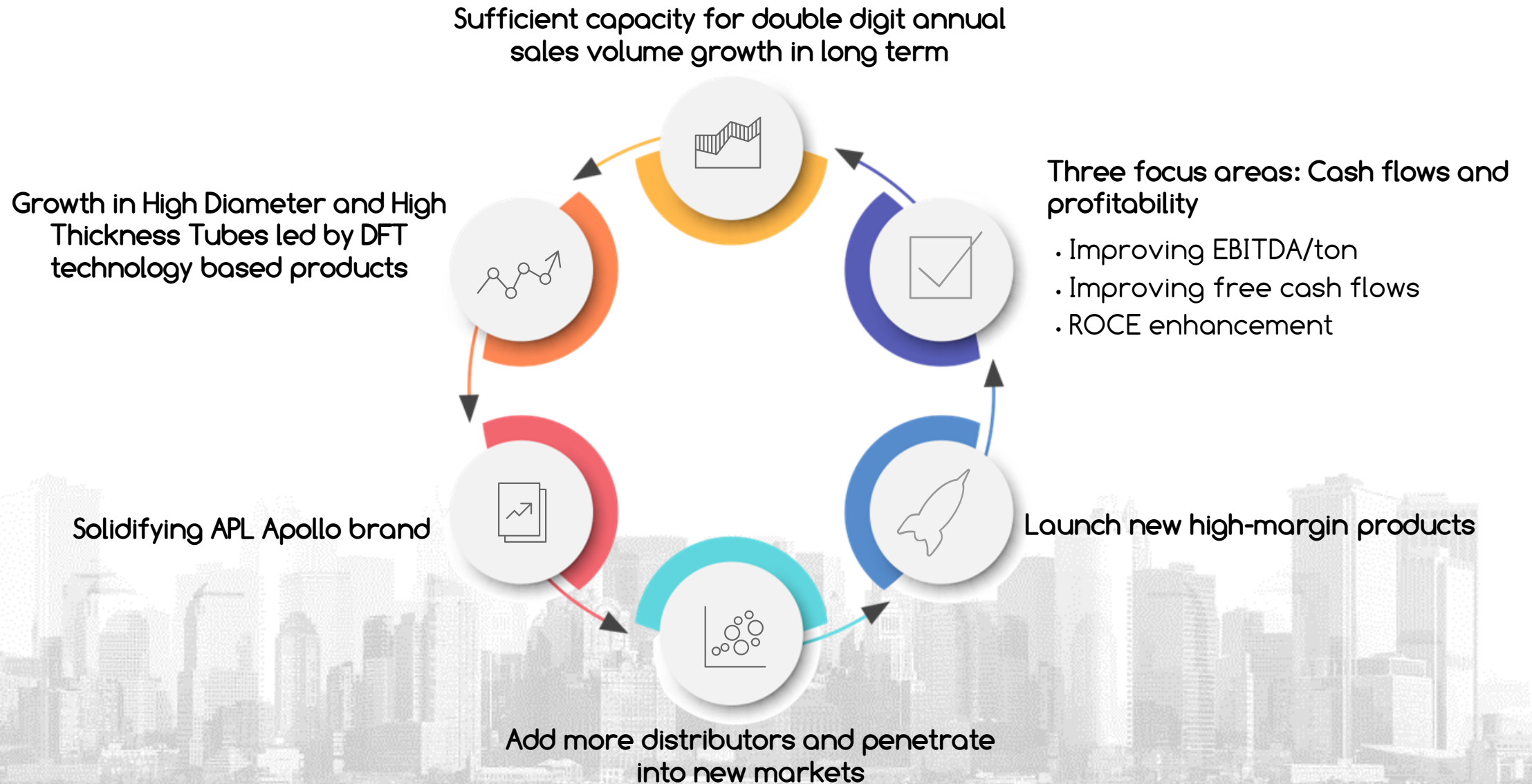


Net debt declined 79% on solid free cash flow generation

Key Takeaways

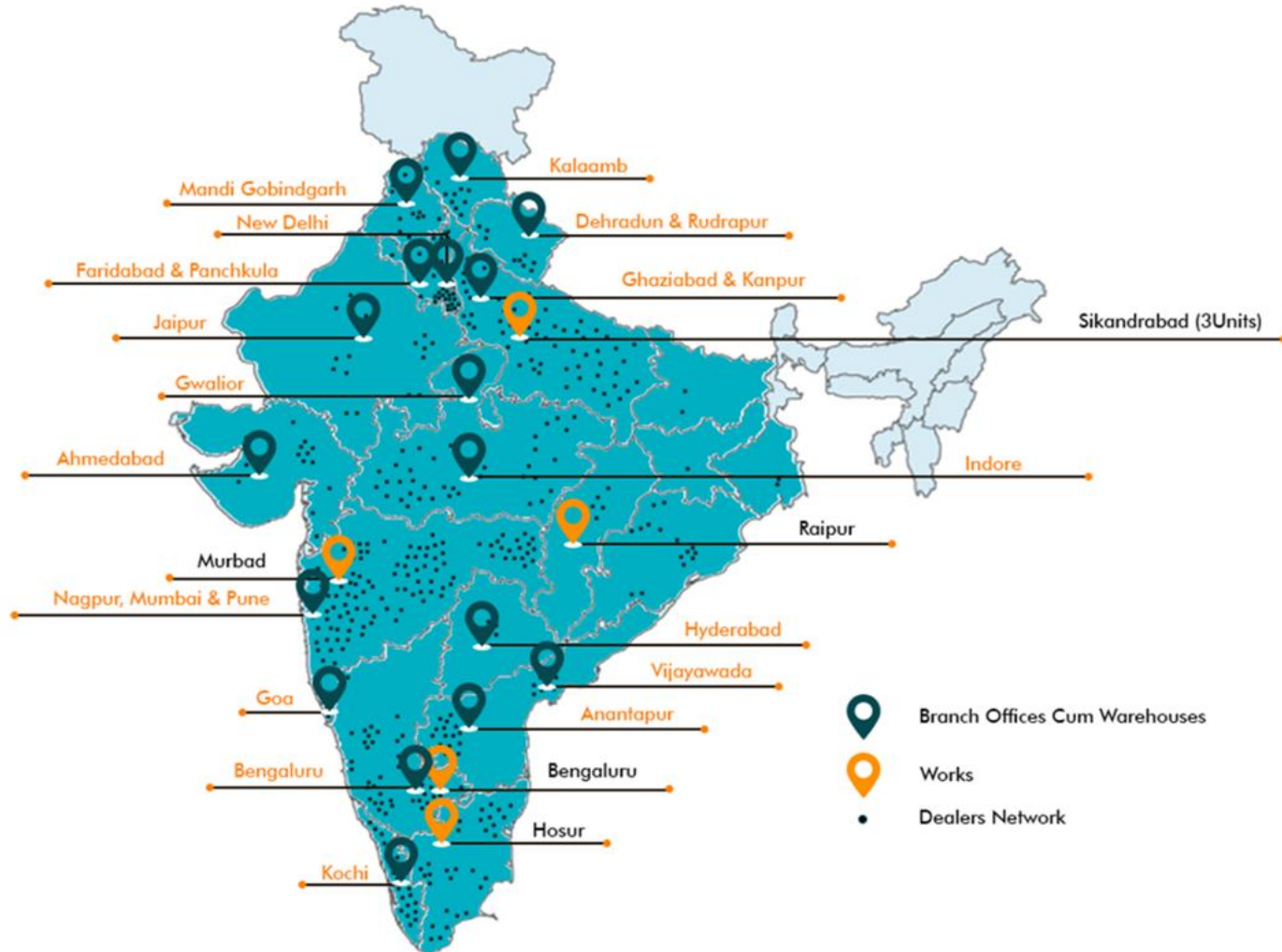


Solid Future Outlook



Enhancing Presence and Unlocking Opportunities

Local Market Presence aided by 3-tier Distribution and Solid Supply Chain Mechanism



800+

Distributors

50,000+

Retailers and Fabricators

300

Towns and Cities

APL APOLLO & APOLLO TRICOAT MERGER



Transaction Highlights

- The Board approved the merger of Shri Lakshmi Metal Udyog Limited and Apollo Tricoat Tubes Limited (Apollo Tricoat) with APL Apollo Tubes Limited (APL Apollo) on 27 February 2021
- Apollo Tricoat's minority shareholders will receive for each equity share held:
 - One equity share in APL Apollo
 - Implied premium of 16% to previous closing price for Apollo Tricoat's shareholders
 - Increase of 10.8% in APL Apollo's share capital
- Pro-forma ownership in APL Apollo:
 - Existing APL Apollo shareholders 89.2%
 - Apollo Tricoat shareholders 10.8%

Transaction Highlights

- Effected by way of a Scheme of Amalgamation
- Conditional on shareholder approval at each of APL Apollo and Apollo Tricoat, as well as regulatory approvals
- Transaction governance in line with Indian regulations and best practices
 - Big Four Accounting firm KPMG Assurance and Consulting Services LLP appointed as merger advisor
 - Renowned Firm SSPA & Co. Chartered Accountants appointed as an independent valuer
- Expected to close in FY2022
- Appointed date for merger: 1st April 2021
- Amalgamation a tax neutral transaction

Strategic Rationale

Simplification of group structure

Potential re-rating to benefit all shareholders

Cost efficiencies to boost overall margins

Stronger balance sheet lowers overall cost of capital

Increased cross-sell opportunities

Strategic Rationale
APL Apollo
&
Apollo Tricoat

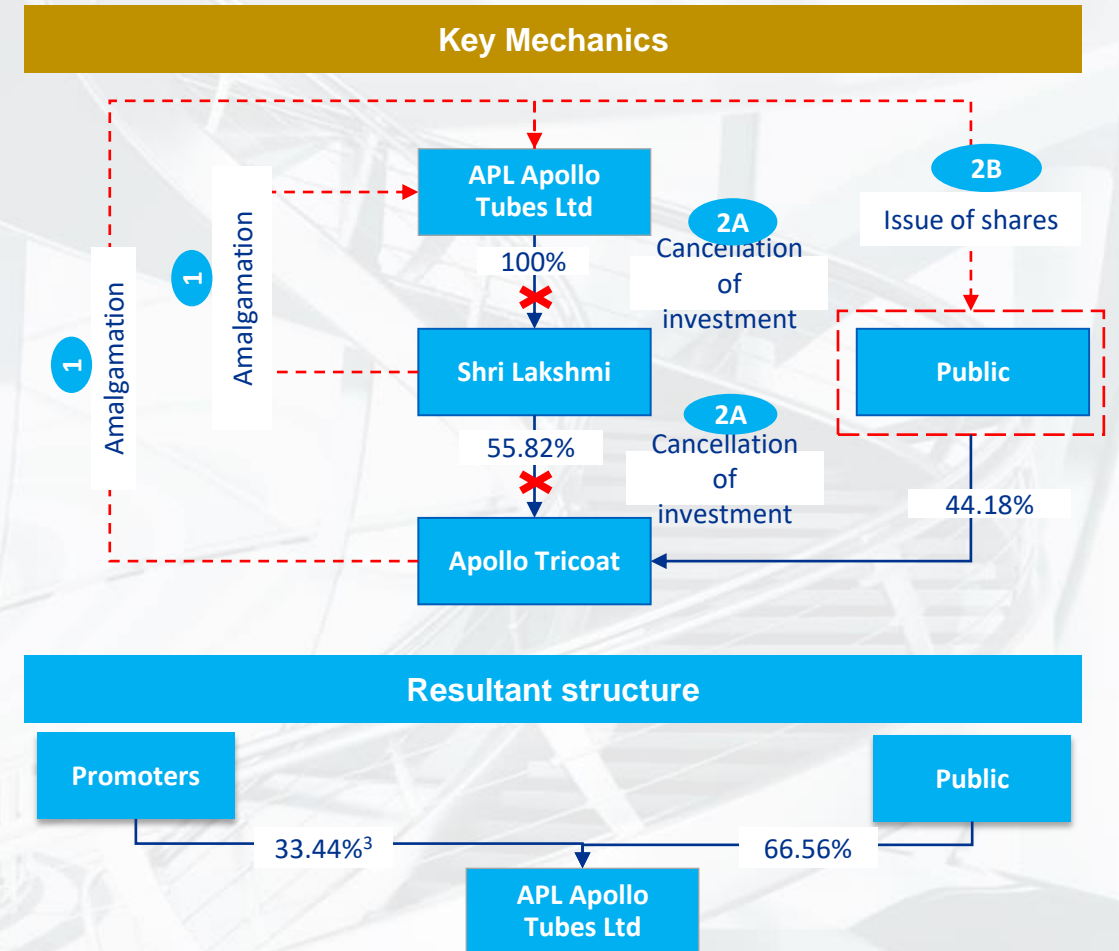
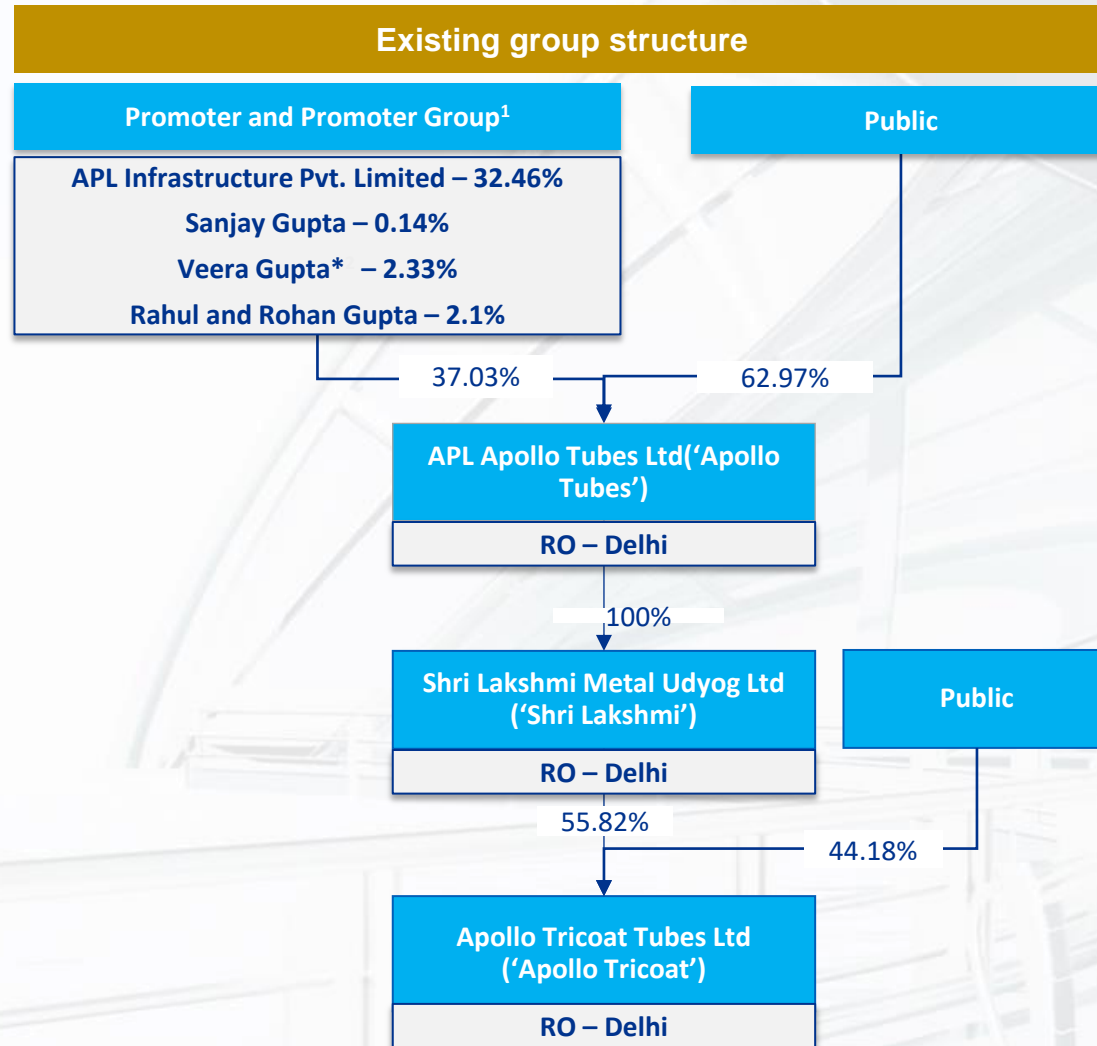
Creation of stronger platform for growth

Ability to offer innovative products resulting in higher margins

Greater financial flexibility for sustained growth

Increased size: Economies of scale

Merger Arrangements



Source: Shareholding pattern as per public announcement dated February 18, 2021

*Veera Gupta is not part of promoter family

Benefit for APL Apollo Share holders

- EPS Accretive: Net profit increase by 13.5%, Dilution of 9.7%
- ROE Accretive: 100% of Apollo's Tricoat profit to boost return profile
- Margin Accretive: Apollo Tricoat's high margin products to lift APL Apollo's profitability
- Addition of innovative value added products to APL Apollo's portfolio
- Apollo Tricoat's B2C centric approach will enhance Group's brand equity

APL APOLLO **ESG Engagement**



Materiality Assessment

RESPONSIBLE BUSINESS

Corporate Governance |
Market Presence | Economic
Performance

RESPONSIBLE OPERATIONS

Energy Management |
Water and Effluent
Management |
Emissions Management |
Waste Management |
Environmental Compliance

RESPONSIBLE EMPLOYEMENT

Health and Safety |
Labour Relations and | Human
Rights |
Training and Education |
Diversity and Equal
Opportunity

RESPONSIBILITY TOWARDS COMMUNITIES

Local Communities





Stakeholder Dialogue



ESG Framework



ESG Performance Indicators and Targets

 RESPONSIBLE BUSINESS	PERFORMANCE INDICATORS		TARGETS
	Corporate Governance		
	Number of cases in violation of code of conduct		Zero cases of violation of code of conduct
	Average training hours per employee on Code of Conduct		Yearly training on Code of Conduct for all employees
 RESPONSIBLE OPERATIONS	PERFORMANCE INDICATORS		TARGETS
	Energy Management		
	Number of units used from renewable energy sources (solar, wind)		All plants to have access to renewable energy by 2025
	Water & Effluent		
	Number of sites where Rainwater Water Harvesting facility have been installed		Rainwater harvesting to be installed at all units by 2025
	Number of sites where Zero Liquid Discharge (ZLD) facilities have been installed		All units to be ZLD facilities by 2025
	Emissions		
	GHG Emissions (Scope 3)		Start monitoring Scope 3 emissions by 2022
	Air Emissions		Maintain SOx, NOx and PM within permissible limits
	Environmental Compliance Management		
	Number of cases in violation of environment regulations		Zero incidents of non-compliance

ESG Performance Indicators and Targets

 RESPONSIBLE EMPLOYMENT	PERFORMANCE INDICATORS	TARGETS
	Health & Safety	
	Lost time Injuries	Achieving Zero Incident and Zero Harm by 2025
	Average training hours per employee to site employees on health and safety	Provide 4 hours of safety training (per site employee) to site employees
	Average training hours per employee to corporate employees on health and safety	Provide 2 hours of safety training (per employee) to corporate employees
	Labour Relations and Human Rights	
	Regulatory compliance of labour laws	100% compliance to all labour legal requirements
	Average training hours per employee on human rights	Provide 1 hours of training per employee on human rights
	Employee attrition	Maintain attrition rate below 5%
	Training and Education	
	Average trainings hours per employee on behavioral and technical aspects	Provide 4 hours of training to permanent employees
	Diversity and Equal Opportunity	
	Female to Male Ratio in permanent employee	Female workforce to be increase by 1% in the permanent employee category by 2025
 RESPONSIBILITY TOWARDS COMMUNITIES	PERFORMANCE INDICATORS	TARGETS
	Energy Management	
	Number of units used from renewable energy sources	All plants to have access to renewable energy by 2025

Strong Management

Directors (Non Executive)

Neeru Abrol

Director at TCNS Clothing Co Limited & others | Awarded best achiever by ICAI | 26 Yr experience in SAIL

Abhilash Lal

3 decades of professional experience in senior roles across financial services including banking, PE & others

Anil Kumar Bansal

Director of NABARD, Rockland Finesto Ltd & others
4 decades of experience in banking industry

Virendra Singh Jain

Board member of Dalmia Bharat Ltd |
Ex-Chairman of SAIL | Ex-Executive Director at IOC

Ashok Kumar Gupta

Steel industry veteran with 4 decades of experience
Worked as MD in APL Apollo in the past

Ameet Gupta

Wholetime Director at Havells India, India's largest electrical goods manufacturer

Rahul Gupta

A promising entrepreneur with an experience of around 5 years in Steel Tubes Manufacturing, currently MD of Apollo Tricoat Tubes Ltd.

Executive Team

Sanjay Gupta

Chairman & Managing Director

Arun Agrawal

Chief Operating Officer

Vinay Gupta

Director

Deepak Goyal

Chief Finance Officer

Romi Sehgal

Director

Anubhav Gupta

Chief Strategy Officer

Ashok Khushu

Head – New Projects

Ravindra Tiwari

Head-Sales & Marketing

Thank You

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