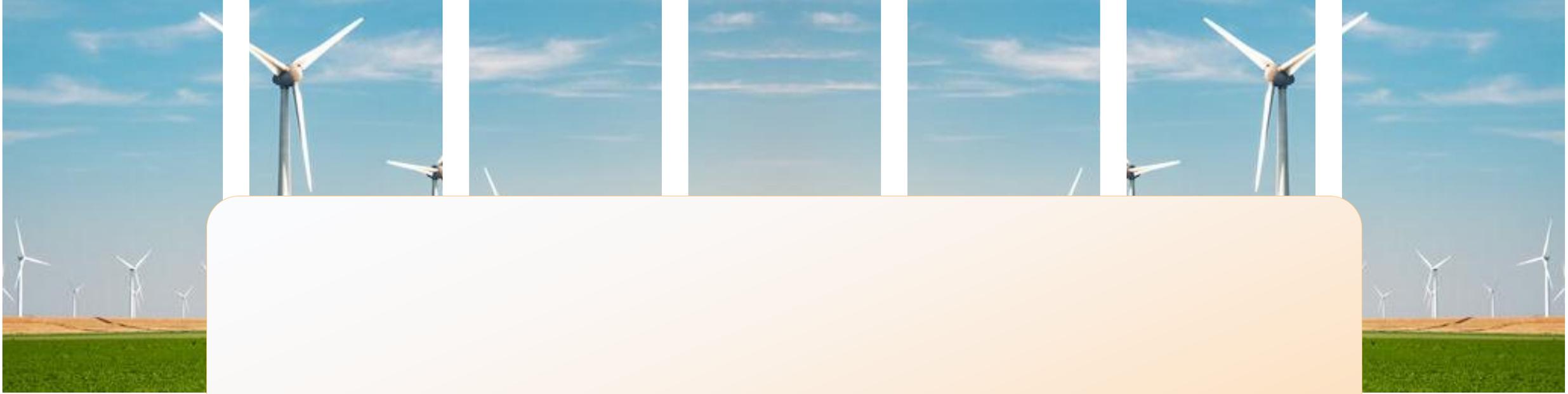


# EARNINGS PRESENTATION

Q4-FY25/FY25



# 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%**

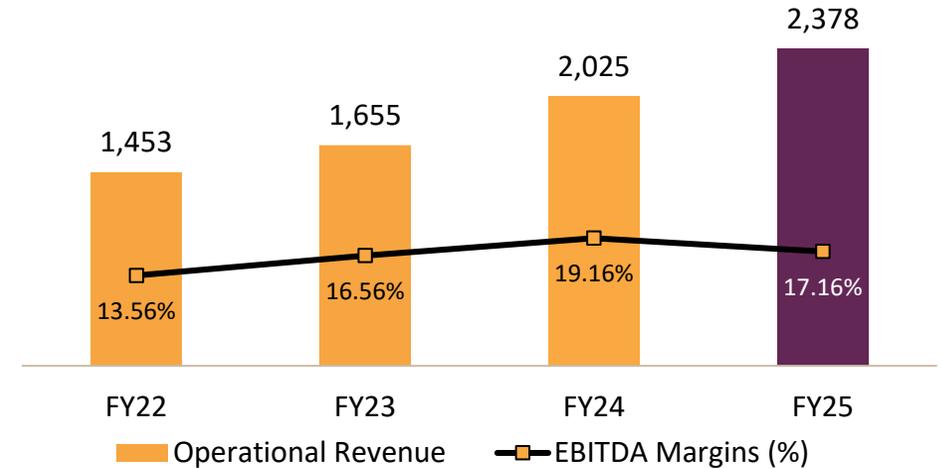
CAGR 2021-25

# COMPANY OVERVIEW

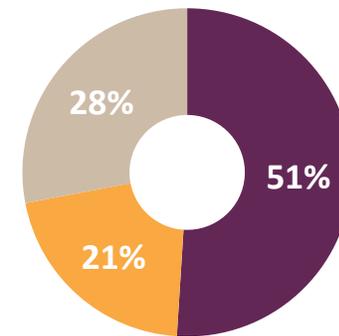


- Gala Precision Engineering is a renowned and preferred manufacturer of precision components in India.
- The company is supported by an experienced management team and a diverse, skilled workforce, driving consistent financial growth, operational efficiency, and high levels of repeat business.
- Leading 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 OEM's, 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 38% in FY25.
- 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 (%)

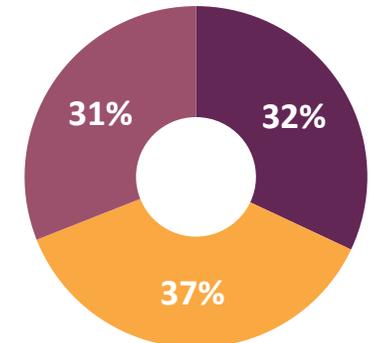


## Product Break Up (FY25)

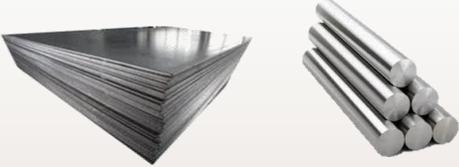


■ DSS ■ CSS ■ SFS

## End User Industry Revenue Break Up (FY25)



■ Industrial ■ Renewable Energy ■ Mobility

RAW MATERIAL	COMPONENTS	APPLICATIONS	END-USER INDUSTRIES
 <p data-bbox="160 639 300 661">Steel Sheets</p> <p data-bbox="428 646 542 668">Steel rods</p>	 <p data-bbox="800 625 958 646">DSS &amp; WLW</p>	<p data-bbox="1166 468 1689 532"><b>Renewables:</b> Yaw brakes, thrust bearing mechanism</p> <p data-bbox="1166 546 1709 611"><b>Industrial:</b> Transmission lines, dampening spring, elevator safety brakes</p> <p data-bbox="1166 618 1561 646"><b>Mobility:</b> Couplers and brakes</p>	<p data-bbox="1786 468 2351 532"><b>Renewables:</b> Wind turbines &amp; hydroelectric power plants</p> <p data-bbox="1786 546 2379 611"><b>Industrial:</b> Electricals, heavy machinery, &amp; off-highway vehicles</p> <p data-bbox="1786 618 2224 646"><b>Mobility:</b> Automobiles &amp; Railways</p>
 <p data-bbox="300 1011 428 1032">Steel wires</p>	 <p data-bbox="868 996 919 1018">CSS</p>	<p data-bbox="1166 875 1434 903"><b>Industrial:</b> Actuators</p> <p data-bbox="1166 918 1676 946"><b>Mobility:</b> Transmission, brakes, seating</p>	<p data-bbox="1786 853 2390 882"><b>Industrial:</b> Control valves, off-highway vehicles</p> <p data-bbox="1786 896 2390 953"><b>Mobility:</b> Automobiles, commercial vehicles &amp; railways</p>
 <p data-bbox="308 1268 422 1289">Steel rods</p>	 <p data-bbox="868 1296 919 1318">SFS</p>	<p data-bbox="1166 1118 1587 1182"><b>Renewables:</b> Foundation, tower, hydroelectric plants</p> <p data-bbox="1166 1189 1409 1218"><b>Industrial:</b> Bridges</p> <p data-bbox="1166 1225 1638 1253"><b>Mobility:</b> Railway tracks and bridges</p>	<p data-bbox="1786 1118 2326 1182"><b>Renewables:</b> Wind turbines, hydroelectric power plants &amp; solar panels</p> <p data-bbox="1786 1189 2288 1253"><b>Industrial:</b> Off-highway vehicles, heavy machinery &amp; electricals</p> <p data-bbox="1786 1260 2020 1289"><b>Mobility:</b> Railways</p>

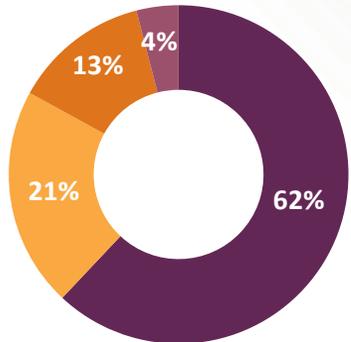
# TOTAL ADDRESSABLE MARKET (TAM)

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

# GEOGRAPHICAL PRESENCE



**FY25 Geographical Sales (%)**



■ India ■ Europe ■ America ■ ROW



**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**



**WADA PLANT, NEAR MUMBAI, MAHARASHTRA**

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

Spread Across  
(Land Area)

**6,718 Sq Mtrs**



**VALLAM PLANT, NEAR CHENNAI, TAMIL NADU**

**The trial run and development have started, and commercial production is expected to begin in June 2025**

# 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



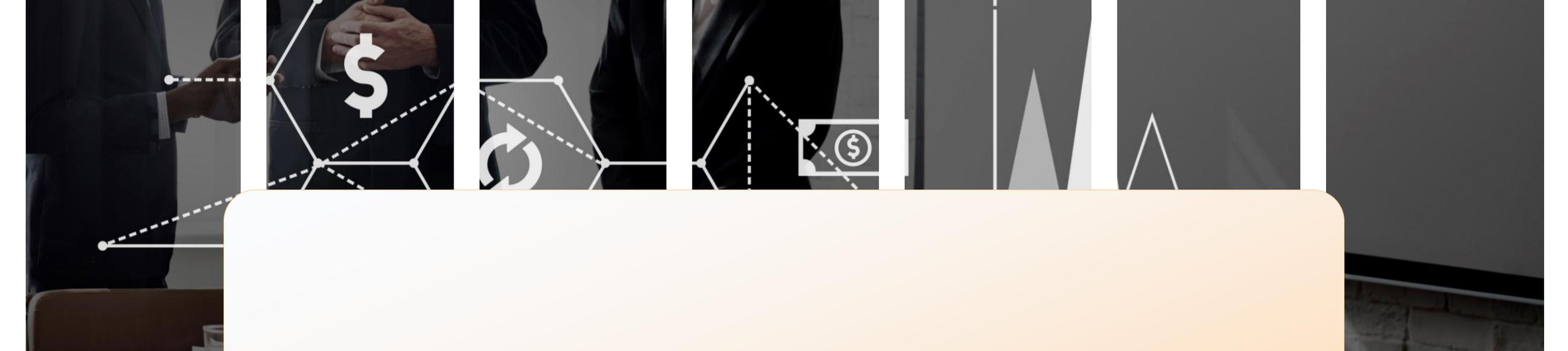
Expand manufacturing capacity at our existing facilities and set-up additional strategically located facility

## 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)	613.1
FD created in HDFC Bank	450.0
FD created in Yes Bank	145.0
Interest earned	0.1
Total (B)	1,208.2
Balance in the Monitoring Account A-B	4.2

## 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	133.4	236.6
Wada CAPEX	110.7	26.3	84.4
General Corporate Purposes	277.4	3.1	274.3
Total	1212.4	617.1	595.3

A background image showing a business meeting with several people in suits. Overlaid on this are various financial and business icons: a large dollar sign, a circular refresh icon, a document with a dollar sign, and several line graphs and bar charts. The central text is on a light orange rounded rectangle.

# FINANCIAL OVERVIEW



# Q4-FY25/FY25 FINANCIAL & OPERATIONAL HIGHLIGHTS



## Q4-FY25 Financial Performance

<b>Revenue from Operations</b> INR 753 Mn	<b>EBITDA</b> INR 127 Mn	<b>EBITDA Margin</b> 16.87%
<b>PAT</b> INR 100 Mn	<b>PAT Margin</b> 13.28%	<b>Diluted EPS</b> INR 8.41

## FY25 Financial Performance

<b>Revenue from Operations</b> INR 2,378 Mn	<b>EBITDA</b> INR 408 Mn	<b>EBITDA Margin</b> 17.16%
<b>PAT</b> INR 268 Mn	<b>PAT Margin</b> 11.27%	<b>Diluted EPS</b> INR 22.56

## Operational Highlights

- Q4-FY25 Revenue from Operations grew by 31% YoY and 30% QoQ
- Q4-FY25 Net profit grew by 45% YoY and 89% QoQ to INR 10 Cr
- SFS (Fastener Business) reported annual sales growth of 63% YoY, increasing from INR 400 Mn to INR 653 Mn.
- In the SFS segment, exports contributed 55% of FY25 sales, compared to 37% in FY24.
- Net Fixed Asset Turnover Ratio from existing operational plants improved to 3.65x for FY25, up from 3.05x in the previous period.
- Chennai plant was inaugurated on 27th February 2025; customer visits and audits for plant approval have commenced.
- Initiated Bolt development, targeting an additional addressable market of approximately USD 1 Bn. First order received from an industrial customer based in the USA.
- Approval received from an industrial customer for the SFS business; sales are scheduled to begin in Q1-FY26.
- A new product, Griplock Washer, was developed and commercialized for the construction equipment sector.

# QUARTERLY CONSOLIDATED STATEMENT OF PROFIT & LOSS



Particulars (INR Mn)	Q4-FY25	Q4-FY24	Y-O-Y	Q3-FY25	Q-O-Q
<b>Revenue from Operations</b>	<b>753</b>	<b>574</b>	<b>31.2%</b>	<b>581</b>	<b>29.6%</b>
Total Expenses	626	439	42.6%	504	24.2%
<b>EBITDA</b>	<b>127</b>	<b>135</b>	<b>(5.9)%</b>	<b>77</b>	<b>64.9%</b>
<b>EBITDA Margin (%)</b>	<b>16.87%</b>	<b>23.52%</b>	<b>(665) Bps</b>	<b>13.25%</b>	<b>362 Bps</b>
Other Income	15	4	NA	22	(31.8)%
Depreciation	20	17	17.6%	20	0.0%
Finance Cost	9	15	(40.0)%	6	50.0%
<b>Profit before Exceptional Items and Tax</b>	<b>113</b>	<b>107</b>	<b>5.6%</b>	<b>73</b>	<b>54.8%</b>
Exceptional Items (Net)	-	(25)	(100.0)%	(1)	(100.0)%
<b>PBT</b>	<b>113</b>	<b>82</b>	<b>37.8%</b>	<b>72</b>	<b>56.9%</b>
Tax	13	15	(13.3)%	19	(31.6)%
Non – Controlling Interest	-	(2)	(100.0)%	-	NA
<b>PAT before Exceptional Item</b>	<b>100</b>	<b>94</b>	<b>6.4%</b>	<b>54</b>	<b>85.2%</b>
<b>PAT Margin before Exceptional Item (%)</b>	<b>13.28%</b>	<b>16.38%</b>	<b>(310) Bps</b>	<b>9.29%</b>	<b>399 Bps</b>
<b>PAT after Exceptional Item</b>	<b>100</b>	<b>69</b>	<b>44.9%</b>	<b>53</b>	<b>88.7%</b>
<b>PAT Margin after Exceptional Item (%)</b>	<b>13.28%</b>	<b>12.02%</b>	<b>126 Bps</b>	<b>9.12%</b>	<b>416 Bps</b>
Other Comprehensive Income	(5)	2	NA	-	NA
<b>Total Comprehensive Income</b>	<b>95</b>	<b>71</b>	<b>33.8%</b>	<b>53</b>	<b>79.2%</b>
EPS (INR)(not annualised)	8.41	6.68	25.9%	4.60	82.8%

# ANNUAL CONSOLIDATED STATEMENT OF PROFIT & LOSS



Particulars (INR Mn)	FY25	FY24	Y-o-Y
<b>Revenue from Operations</b>	<b>2,378</b>	<b>2,025</b>	<b>17.4%</b>
Total Expenses	1,970	1,637	20.3%
<b>EBITDA</b>	<b>408</b>	<b>388</b>	<b>5.2%</b>
<b>EBITDA Margin (%)</b>	<b>17.16%</b>	<b>19.16%</b>	<b>(200) Bps</b>
Other Income	44	18	NA
Depreciation	80	69	15.9%
Finance Cost	38	61	(37.7)%
<b>Profit before Exceptional Items and Tax</b>	<b>334</b>	<b>276</b>	<b>21.0%</b>
Exceptional Items (Net)	(3)	(23)	(87.0)%
<b>PBT</b>	<b>331</b>	<b>253</b>	<b>30.8%</b>
Tax	63	33	90.9%
Non – Controlling Interest	-	(3)	NA
<b>PAT before Exceptional Item</b>	<b>271</b>	<b>246</b>	<b>10.2%</b>
<b>PAT Margin before Exceptional Item (%)</b>	<b>11.40%</b>	<b>12.15%</b>	<b>(75) Bps</b>
<b>PAT after Exceptional Item</b>	<b>268</b>	<b>223</b>	<b>20.2%</b>
<b>PAT Margin after Exceptional Item (%)</b>	<b>11.27%</b>	<b>11.01%</b>	<b>26 Bps</b>
Other Comprehensive Income	(4)	5	NA
<b>Total Comprehensive Income</b>	<b>264</b>	<b>228</b>	<b>15.8%</b>
EPS (INR)(not annualised)	22.56	21.77	3.6%

# HISTORICAL CONSOLIDATED STATEMENT OF PROFIT & LOSS



Particulars (INR Mn)	FY22	FY23	FY24	FY25
Revenue from Operations	1,453	1,655	2,025	2,378
Total Expenses	1,256	1,381	1,637	1,970
<b>EBITDA</b>	<b>197</b>	<b>274</b>	<b>388</b>	<b>408</b>
<b>EBITDA Margin (%)</b>	<b>13.56%</b>	<b>16.56%</b>	<b>19.16%</b>	<b>17.16%</b>
Other Income	27	16	18	44
Depreciation	63	61	69	80
Finance Cost	49	52	61	38
<b>Profit before Exceptional Items and Tax</b>	<b>112</b>	<b>177</b>	<b>276</b>	<b>334</b>
Exceptional Items (Net)	-	98	(23)	(3)
<b>PBT</b>	<b>112</b>	<b>275</b>	<b>253</b>	<b>331</b>
Tax	46	33	33	63
Non – Controlling Interest	-	-	(3)	-
<b>PAT before Exceptional Item</b>	<b>66</b>	<b>144</b>	<b>246</b>	<b>271</b>
<b>PAT Margin before Exceptional Item (%)</b>	<b>4.54%</b>	<b>8.70%</b>	<b>12.15%</b>	<b>11.40%</b>
<b>PAT after Exceptional Item</b>	<b>66</b>	<b>242</b>	<b>223</b>	<b>268</b>
<b>PAT Margin after Exceptional Item (%)</b>	<b>4.54%</b>	<b>14.62%</b>	<b>11.01%</b>	<b>11.27%</b>
Other Comprehensive Income	(3)	2	5	(4)
<b>Total Comprehensive Income</b>	<b>63</b>	<b>244</b>	<b>228</b>	<b>264</b>
EPS (INR)(not annualised)	6.44	23.56	21.77	22.56

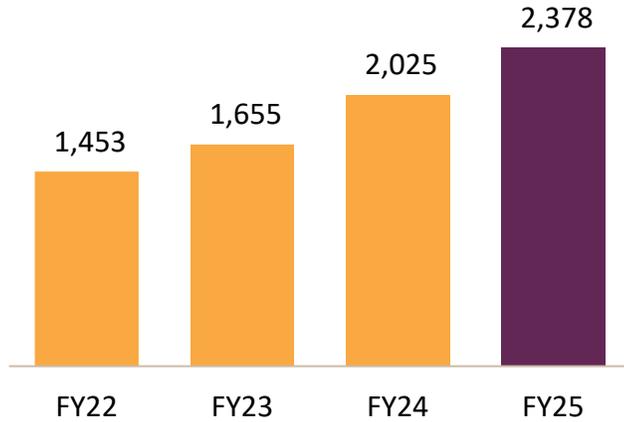
# HISTORICAL CONSOLIDATED BALANCE SHEET

Particulars (INR Mn)	FY22	FY23	FY24	FY25
<b>EQUITY AND LIABILITIES</b>				
<b>Equity</b>				
Equity Share Capital	25	25	101	127
Other Equity	568	811	947	2440
Non Controlling Interest	-	-	(3)	(4)
<b>Total Equity</b>	<b>593</b>	<b>837</b>	<b>1,045</b>	<b>2,563</b>
<b>LIABILITIES</b>				
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	-	-	
<b>Total Liabilities</b>	<b>863</b>	<b>867</b>	<b>842</b>	<b>634</b>
<b>Total Equity And Liabilities</b>	<b>1,456</b>	<b>1,704</b>	<b>1,887</b>	<b>3,197</b>

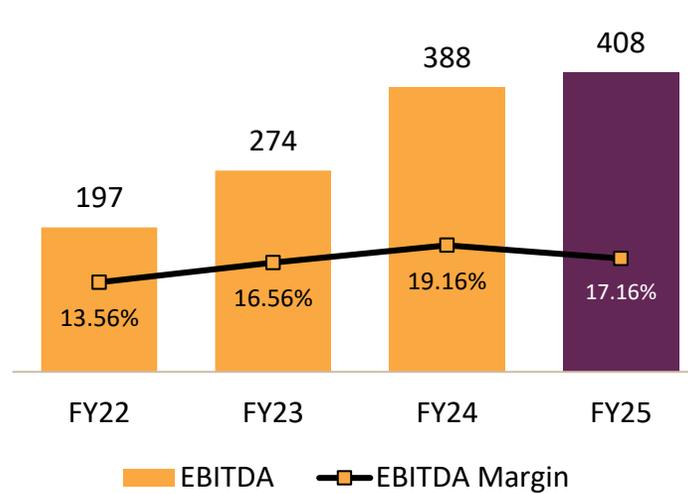
Particulars (INR Mn)	FY22	FY23	FY24	FY25
<b>ASSETS</b>				
<b>Non-Current Assets</b>				
Property, Plant and Equipment	384	382	413	607
Right of use assets	11	50	45	41
Capital Work-in-Progress	1	13	32	66
Investment Property	-	-	-	
Goodwill	-	-	-	
Other Intangible Assets	168	177	186	189
Intangible assets 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
<b>Current Assets</b>				
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
<b>TOTAL ASSETS</b>	<b>1,456</b>	<b>1,704</b>	<b>1,887</b>	<b>3,197</b>

# FINANCIAL PERFORMANCE

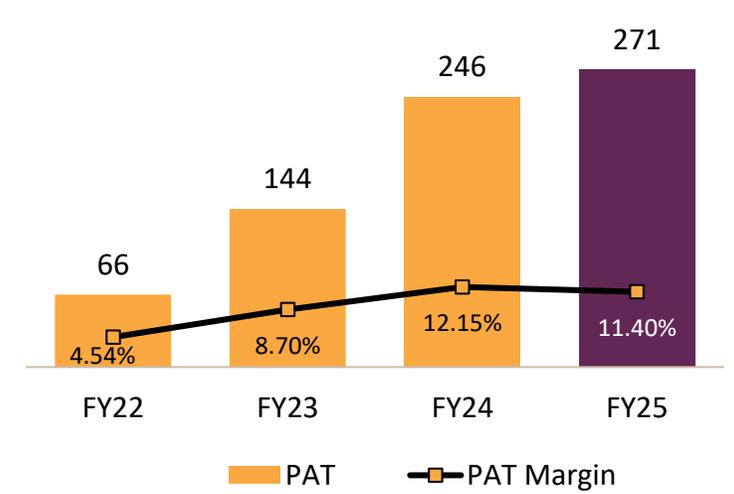
Revenue from Operations (INR Mn)



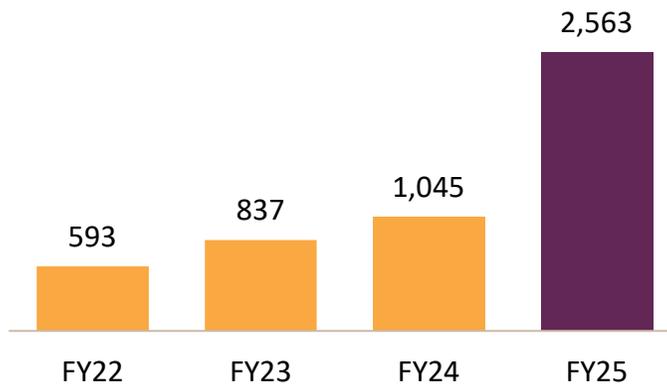
EBITDA (INR Mn) & EBITDA Margins %



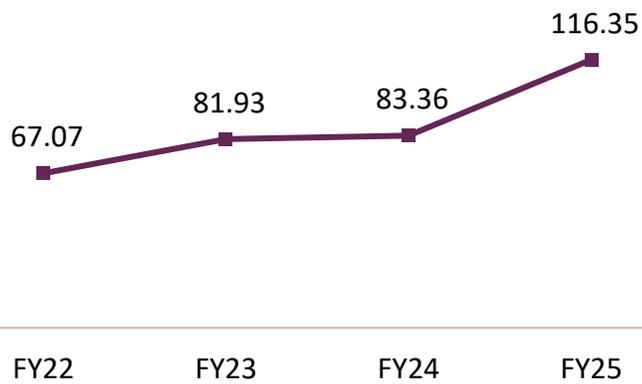
PAT (INR Mn) & PAT Margins % \*



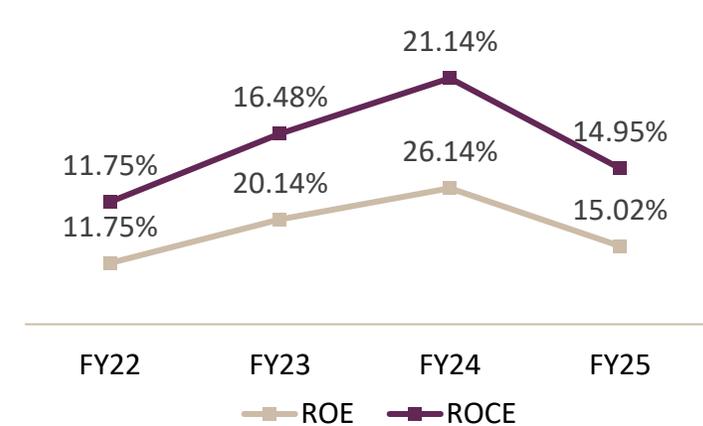
Net Worth (INR Mn)



Working Capital Days



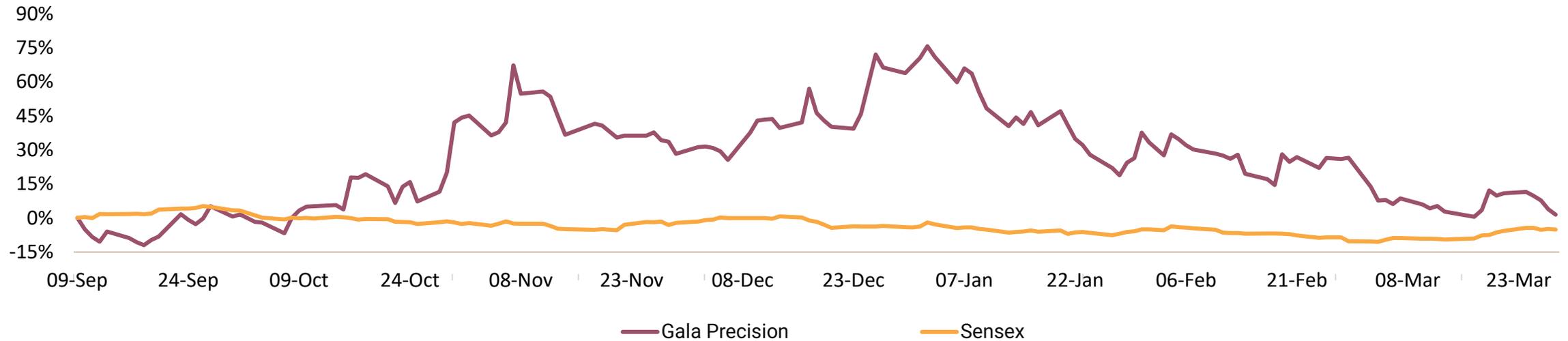
ROE\* & ROCE %



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

# CAPITAL MARKET SLIDE

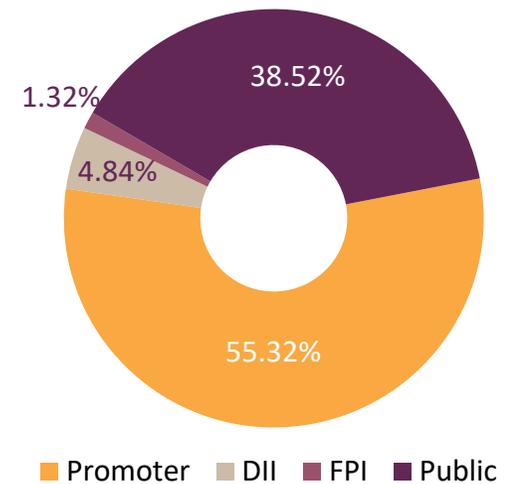
### 7 Month Stock Performance (up to 31<sup>st</sup> March, 2025)



### Market Data (As on 31<sup>st</sup> March, 2025)

Particulars	INR
Face Value	10.00
CMP	798.60
52 Week H/L	1,480.80 / 685.60
Market Capitalization (Mn)	10,140.46
Shares O/S (Mn)	12.70

### Shareholding Pattern (As on 31<sup>st</sup> March, 2025)



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