Tube Investments of India Limited

Engineered.

Empowered.

Future-Forward.

Investor Presentation
Q4 2025-26



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Group Overview

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Murugappa Group – Our Legacy

AGRICULTURE

- Parrys
- Coromandel FUTURE POSITIVE

ENGINEERING

- CUMI Carborundum Universal Ltd.,
- Tube Investments of India Limited
- CG Power and Industrial Solutions Ltd.

FINANCIAL SERVICES

- Chola Financial Holdings
- Chola MS General Insurance
- Chola MS Risk Services
- Chola Enter a better life

OTHER BUSINESSES

- Parry Enterprises
- Parry Agro Industries Ltd.,
- Ambadi Enterprises Limited
- MWTS

ELECTRIC VEHICLES

- TI Clean Mobility Private Limited
- TIVOLT Electric Vehicles Private Limited
- Jayem Automotives Private Limited
- IPLTech Electric Private Limited

A NATIONAL FORCE, GLOBALLY MINDED

125+ Years of excellence

$10.21B Revenue

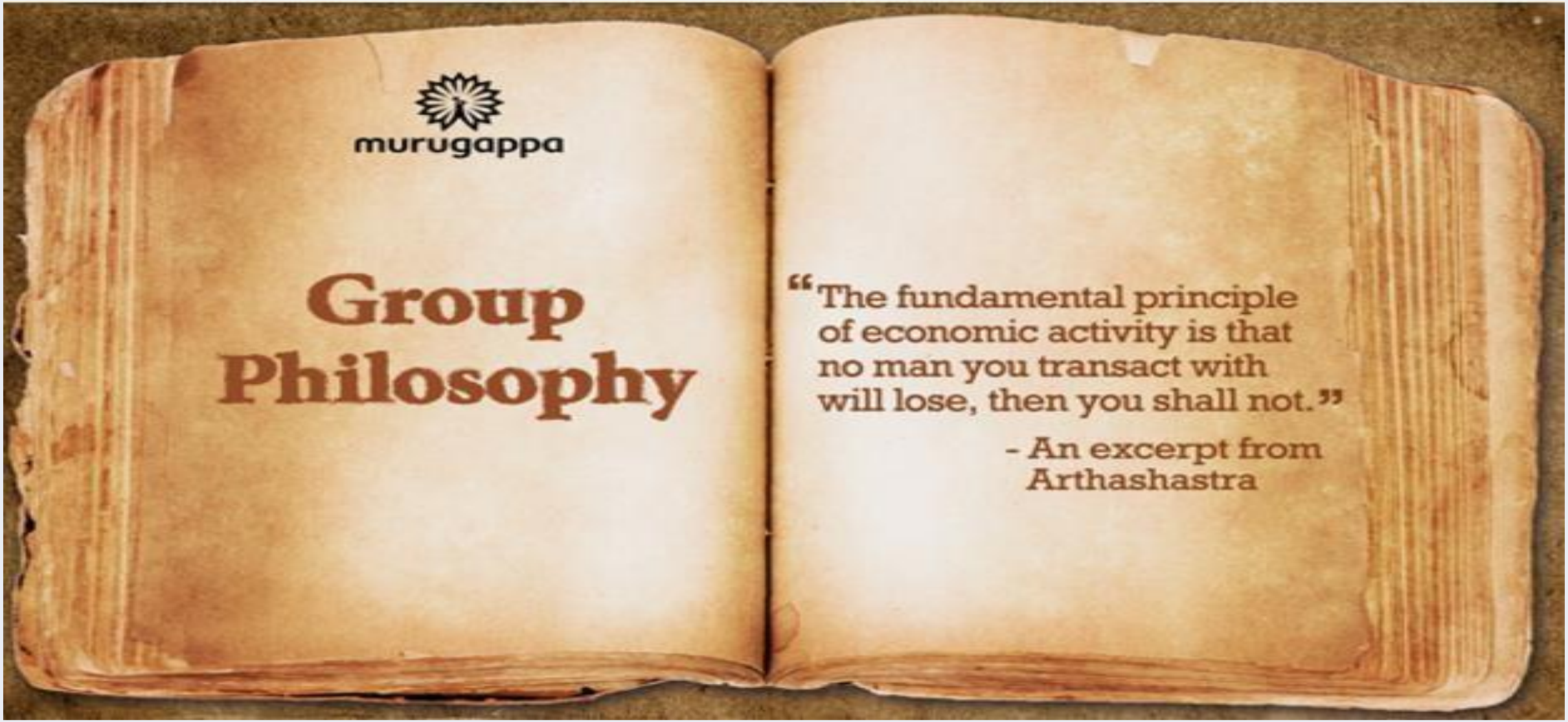
1 ETHOS

1 GROUP

50+ Countries market reach

94,000+ Employees

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About TII

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Tube Investments of India Limited (TII)

INDIA'S PREMIER ENGINEERING COMPANY

TUBE PRODUCTS OF INDIA


Precision Tubes


Cold Roll Steel Strips


Tubular Components

METAL FORMED PRODUCTS DIVISION


Drives & Transmission


Precision Parts


Roll Form Sections


Large Mechanical Sections

MOBILITY DIVISION


Cycles

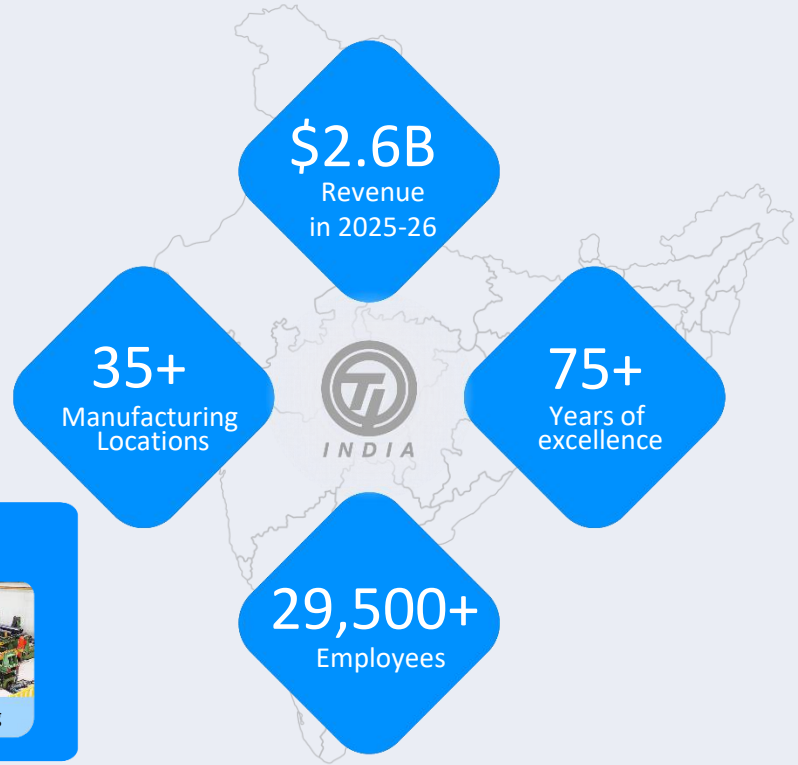

Fitness

OTHER BUSINESSES


Industrial Chains


TI Optoelectronic Solutions


TI Machine Building



SUBSIDIARIES


TI Clean Mobility Pvt Ltd.


CG Power and Industrial Solutions Ltd.


Shanthi Gears Limited


Sedis


TI Medical Pvt Ltd.

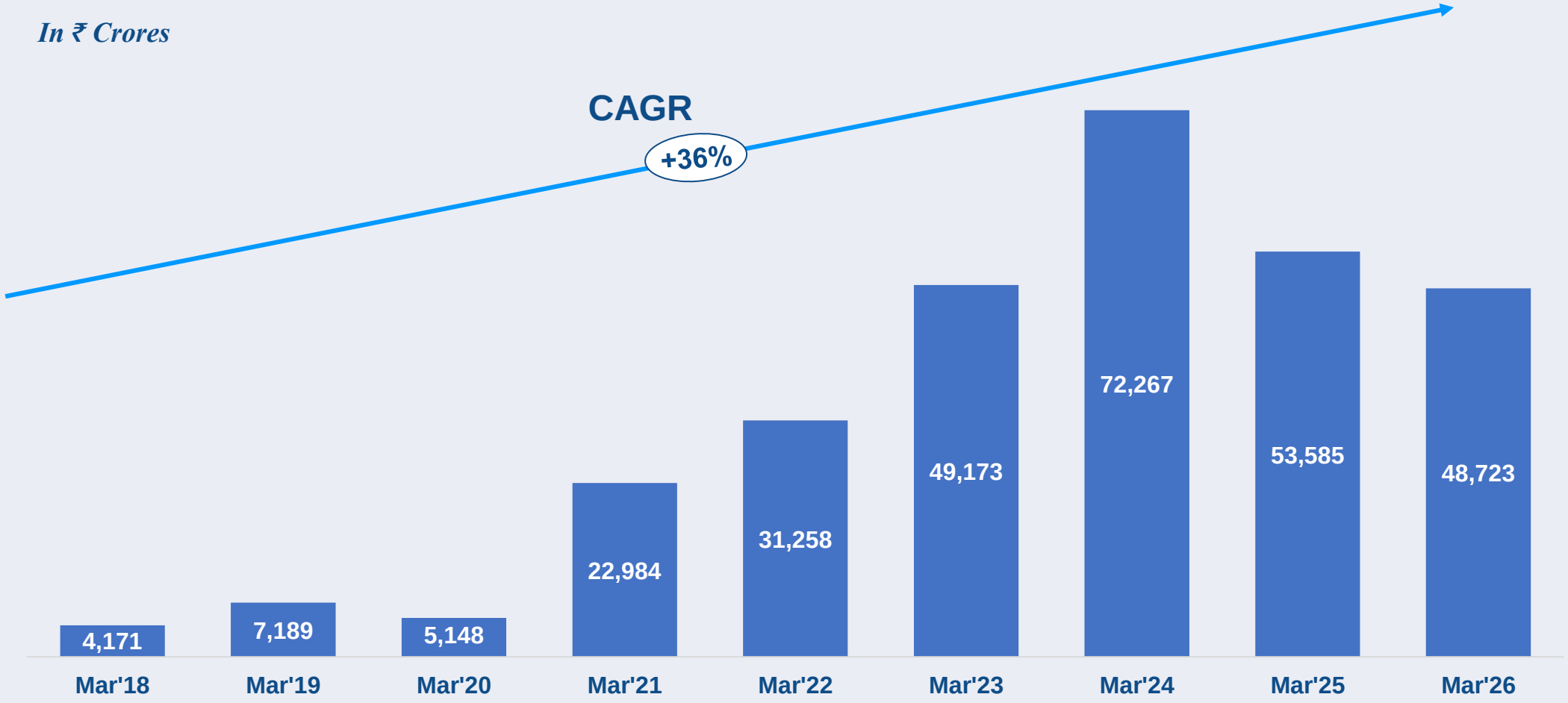

3xper Innoventure Ltd.


Kcaltech System India Pvt. Ltd.

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Market Capitalization

In ₹ Crores

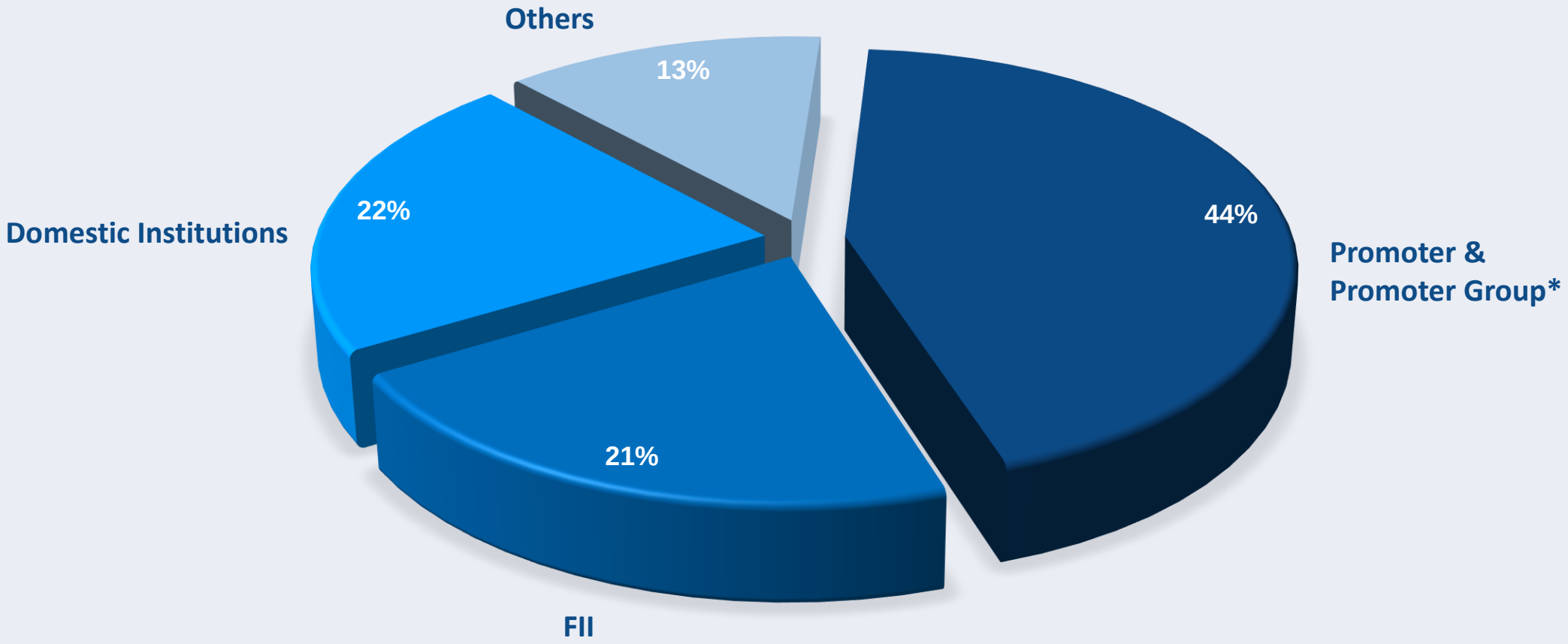


Period	Mar'18	Mar'19	Mar'20	Mar'21	Mar'22	Mar'23	Mar'24	Mar'25	Mar'26
Share Price as at period end	₹222	₹383	₹274	₹1,192	₹1,620	₹2,547	₹3,737	₹2,769	₹2,517

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Shareholding Pattern

As Of 31st March 2026



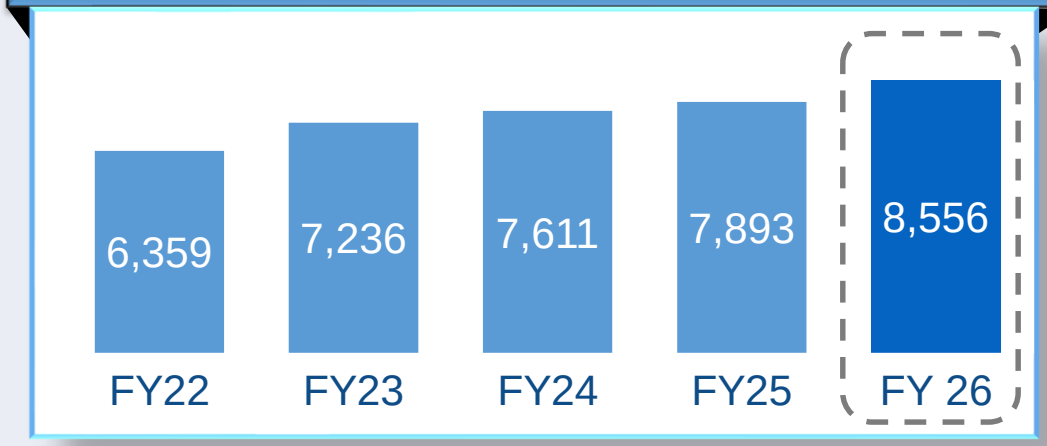
**Promoter Shareholding of 44% includes Ambadi Investment Limited 36% and Others 8%*

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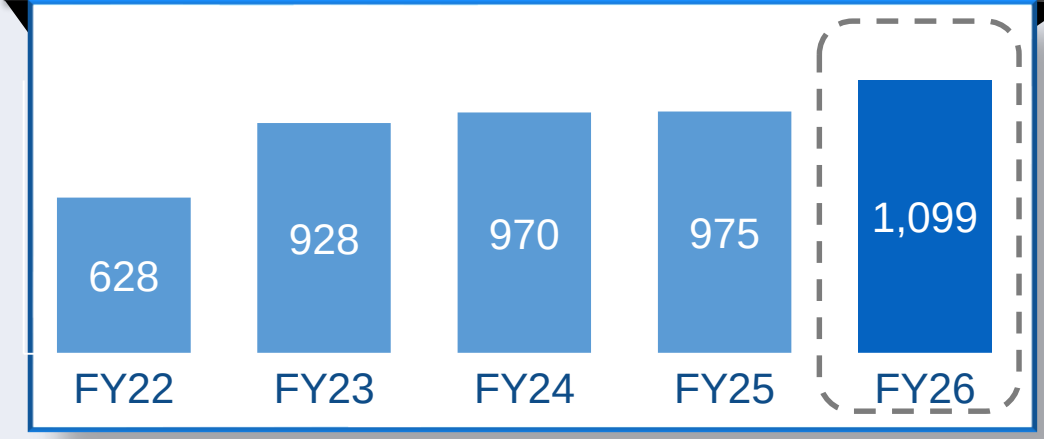
TII Yearly Performance Trends

₹ Crores

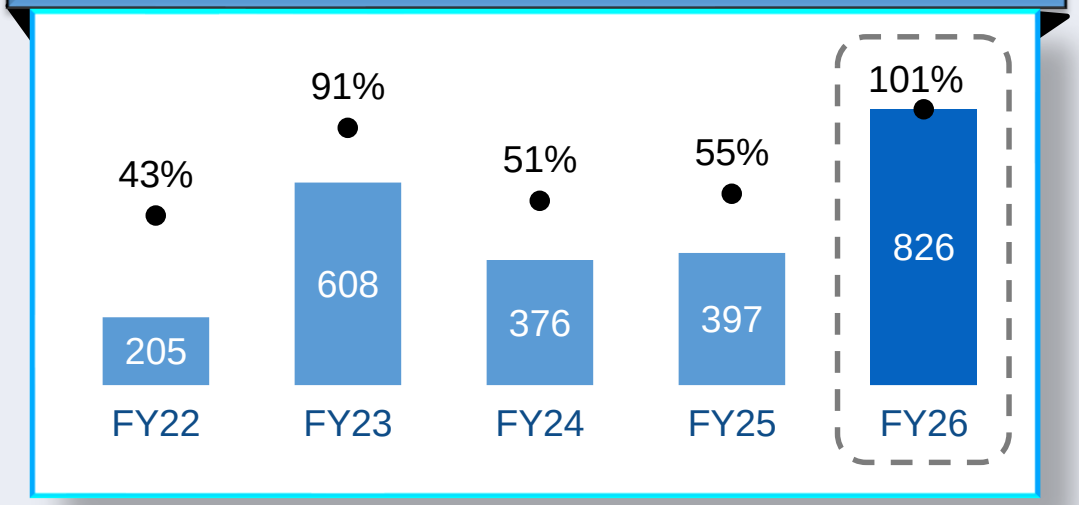
Revenue from operations (net of intersegment)



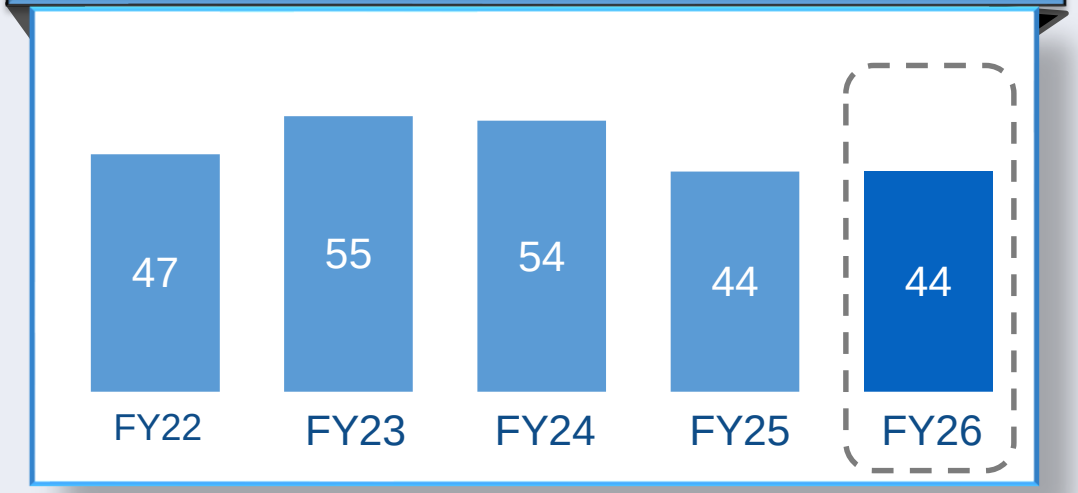
Profit Before Tax (before exceptional items & FV Gain)



FCF & FCF/PAT% (before FV Gain)



ROIC% (pre-tax) (before exceptional items & FV Gain)

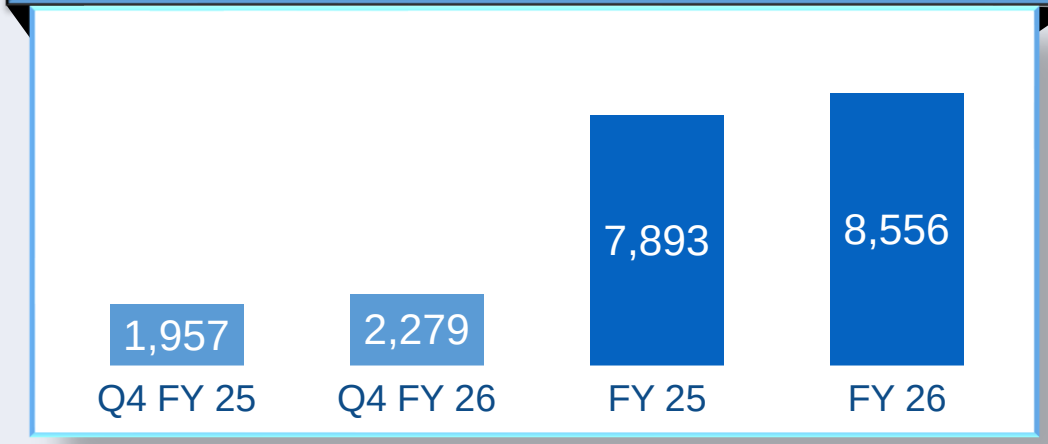


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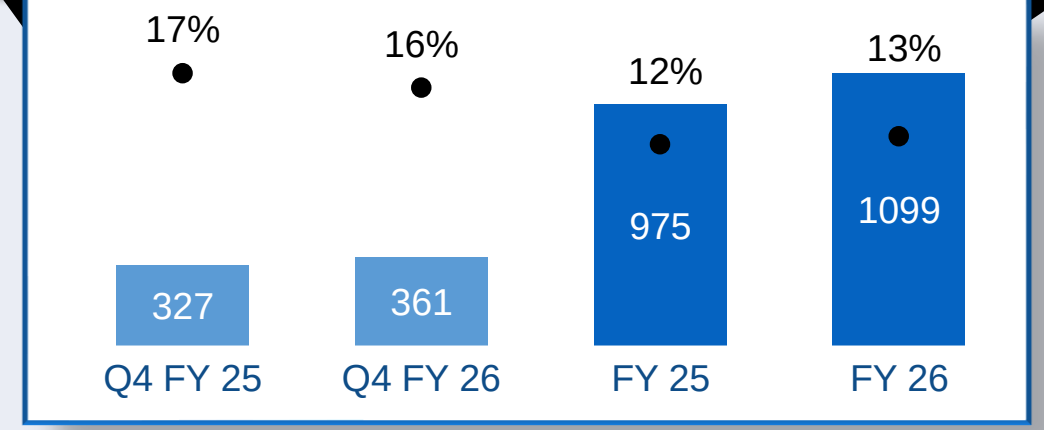
TII Standalone Performance

₹ Crores

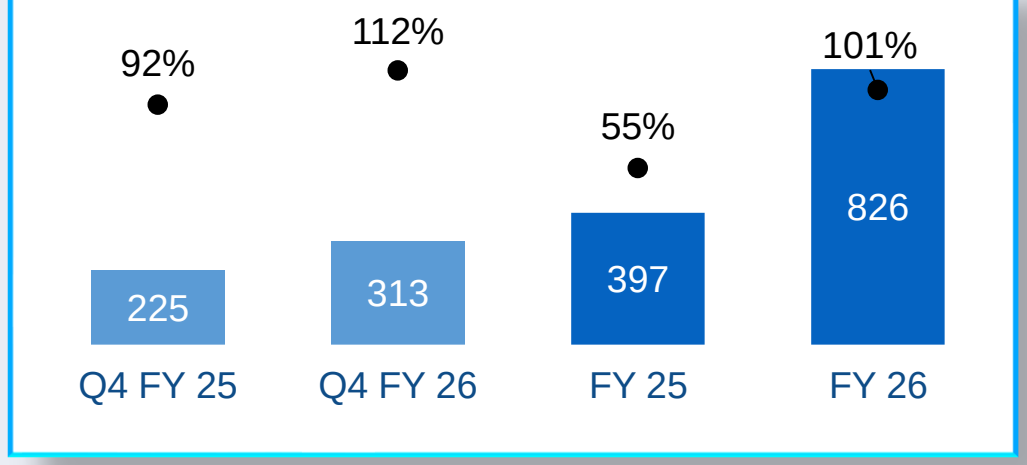
Revenue



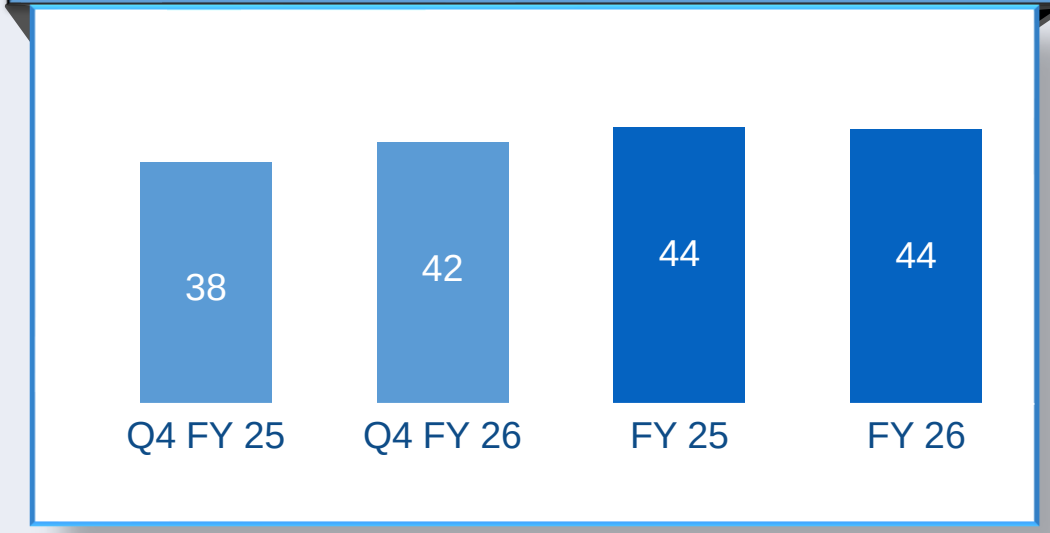
PBT & PBT%(before exceptional items & FV Gain)



FCF & FCF/PAT% (before FV Gain)



ROIC% (pre-tax) (before exceptional items & FV Gain)



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INDIA

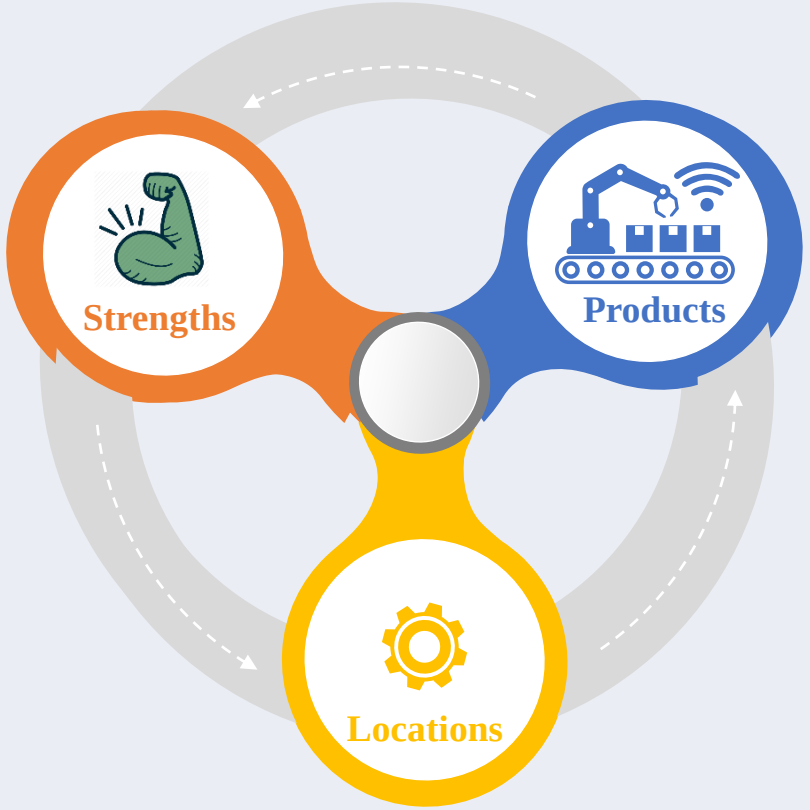


ENGINEERING DIVISION

INDIA'S LARGEST PRECISION TUBE MANUFACTURER – SHAPING PRECISION, DRIVING GROWTH

Key Strengths

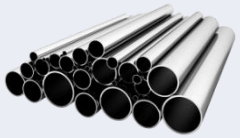
- Market leader and preferred Indian supplier in CDW Tubes.
- Major manufacturer with the engineering expertise to offer customized, application specific CRSS and tubular products.
- State-of-the-art manufacturing facilities proximately located to customers in key geographies.
- Ultrasonic testing, thermo profile scanners and automation to ensure product excellence
- Exploring new business opportunities in Drilling, Mining and Stab Bar Products.



Manufacturing Locations

Tamil Nadu - Avadi and Tiruttani
Maharashtra – Shirwal, Phaltan and Nashik
Punjab - Mohali and Rajpura

Products



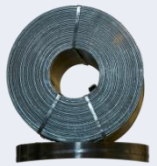
Electric Resistant Welded Tubes



Cold Drawn Welded Tubes



Tubular Components



Cold Rolled Steel Strips



Large Diameter Tubes

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Awards



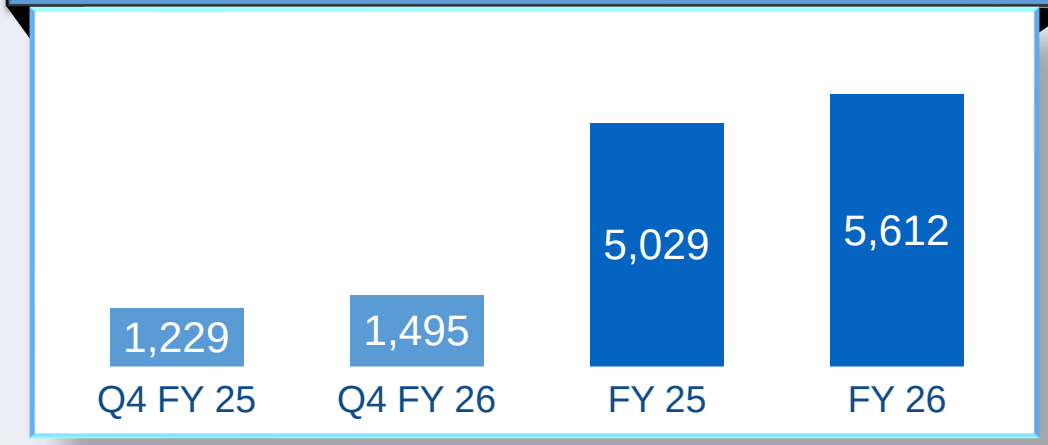
Received an award from Endurance Technologies at the 20th Supplier Meet under the category "Significant Support for Ramp-Up through Capacity Enhancement."

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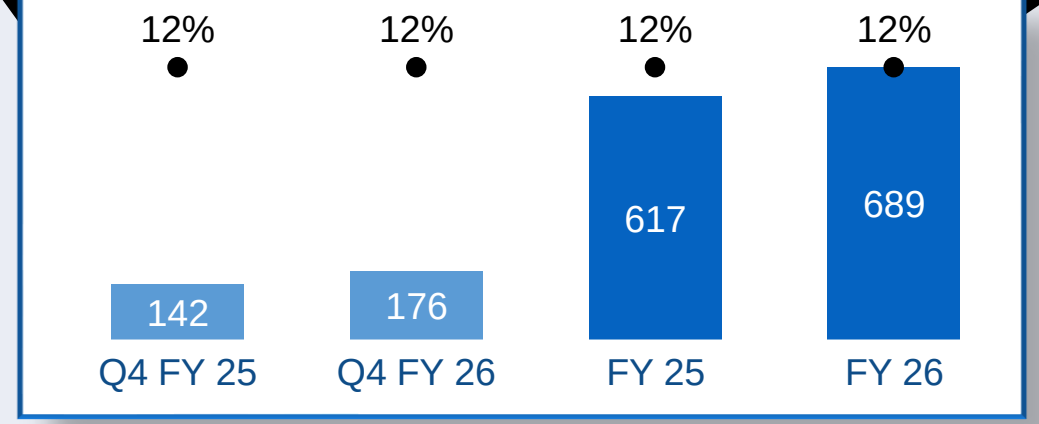
Engineering Division Performance

₹ Crores

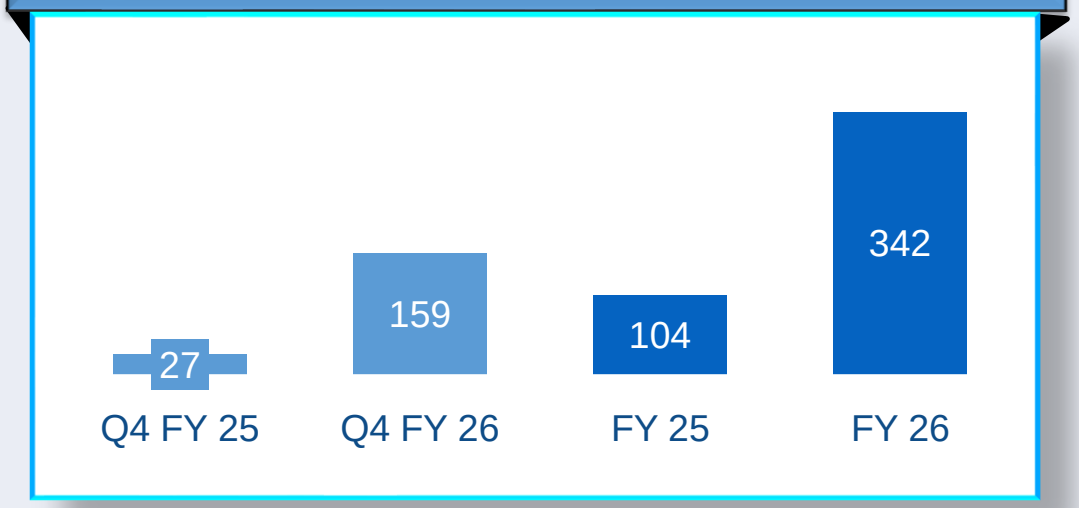
Revenue



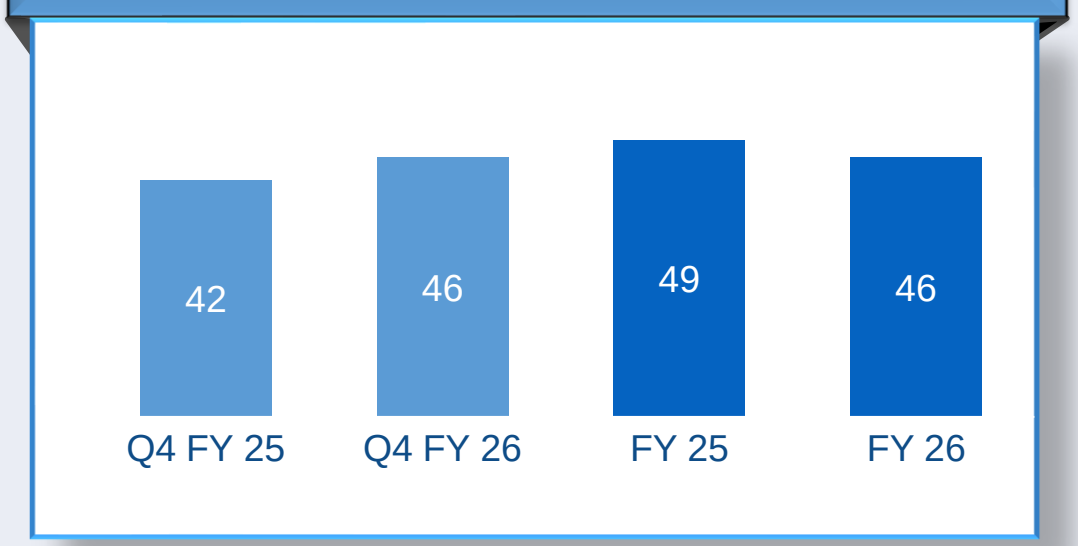
PBIT & PBIT%



FCF



ROCE%



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INDIA



METAL FORMED PRODUCTS DIVISION

INDIA'S MARKET LEADER FOR AUTOMATIC CHAINS

Key Strengths

- Market leader in automotive drive and cam chains.
- Preferred supplier for roll formed car doorframes in India.
- Capability to offer just-in-time service and last mile connectivity to customers.
- World class high speed presses and process capabilities for manufacturing high quality, fine blanked products of very close tolerance.
- Global manufacturer of repute for safety critical components for the Automotive industry.
- Robotic automation and high precision fabrication capabilities for the Railway sector.



Manufacturing Locations

Tamil Nadu - Ambattur, Kakkalur, Tiruninravur, Hosur
Haryana – Bawal
Uttrakhand - Laksar
Gujarat – Sanand
Andhra – Medak
Maharashtra – Aurangabad, Pune

Products



Auto Kits (Rombo & Diamond Brand)



Auto Chains



Doorframes



Fine Blanking

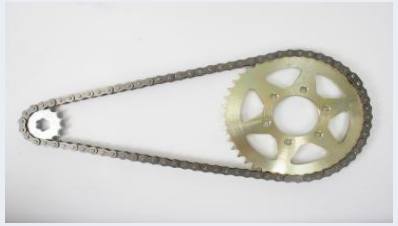


Railway Coach Parts

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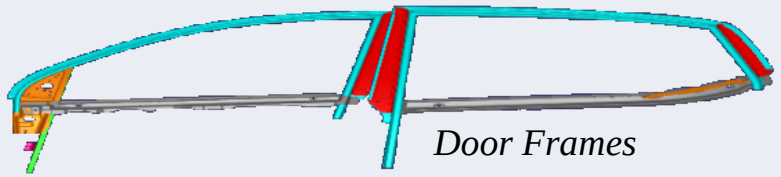
Cam Chains



After Market Brands







Door Frames



Divisional Channels



Side Impact Beams



Cowl Cross Beam

Railways







Fine Blanked Products

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Customer visit & Recognition



Participated in the Tech Show organized by ACMA for Skoda Auto Volkswagen



Loram USA rail maintenance team visited Railway Business



Visit by KINET (Mr. David John) & RVNL (Mr. Manish Agarwal)



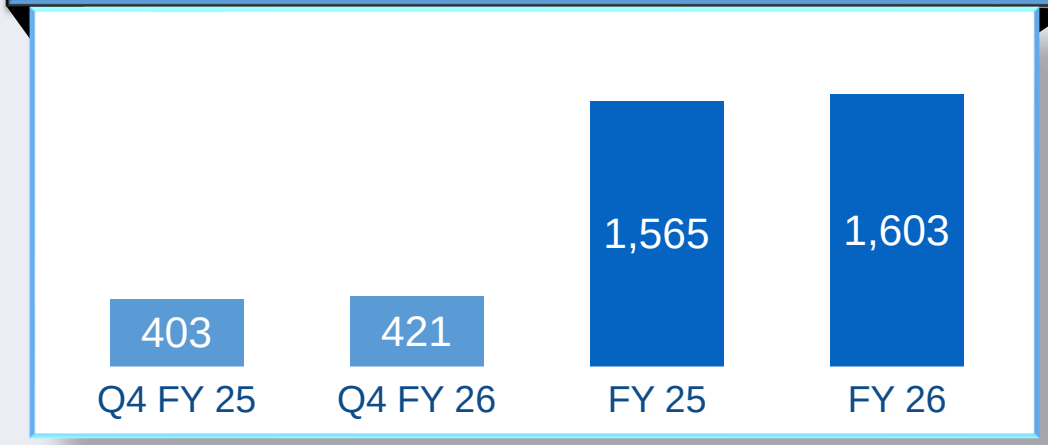
First DTC Car body integration completed at RVNLS Latur Facility

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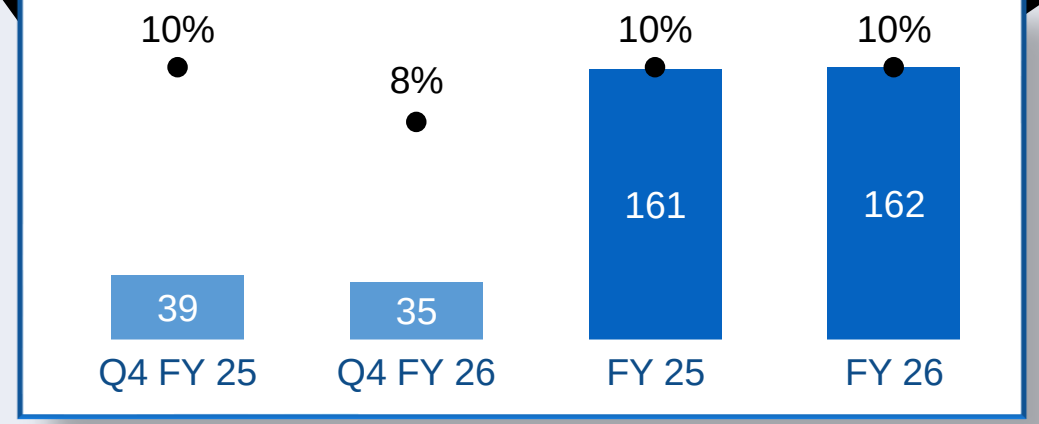
Metal Formed Products Division Performance

₹ Crores

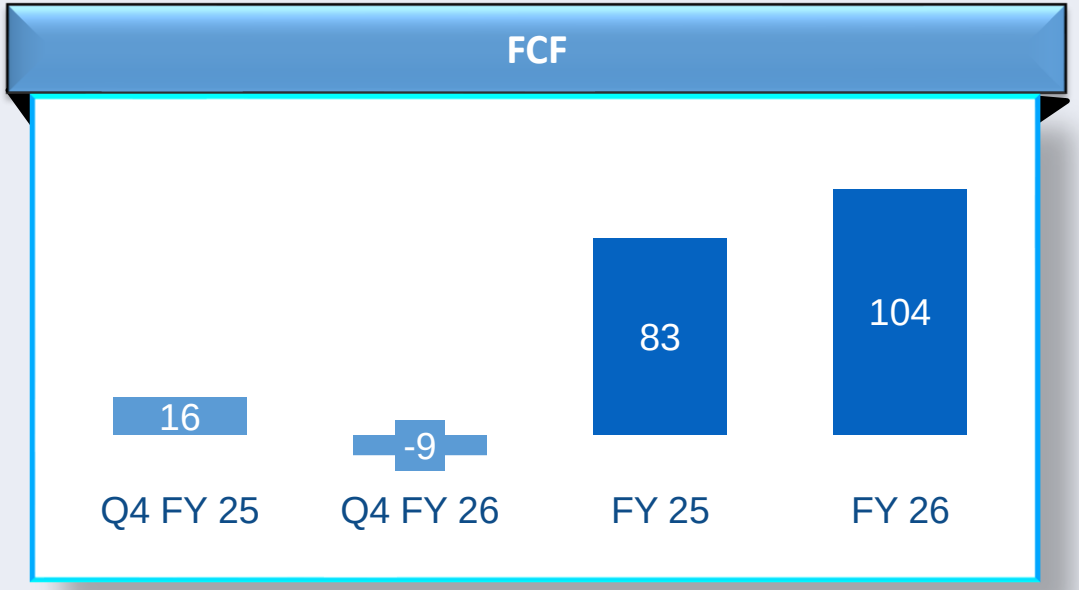
Revenue



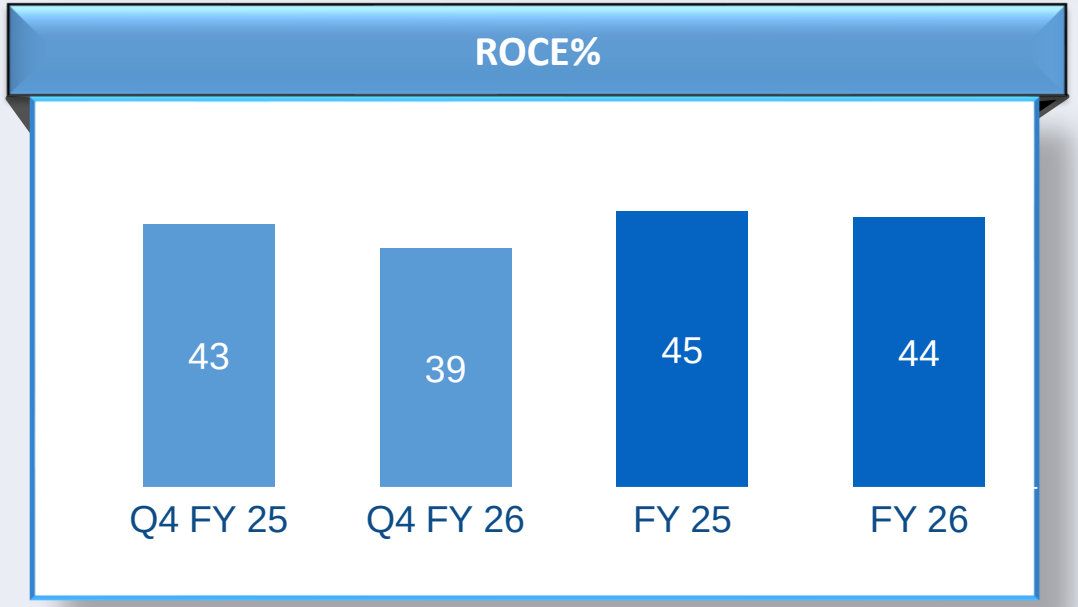
PBIT & PBIT%



FCF



ROCE%



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INDIA



MOBILITY DIVISION

INDIA'S TRUSTED CYCLING PARTNER – INSPIRING MOBILITY, FITNESS & LIFESTYLE

Diverse Portfolio: Manufacturers and marketers of bicycles and cycling accessories

Leading retail transformation through Track and Trail, with a focus on premium cycles and accessories

Nationwide Distribution: Extensive reach through 10,000+ dealers

MANUFACTURING FACILITIES

Chennai

Rajpura

CYCLES

- Kids Cycles
- MTB Cycles
- SLR Ladies cycles
- Standards cycles
- Premium cycles
- Electric cycles

MAINTENANCE

- High-end Parts
- Tools
- Cleaner
- Service Station

TODDLERS

- Tricycle
- Push Scooter
- Swing Car
- Balance Bike

SPARES

- Domestic Bicycle Parts

ACCESSORIES

- Rider Accessories
- Bike Accessories

RECREATIONAL

- Sports Products

BRAND PORTFOLIO

BSA · HERCULES · MACH CITY · ROADEO · montra · TRACK&TRAIL







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REDEFINING FITNESS WITH PERFORMANCE AND PRECISION

COMMERCIAL CARDIO

Treadmill - 18+

Bikes - 15+

Elliptical - 6+

Others - 5+

COMMERCIAL STRENGTH

Pin-Loaded - 170+

Plate Loaded - 50+

Functional Series - 25+

Benches - 40+

DOMESTIC

Treadmill – 54+

Bikes - 56+

Elliptical - 14+

Benches - 4+

Multi Gym - 4+

ACCESSORIES

Dumbbell - 50+

Plates - 30+

Rods - 25+

Yoga Mats - 5+

Gym Ball - 15+

Others - 30+



650+ Total Product Range

470+ Fitness Dealer Network

HERCULES FITNESS LIVE YOUNG

4L+ Happy Customers

10+ Commercial Series

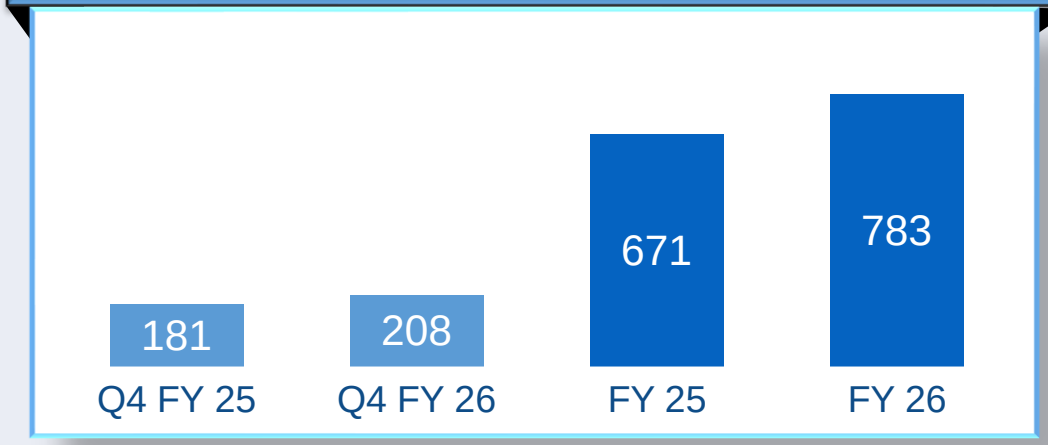
- Unmatched After-sales Support
- Extensive Service Network
- Pan-India Presence
- State-of-the-art In-house Manufacturing
- 1000+ Gym Setups All India
- Unmatched Range Of Products

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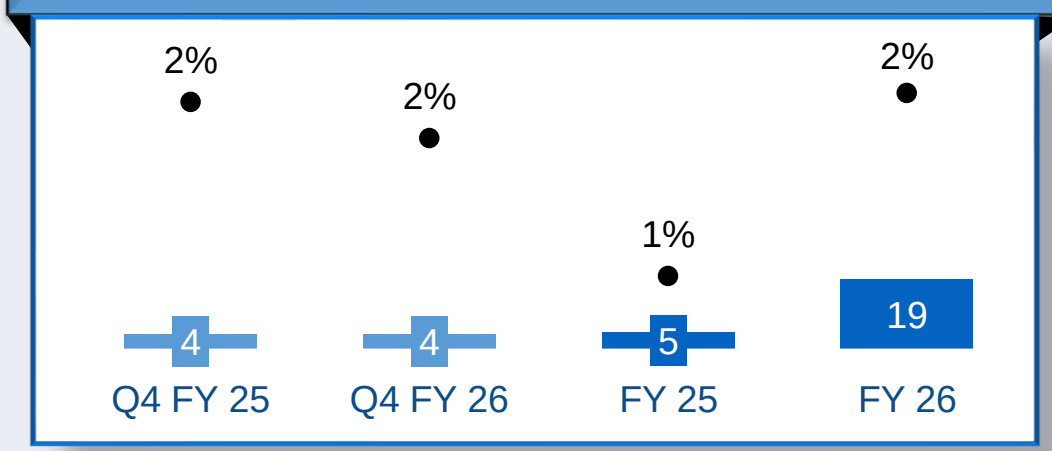
Mobility Division Performance

₹ Crores

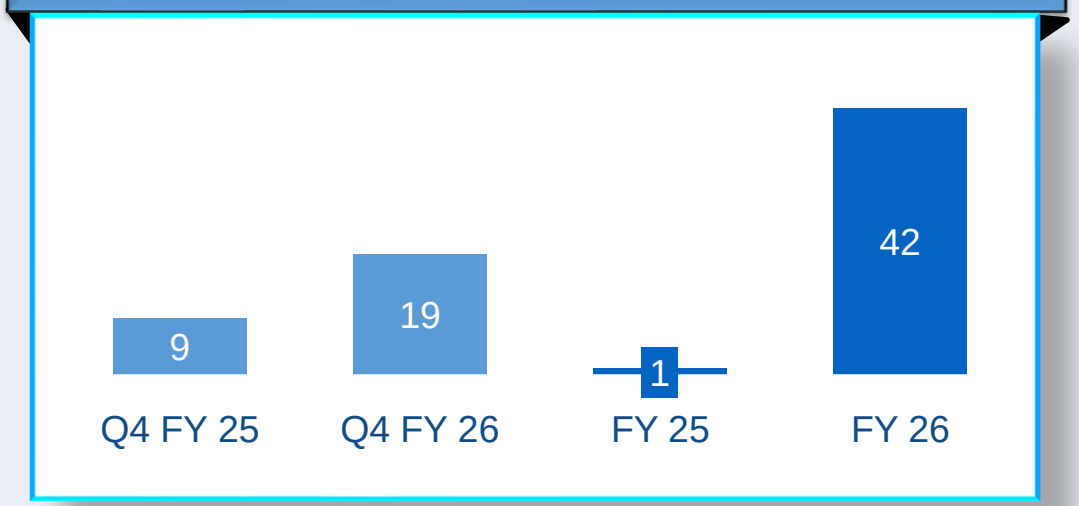
Revenue



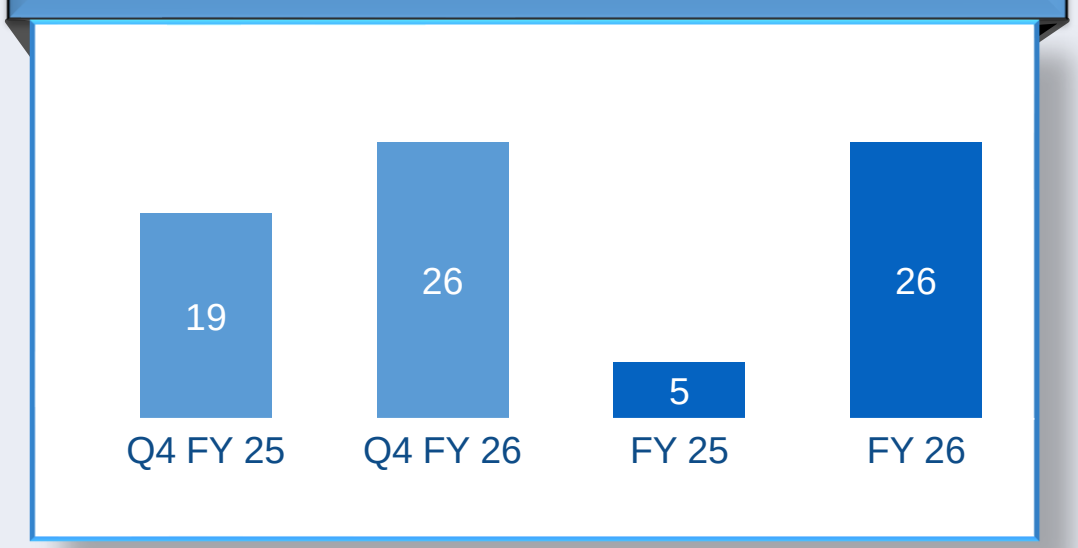
PBIT & PBIT%



FCF



ROCE%



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INDIA



OTHER BUSINESSES

POWERING INDUSTRIES WORLDWIDE - DELIVERING RELIABILITY

Global Standards Compliance:
Manufactured as per ANSI, British Standards and specifications

Strong Manufacturing Base:
5 facilities in Chennai powering diverse industries

Sector Coverage:
Agriculture, automotive, cement, steel, sugar, fertilizer, textile & food.

Global Brand - Rombo:
Presence in 40+ countries with a warehouse in the USA.

Engineering Excellence:
50%+ exports in special-purpose applications.



Power transmission and Conveying Chains



Engineering Class Chains

PRODUCT RANGE

- Standard Roller Chains
- Agricultural Chains
- Leaf Chains
- Engineering Class Chains
- Sprockets

SPECIALTY PRODUCTS

- Oil Field Chains
- Pin Oven Chains
- Attachment Chains
- Corrosion Resistant Chains
- Stainless Steel Chains - Food Grade
- Sintered Bush Chains - Self Lubricating



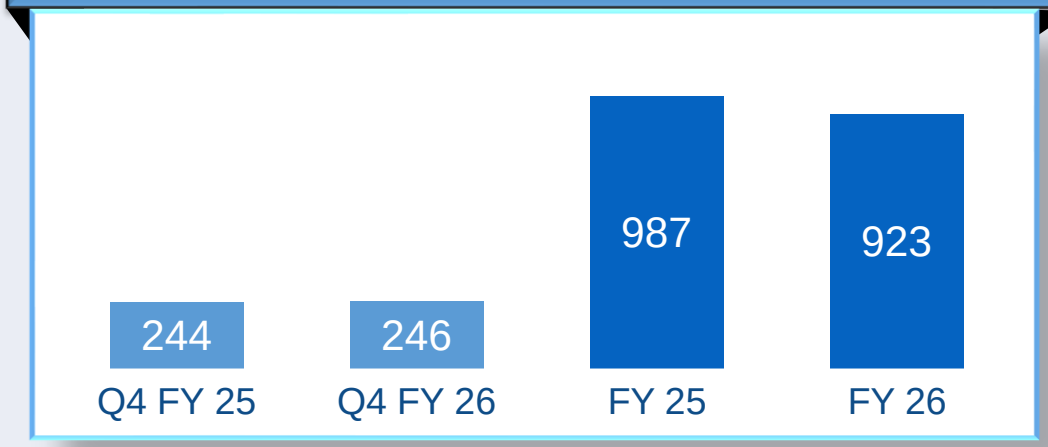
Agri Chains

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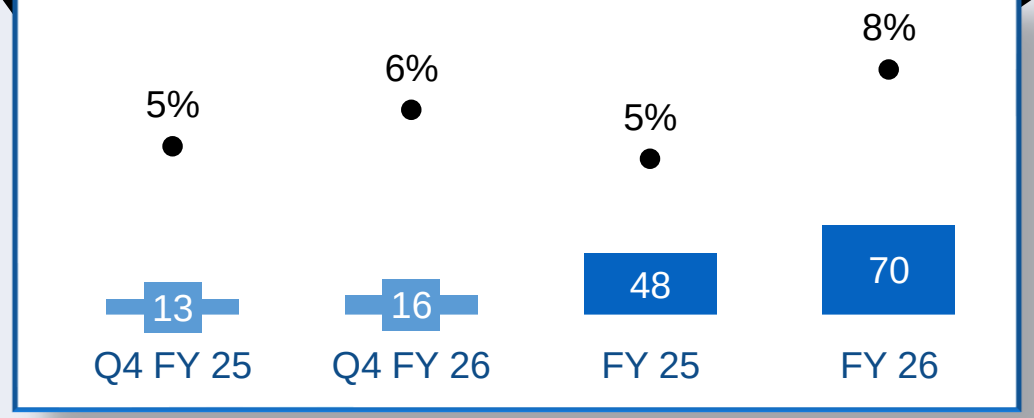
Other Divisions Performance

₹ Crores

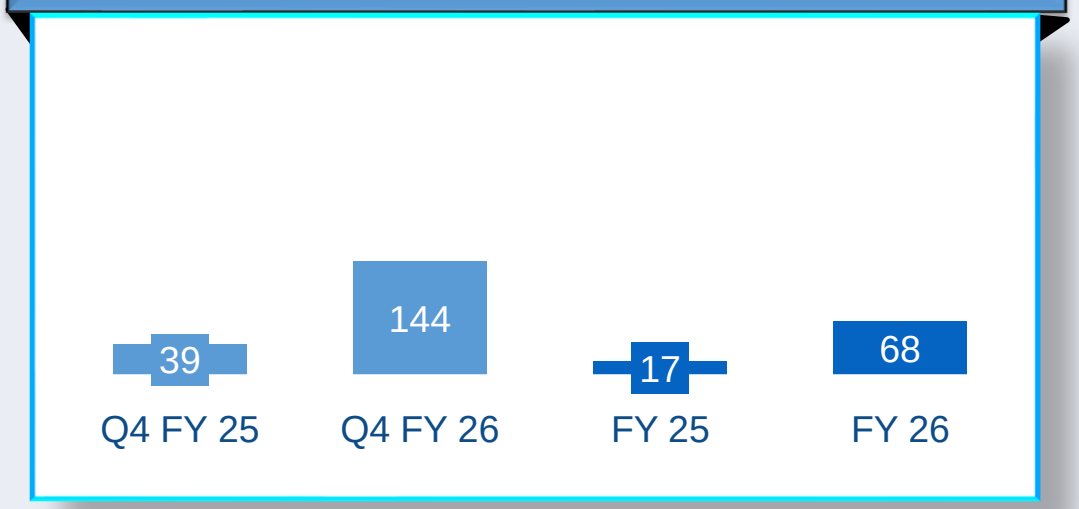
Revenue



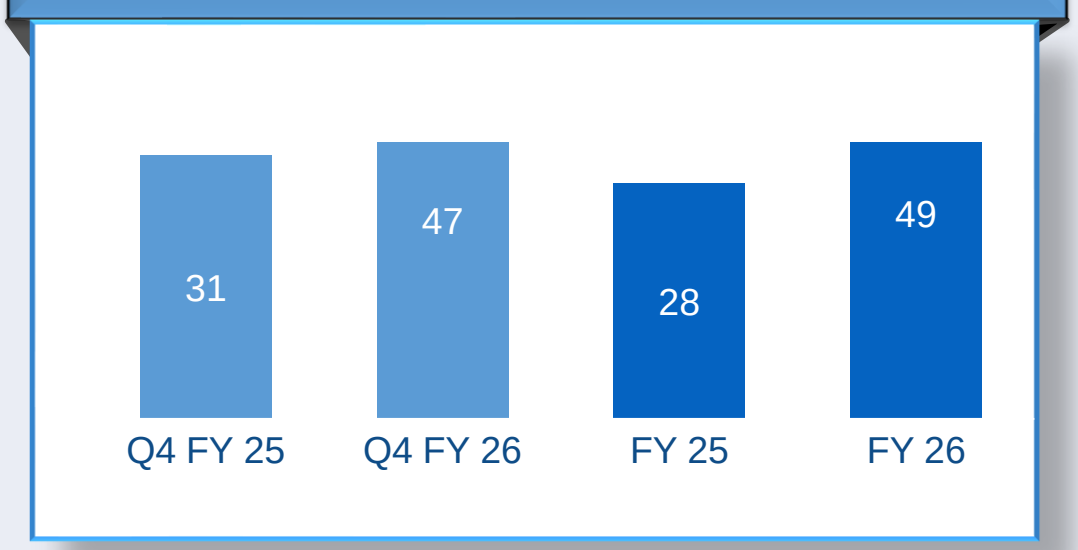
PBIT & PBIT%



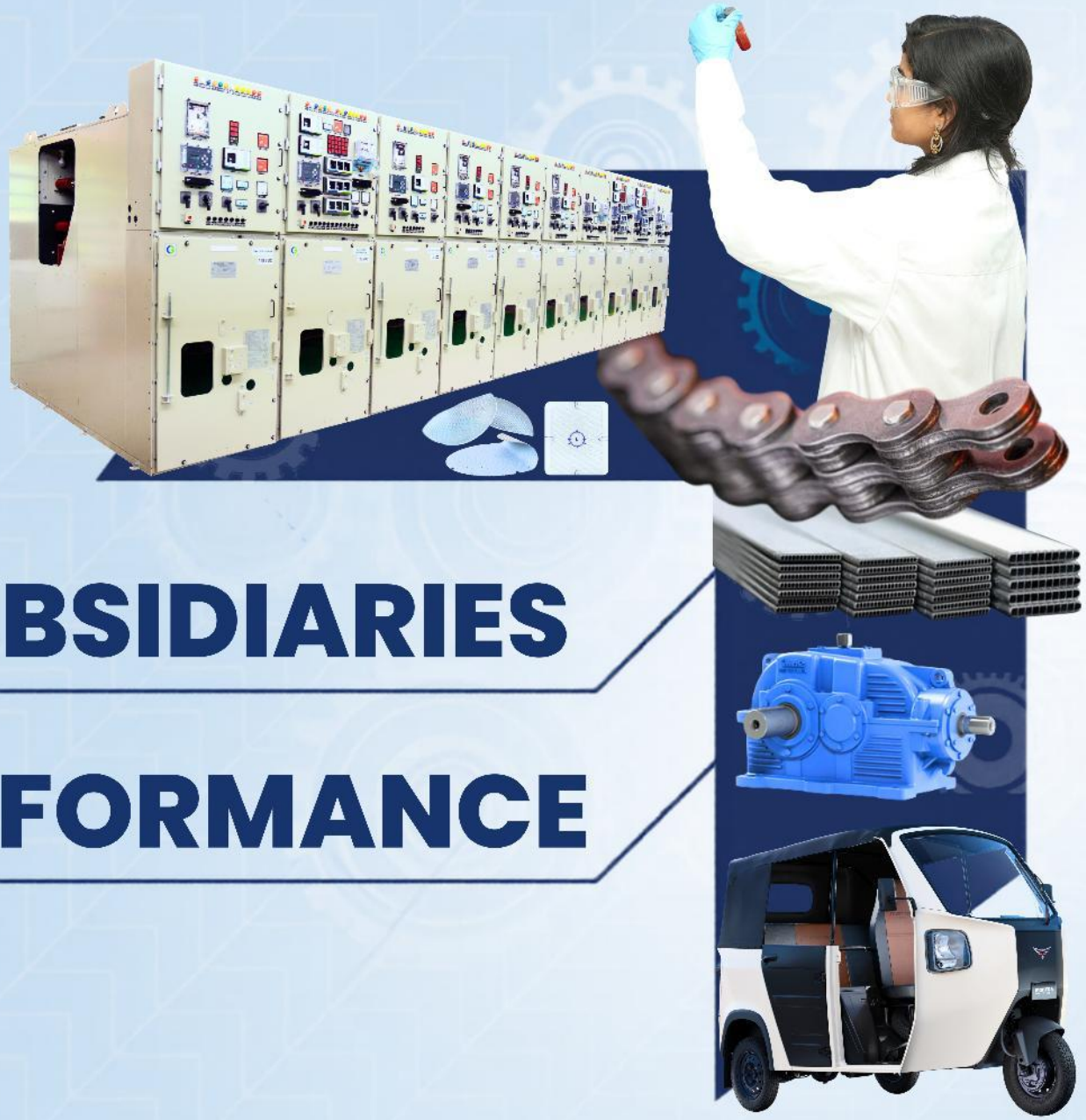
FCF



ROCE%



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TII SUBSIDIARIES PERFORMANCE

TI Clean Mobility Private Limited (TICMPL)

Product Segment

- Electric 3W Auto
- Electric Tractors
- Electric M & HCV (through its Subsidiary IPLTech Electric Pvt Ltd – "IPLT")
- Electric SCV (through its Subsidiary TIVOLT Electric Vehicles Pvt Ltd – "TIVOLT")

Funding

- TII has so far invested ₹250 Cr. into TICMPL as Equity and ₹750 Cr. as Compulsorily Convertible Preference Shares (CCPS)
- During the year ended 31st March 2026, TICMPL invested ₹245 Cr in TIVOLT, increasing its stake to 100%
- During the year ended 31st March 2026, TICMPL invested ₹5.97 Cr via rights issue in Jayem Automotives Private Limited and shareholding remains at 50%.
- During the year ended 31st March 2026, TICMPL invested ₹280 Cr in IPLT, increasing its stake to 95.58%

MONTRA ELECTRIC

MONTRA ELECTRIC TIVOLT

IPLTECH ELECTRIC

JAYEM AUTOMOTIVES



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INDIA'S 1ST ELECTRIC TRACTOR

TICMPL, Tractor segment, is India's First Manufacturer of Electric Tractors.

Our goal is to revolutionize e-Mobility in India by producing innovative automobiles that address sustainability and efficiency.

Our E-tractors are cost effective, pollution free, maintenance and noise free.



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IPLT is a manufacturer of electric heavy commercial vehicles, which launched India's first electric truck - **RHINO 5536.**

It also launched new **RHINO 5538,** India's first heavy-duty electric truck with battery swapping technology

As of 31st March 2026, TI Clean Mobility Pvt Ltd (TICMPL) holds 95.58% stake in IPLT.



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TICMPL, a subsidiary of the TII, entered into an agreement for pursuing electric small commercial vehicle business ("e-SCV') through a subsidiary to be incorporated by TICMPL, and subsequently in FY 2023-24, TICMPL incorporated a subsidiary company, viz., **TIVOLT ELECTRIC VEHICLES PRIVATE LIMITED** to carry out the said business.

During January 2025, launched **e-SCV "EVIATOR"** in the Auto Expo.

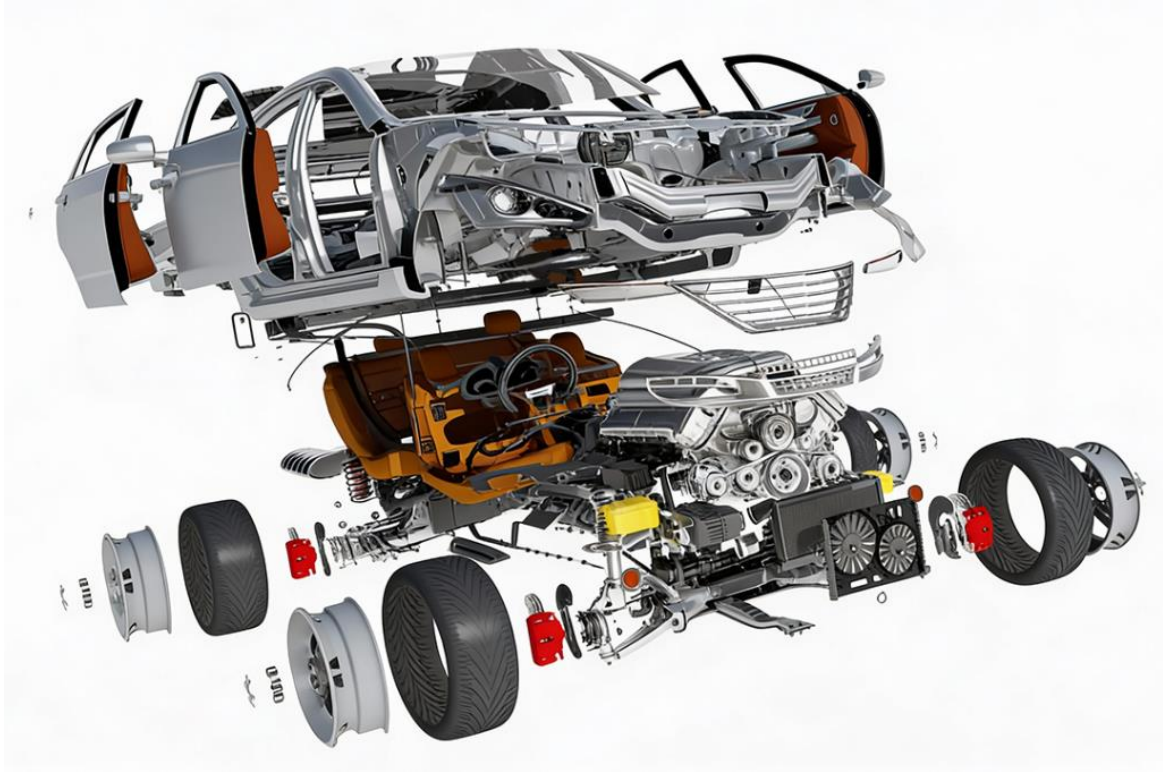
During the quarter ended 31st March 2026, TICMPL increased its stake in TIVOLT from **94.12% to 100%.**



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Jayem Automotives Private Limited (JAYEM), held by TICMPL, is an **automotive research & development company** engaged in design, development, testing and manufacturing of a wide range of automotive components, systems and prototypes.

During the year ended 31st March 2026, **Jayem raised ₹11.95 Cr.** through rights issue and shareholding % remains the same.



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- Over 8 decades of presence in India
- One of top 10 World’s Transformer Manufacturer
- #1 motors manufacturer in India
- One of the largest manufacturers of Transformers & Switchgears in India
- Entered Semiconductor space by the acquisition of **Renseas Electronics’ Radio Frequency Components (RFC) business** through its subsidiary **Axiro Semiconductor Private Limited.**
- CG secured **INR 900 Cr ($99.2 million) power transformers export order from Tallgrass Integrated Logistics Solutions LLC USA,** for a large-scale data center project in the United States. This order was received on January 16, 2026 and it’s the largest ever single order for CG.



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Key Business Verticals

POWER

Sub-segments



Transformers and Reactors



Switchgear



EPD

Key Clientele

INDUSTRIALS

Sub-segments



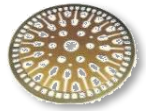
Railways



Motors



Drives & Automation



Stampings

Key Clientele

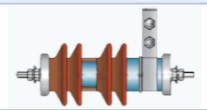
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Industrials: Consistently among the top players

	Products		Peers	Customers
Motors	LT Motors		ABB, Siemens	OEMs of Pumps, Compressors, Gear Box and Construction Equipment and industries such as power, transmission, oil and gas, cement, metals & mining and in railways transportation
	Large Motors		Bhel, ABB	
	FHP Motors		Marathon, Lawkim	
Railways	AC Traction Motor TM 6068		Bhel, Saini	• Integral Coach Factory (ICF) • Chittaranjan Locomotive Works (CLW) • Diesel Locomotive Works (DLW) and • Diesel-Loco Modernization Works (DMW)
	Propulsion Electrics		Bhel	
	IGBT Propulsion System		BTIL, Bhel, ABB	
	Loco Transformer		ABB, Bhel	
	Relay		AEW	
	Point Machine		VossIoh	
	Carriage Fan (BLDC)		Kanwar	

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Power: Consistently among the top players

	Products		Peers	Customers
Switchgears	EHV Instrument Transformers		GE, ABB, BHEL	• Power Grid Corporation of India Limited (PGCIL) • Nuclear Power Corporation of India Limited (NPCIL) • NTPC • State-level transmission and distribution utilities
	Surge Arresters		OBLUM, Lamco	
	Gas Circuit Breakers		GE, Siemens	
	MV Switchgear		ABB, Schneider	
	HV GIS		Siemens, ABB	
	S6 (Vacuum Interrupters)		BEL, ABB	
Transformers	Power Transformers		GE, TBEA	• PGCIL • NTPC • NHPC Limited • Larsen & Toubro (L&T) • GE • Torrent
	Distribution Transformers		Voltamp, Tesla	

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- CG Semi Private Limited (CG Semi), a subsidiary of CG Power and Industrial Solutions Limited (CGPISL), is a Joint Venture between CGPISL, Renesas Electronics Corporation and Stars Microelectronics (Thailand) Public Co. Ltd.
- CG Semi provides Outsourced Semiconductor Assembly and Testing (OSAT) services, offering comprehensive test services at global scale, covering advanced and legacy packages.
- The company serves diverse applications across industries such as Automotive, Defence, Infrastructure and IOT.
- On 28th August 2025, CG Semi has announced the launch of its first end-to-end OSAT facility in Sanand, Gujarat.
- G1 facility is on track to commence commercial production in calendar year 2026, G2 facility is under construction.





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CG Power – Standalone Financials

₹ Crores

Particulars	Q4 24-25 Actual	Q4 25-26 Actual	CY QTD vs PY QTD (%)	YTD 24-25 Actual	YTD 25-26 Actual	FY 25-26 vs FY 24-25 (%)
Revenue from Operations	2,563	3,129	22%	9,329	11,331	22%
PBIT	384	549	43%	1,348	1,800	34%
Interest	3	3	4%	6	7	21%
PBT (before exceptional)	381	547	43%	1,342	1,793	34%
Exceptional Item	-	-		-	(36)	
PBT (after exceptional)	381	547	43%	1,342	1,757	31%
PAT	275	412	49%	974	1,317	35%

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CG Power – Consolidated Financials

₹ Crores

Particulars	Q4 24-25 Actual	Q4 25-26 Actual	CY QTD vs PY QTD (%)	FY 24-25 Actual	FY 25-26 Actual	FY 25-26 vs FY 24-25 (%)
Revenue from Operations	2,753	3,442	25%	9,909	12,418	25%
PBIT	386	494	28%	1,355	1,674	24%
Interest	3	4	37%	7	12	72%
PBT (before exceptional)	384	490	28%	1,348	1,662	23%
Exceptional Item	-	-		-	(36)	
PBT (after exceptional)	384	490	28%	1,348	1,626	21%
PAT	274	363	33%	973	1,199	23%

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ENGINEERING PRECISION, POWERING PROGRESS

Leading manufacturer of gears, gearboxes, geared motors & assemblies

50+ years of engineering and manufacturing excellence

3 advanced plants in Coimbatore with end-to-end capabilities

Comprehensive gear solutions for industries including steel, cement, power & textiles

Strong market presence in customized, application-specific products

Gearbox Specifications

DIN 3990 compliant gearbox design

Customized reduction ratios & power transmission

Robust casing in CI Gr FG 260 or stress-relieved fabricated steel

High-precision gears in alloy steel, case-hardened & ground

Bevel gear pairs lapped/profile ground for duty requirements

Application-specific shafts in carbon or alloy steel

Premium bearings (SKF/FAG/TIMKEN/NSK or equivalent)

2-hour bi-directional spin test for quality assurance

Customer-specified epoxy painting



Steel Rolling Mill Gearboxes



Conveyor Drives for Material Handling





Crane Duty – Main Hoist, Long Travel & Cross Travel



FOUNDRY PRODUCTS

S.G. Iron & Grey Iron: Machined & unmachined, 1 kg to 1.5 tons.

Phosphor Bronze

Aluminum Bronze

Leaded Bronze

Copper Alloy



Railway Gears



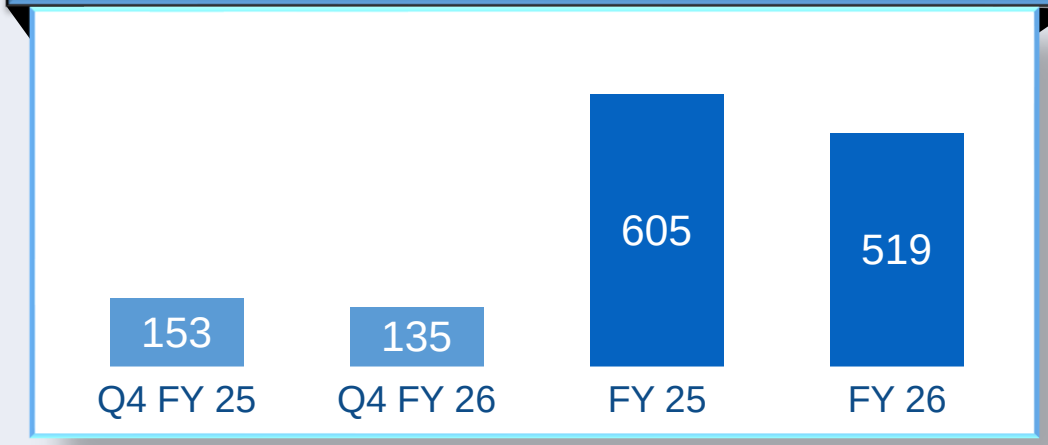
Worm Products for Elevator Application

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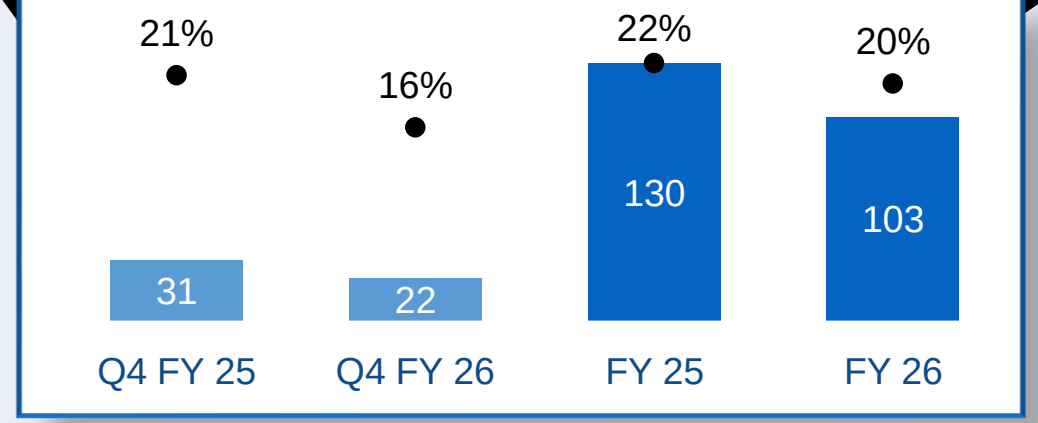
Shanthi Gears Limited Performance

₹ Crores

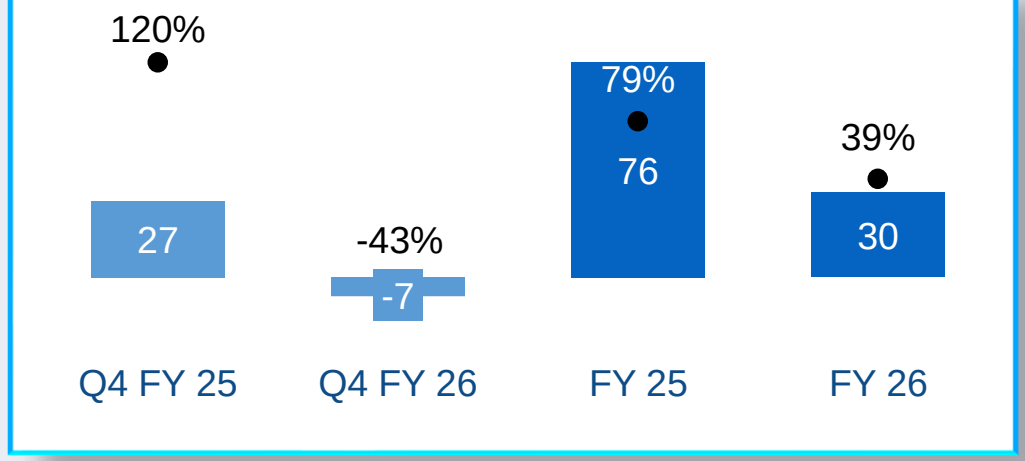
Revenue



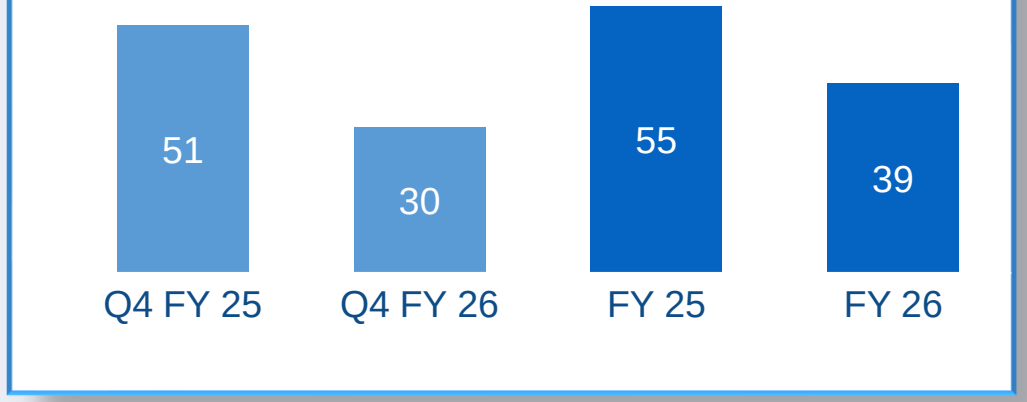
PBIT & PBIT%



FCF



ROIC%



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- Specialized in designing chains for transmission, agricultural, lifting, adapted and conveyor.

- With 500+ technical distribution points in France, Sedis currently has the Number One distribution network for French industrial chains.



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TI Medical Private Limited

TI MEDICAL
Engineering the Future of Healthcare

INDIA

Vision: To become India's premier medical devices platform, delivering advanced solutions through innovation, operational excellence, and the expertise of a highly skilled team.

Mission: Providing high-quality medical devices globally to improve patient care, driven by the mission of 'Make in India, Make for the World.'

Offices in Mumbai & Gurugram

Manufacturing Facility: Dehradun







PRODUCT PORTFOLIO

- Absorbable & Non absorbable Sutures
- Meshes & Trackers
- Cutters & Staplers
- Surgical Trocar
- Energy Devices
- Hemostats & Ligation clips
- Advanced Wound Care
- Skin Staplers





As of 31st March 2026, TII has invested ₹ 265 Crores in TI Medical Private Limited.

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3xper Innoventure Limited

Dynamic Contract Research Organization (CRO) and Contract Development and Manufacturing Organization (CDMO) in the pharmaceutical sector.

Integrated chemistry services: research to commercial manufacturing.

Cutting-edge R&D facility in Chennai's TICEL Bio Park.

Greenfield manufacturing in Naidupetta, Andhra Pradesh (advanced equipment, quality).

Partner of choice for global innovators (pharma, biotech, nutraceuticals, animal health).

Discovery Services

Synthetic Chemistry

Analytical Chemistry

Development Services

Process Development

Analytical Development

Scale up & Technology Transfer

Manufacturing Services

Custom Synthesis

Early to Mid Phase Supplies

Late Phase Supplies till Commercial Manufacturing

Intermediates & APIs



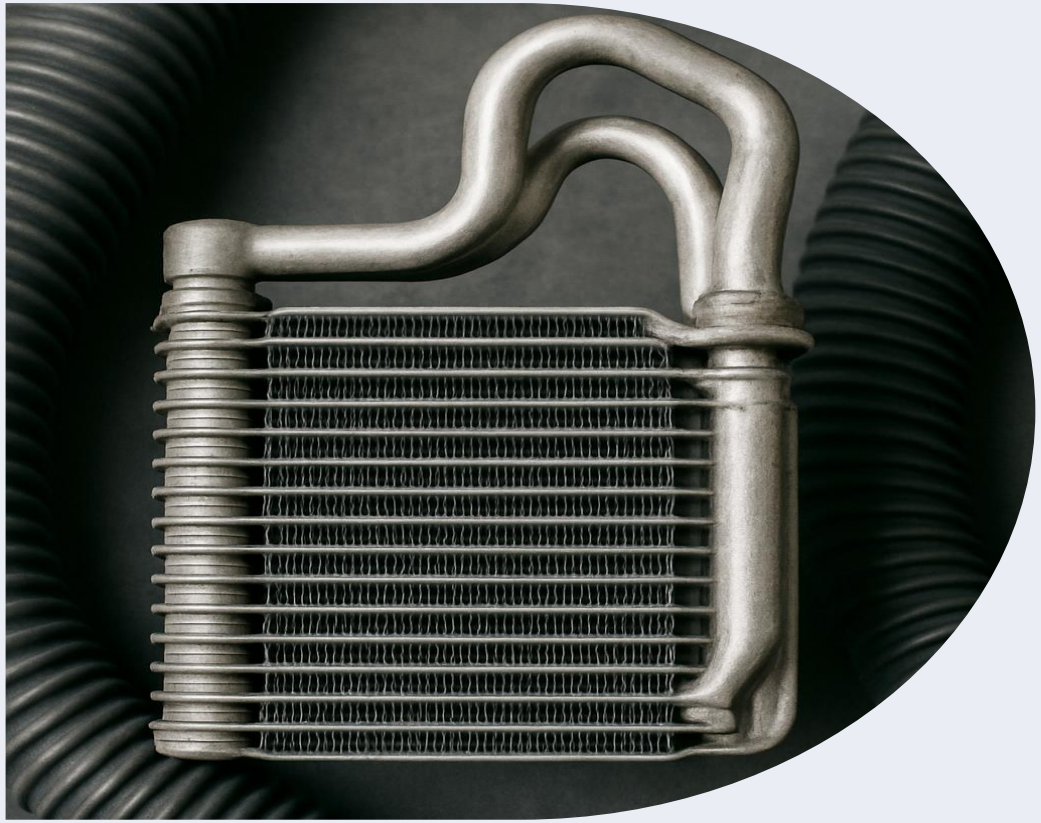




As of 31st March 2026, TII has invested ₹0.95 Cr. in Equity and ₹284.05 Cr. in CCPS and NG invested ₹0.05 Cr. in Equity and ₹14.95 Cr. in CCPS of 3xper Innoventure Limited.

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PRECISION-ENGINEERED ALUMINIUM PRODUCTS FOR ADVANCED HVAC APPLICATIONS

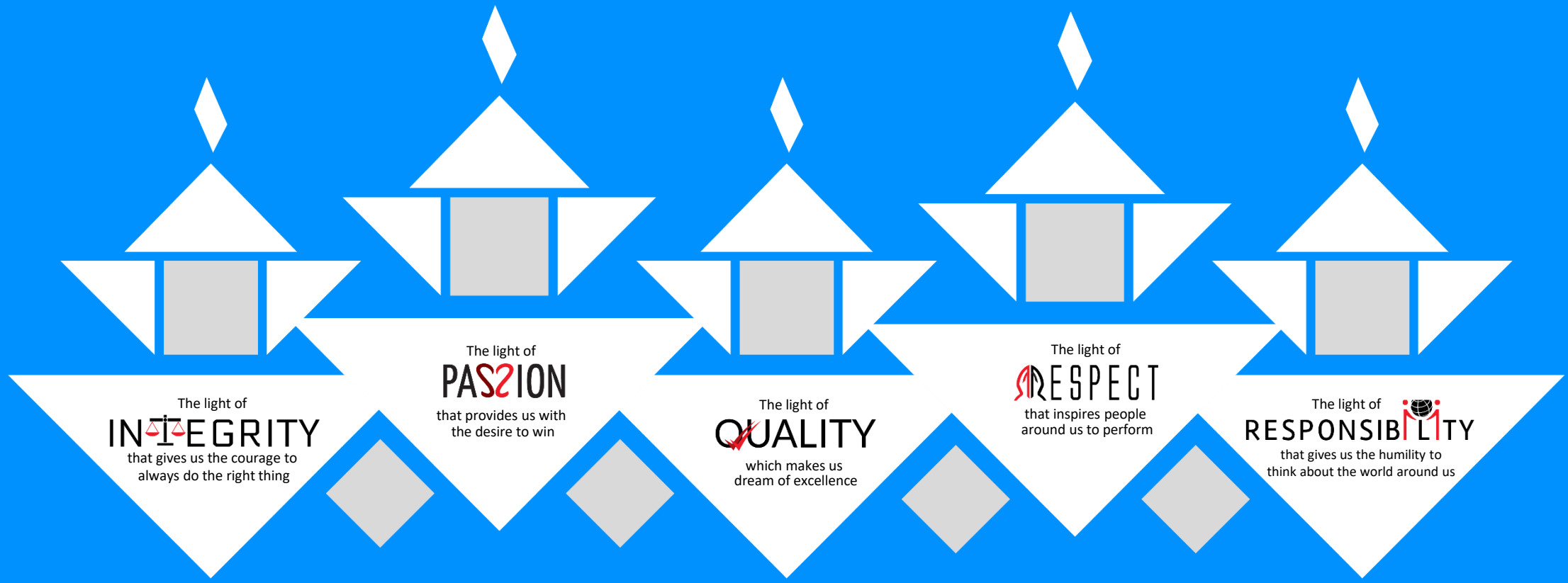


- On 31st January 2025, TII acquired 67% of the equity share capital of M/s. Kcaltech System India Private Limited) by way of subscription to 2,24,08,313 fresh equity shares for a consideration of about ₹62 Cr. Balance 33% stake is held by Kcaltech Co Limited, Korea.

- The company is engaged in the business of manufacture of Aluminum Condenser Tubes and parts as used in Heating Ventilation and Air Conditioning ("HVAC") applications in automobiles sector.

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The Five Lights



Our values and beliefs

These five lights guide us as we navigate through professional and personal decisions.

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Thank You

With a rich heritage and global presence spanning generations, TII remains committed to upholding the core principles of the Murugappa Group - the Five Lights — which have defined us for over a century. As we forge ahead, Tube Investments of India's impact and influence extend beyond products and services.

Built on a legacy of innovation and a commitment to world-class manufacturing and engineering excellence, TII continues to drive progress and prosperity while advancing a better future for generations to come.

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