Tube Investments of India Limited

Engineering the New .
Empowering the Now

Investor Presentation
Q1 2026-27



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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
- IPLTech Electric Private Limited
- Jayem Automotives Private Limited
- TIVOLT Electric Vehicles Private Limited

A NATIONAL FORCE, GLOBALLY MINDED

125+ Years of excellence

$10.21B Revenue

1 ETHOS

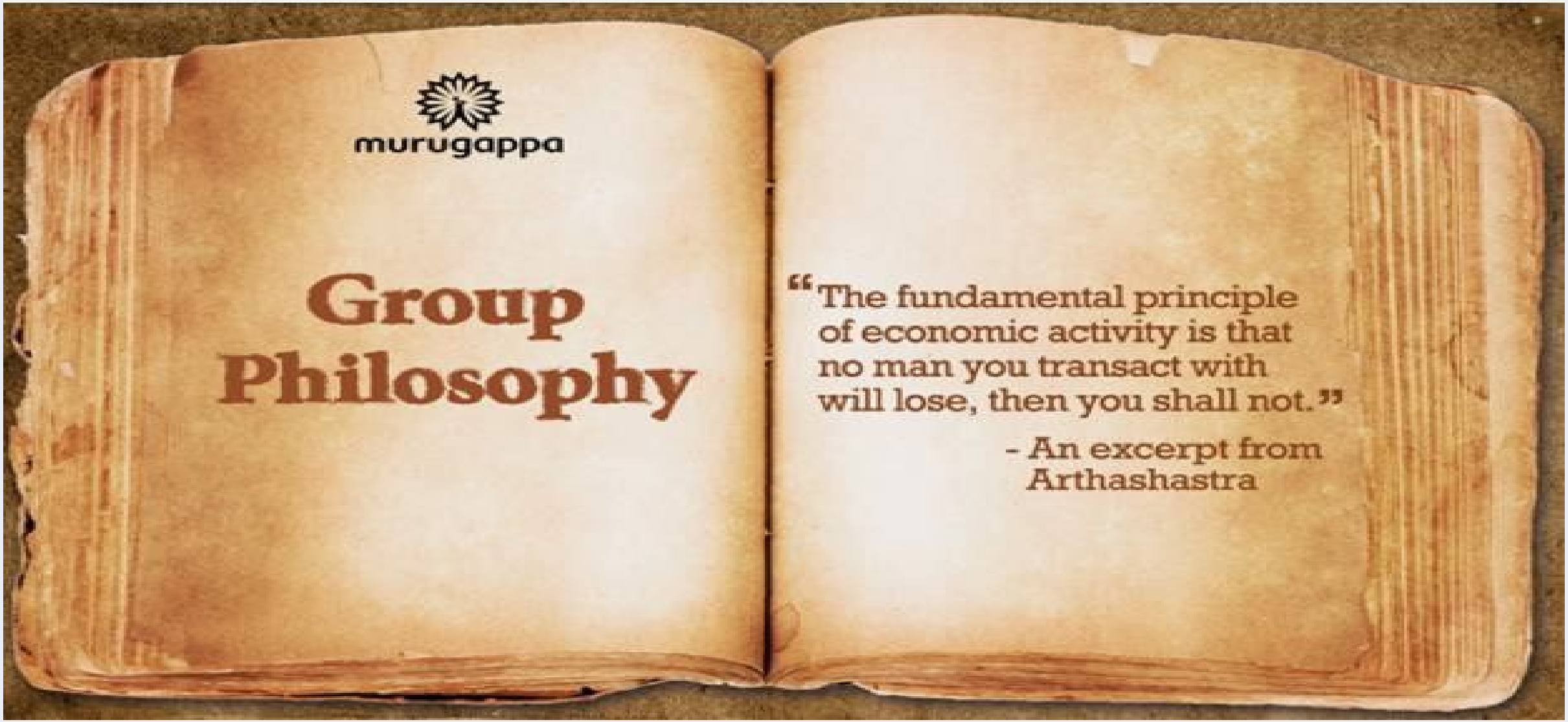
1 GROUP

50+ Countries market reach

94,000+ Employees

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The Philosophy We Cherish



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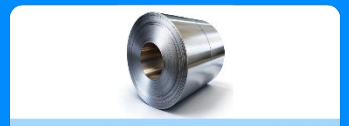
About Tube Investments of India Limited (“TII”)

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Tube Investments of India Limited (TII)

ENGINEERING DIVISION


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

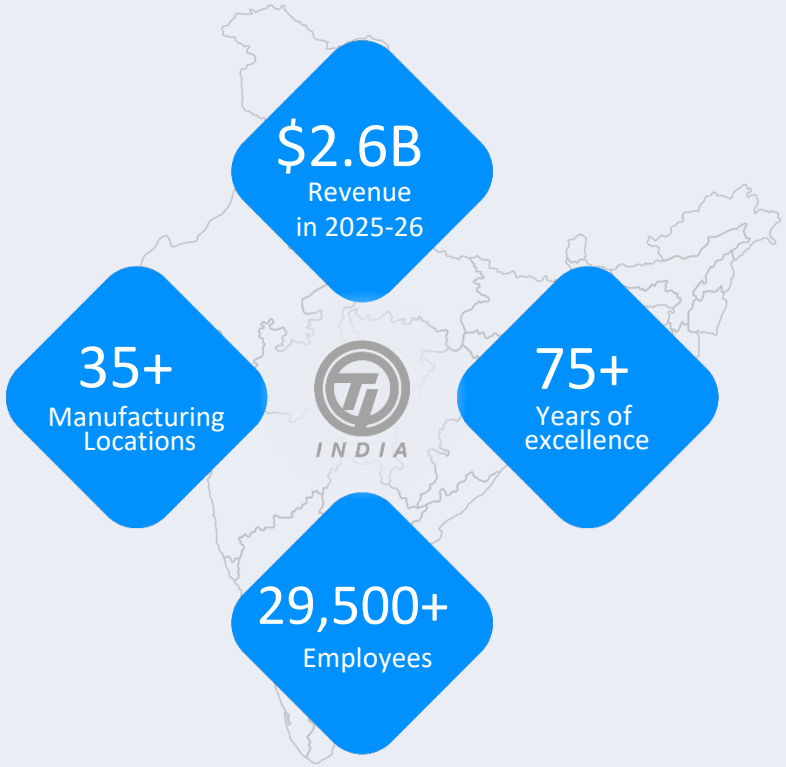

Fitness

OTHER BUSINESSES


Industrial Chains


TI Machine Building

INDIA'S PREMIER ENGINEERING COMPANY



SUBSIDIARIES


TI Clean Mobility Pvt Ltd.


CG Power and Industrial Solutions Ltd.

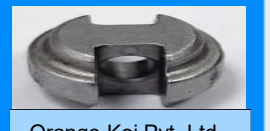

Shanthi Gears Limited


Sedis


TI Medical Pvt Ltd.


3xper Innoventure Ltd.

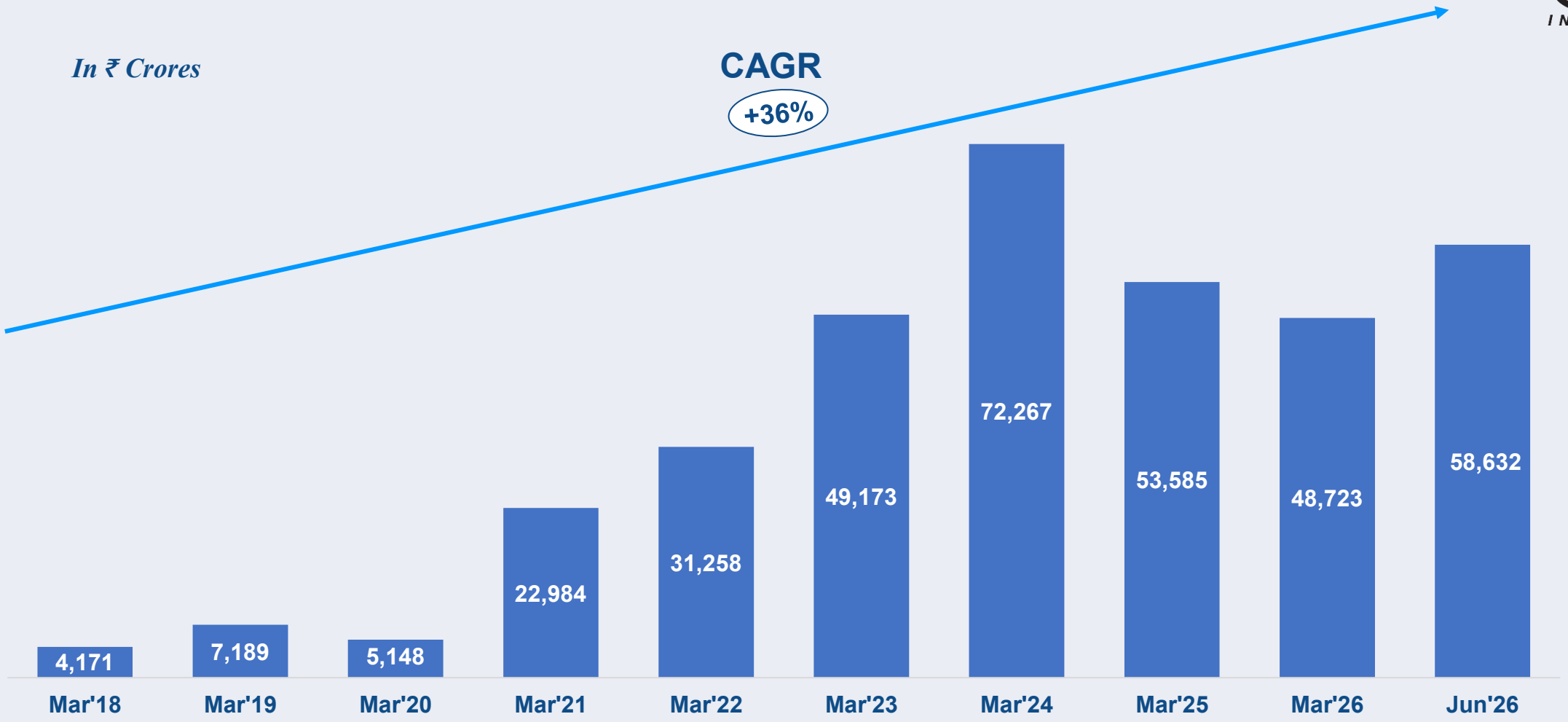

Kcaltech System India Pvt. Ltd.


Orange Koi Pvt. Ltd.

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Market Capitalization

In ₹ Crores

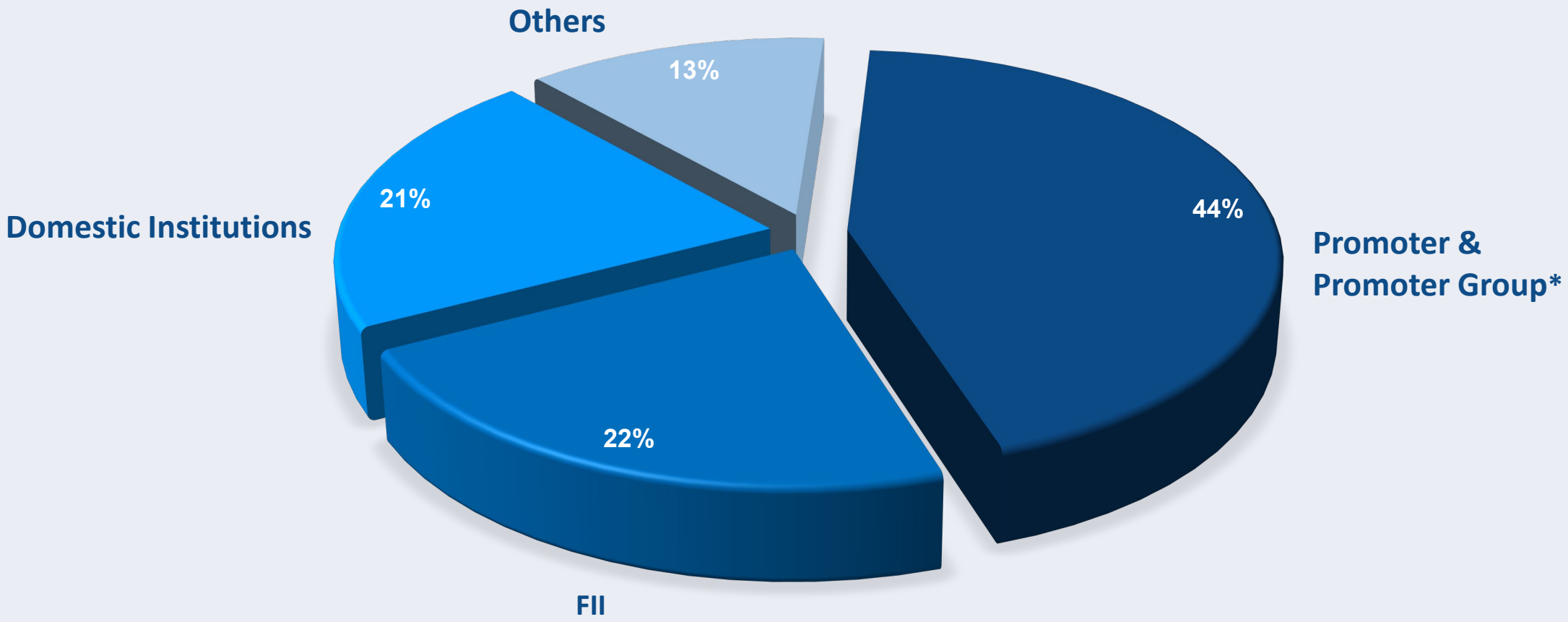


Period	Mar'18	Mar'19	Mar'20	Mar'21	Mar'22	Mar'23	Mar'24	Mar'25	Mar'26	Jun'26
Share Price as at period end	₹ 222	₹ 383	₹ 274	₹ 1,192	₹ 1,620	₹ 2,547	₹ 3,737	₹ 2,769	₹ 2,517	₹ 3,029

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Shareholding Pattern

As Of 30th June 2026



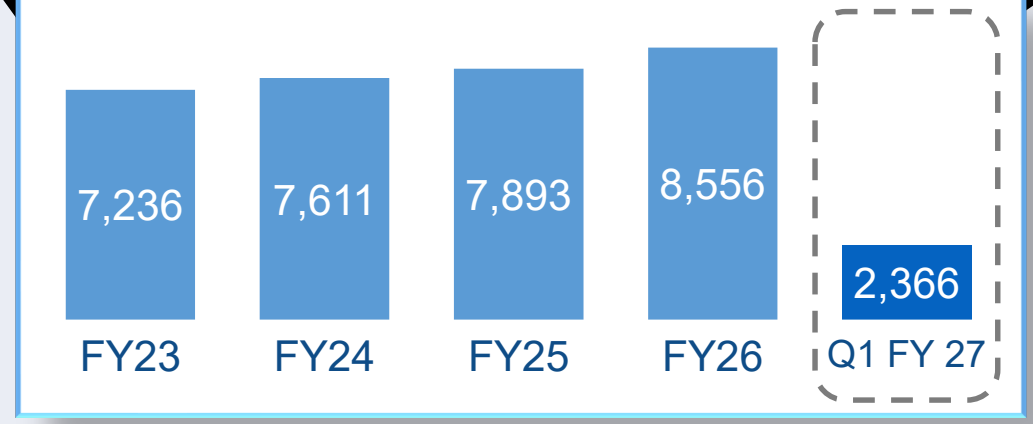
****Promoter Shareholding of 44% includes Ambadi Investment Limited 36% and Others 8%***

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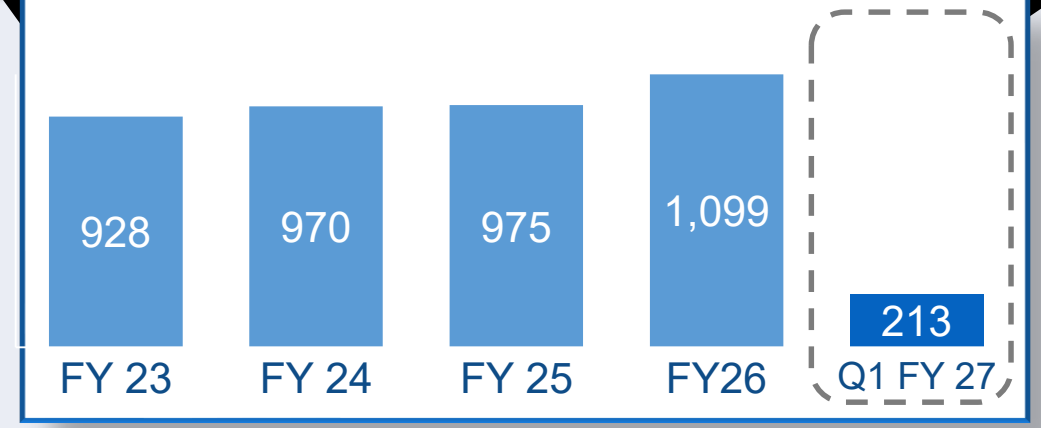
TII Performance Trends

₹ Crores

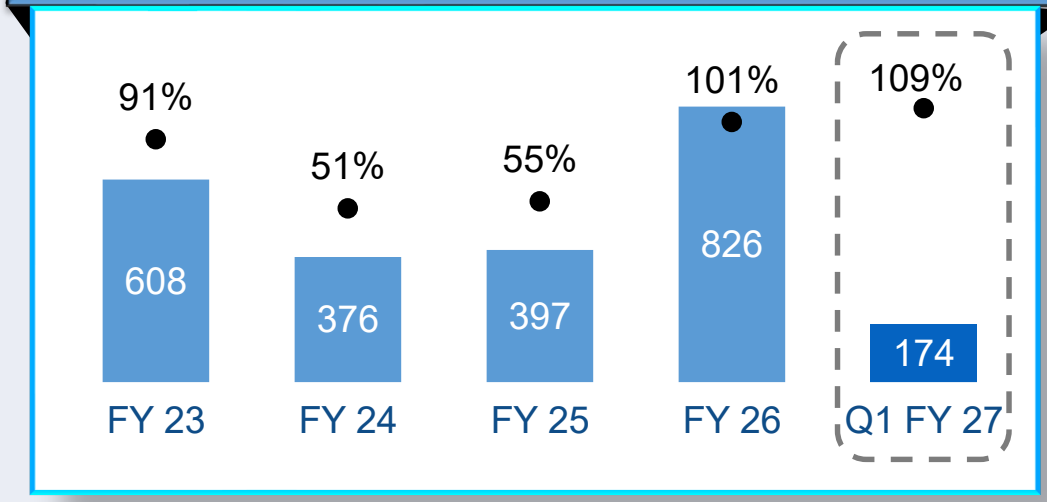
Revenue from operations (net of intersegment)



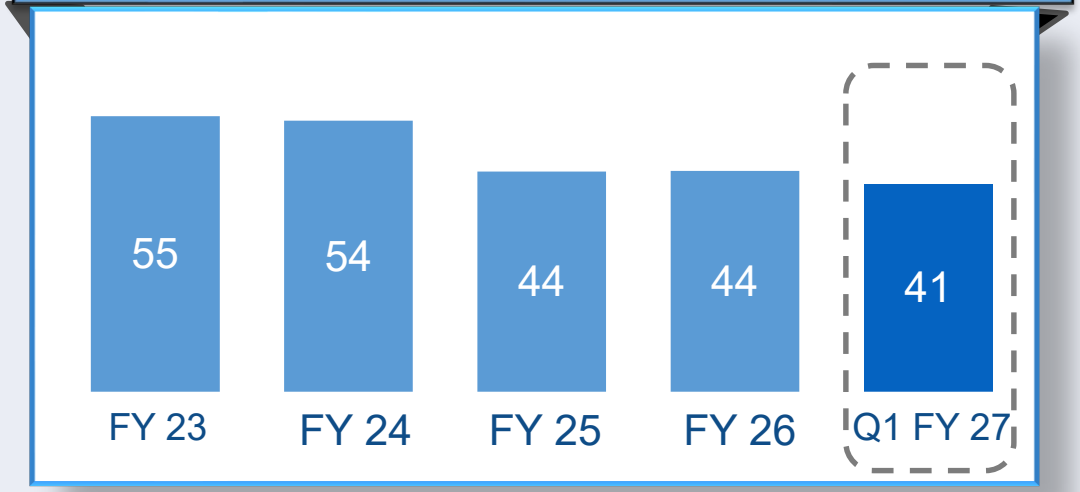
Profit Before Tax (before exceptional items & FV Gain)



FCF & FCF/PAT% (before FV Gain)



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



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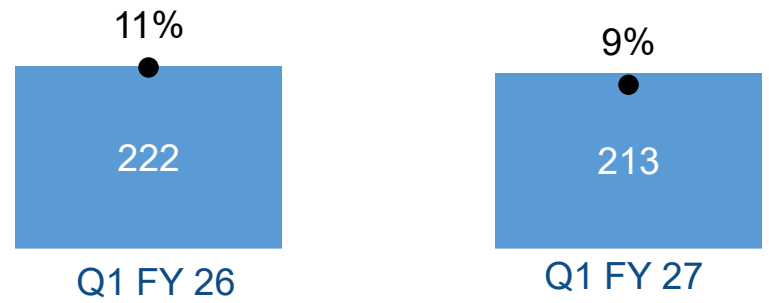
TII Standalone Performance

₹ Crores

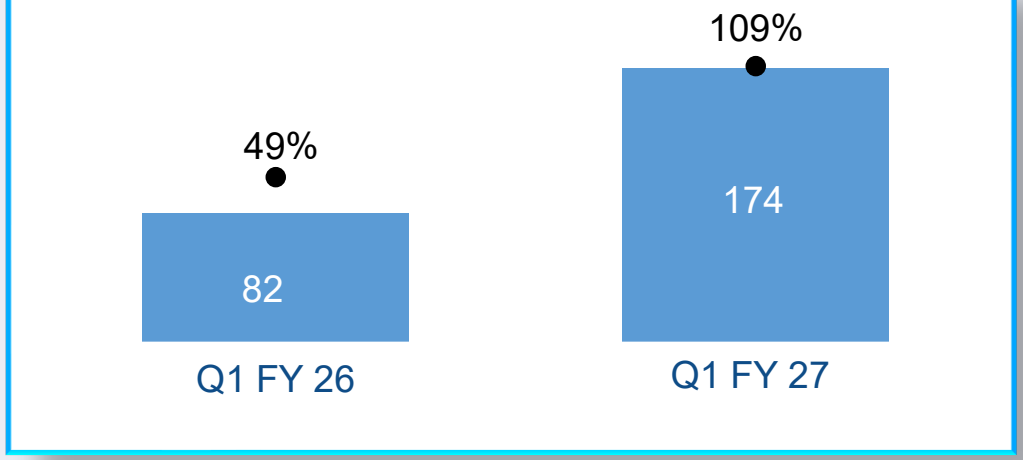
Revenue



PBT & PBT%



FCF & FCF/PAT%



ROIC% (pre-tax)



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INDIA

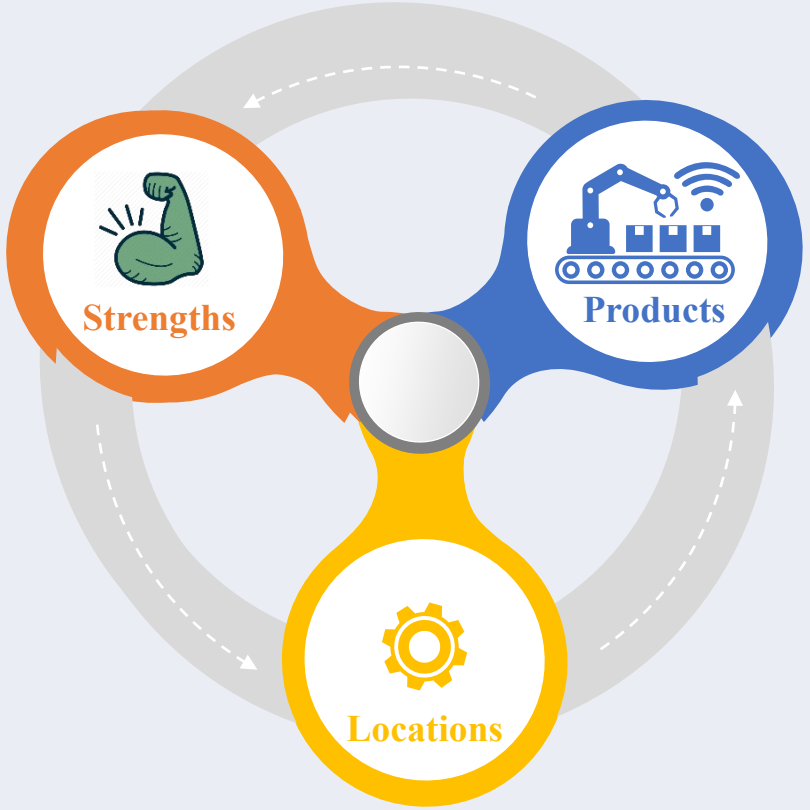


ENGINEERING DIVISION

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

Key Strengths

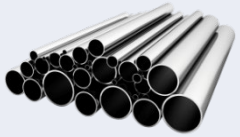
- Market leader and preferred Indian supplier in CDW Tubes.
- Major manufacturer with the engineering expertise to offer customized, application specific CRSS and tubular products.
- State-of-the-art manufacturing facilities proximately located to customers in key geographies.
- Ultrasonic testing, thermo 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 and Recognitions



TPI Exports BU was honored with the Large Scale Enterprise – Star Performance Export Excellence Award for the year of 2023-24 by EEPC on 15th May 2026.

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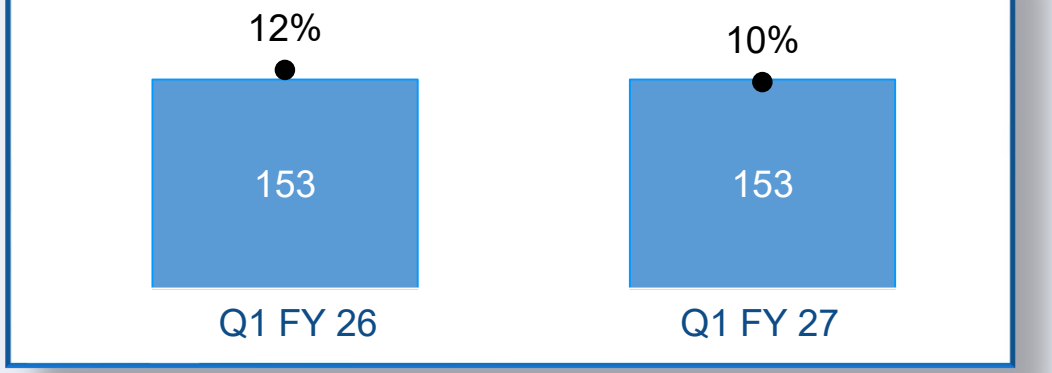
Engineering Division Performance

₹ Crores

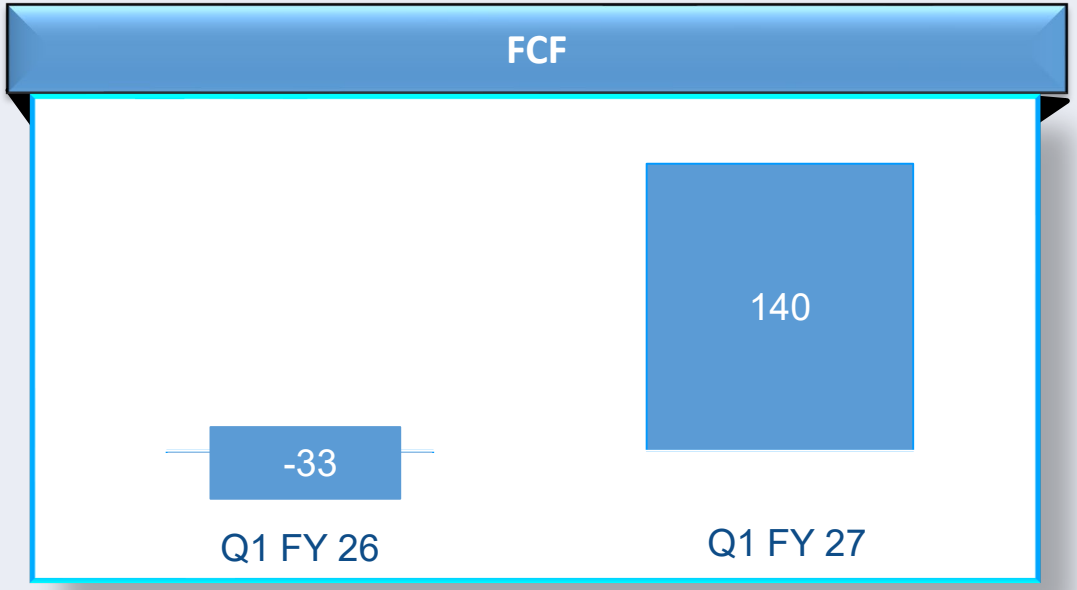
Revenue



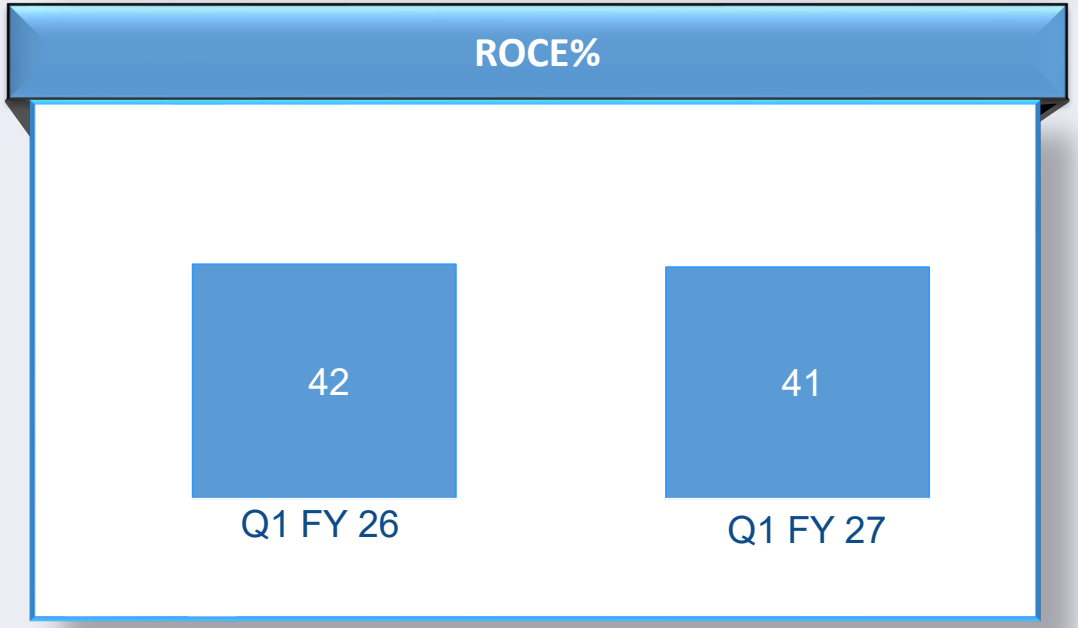
PBIT & PBIT%



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.



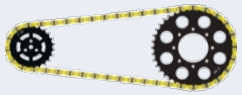
Manufacturing Locations

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

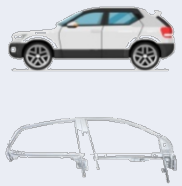
Products



Auto Kits (Rombo & Diamond Brand)



Auto Chains



Doorframes



Fine Blanking



Railway Coach Parts

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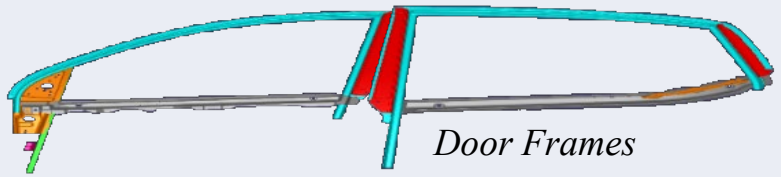
Cam Chains



After Market Brands







Door Frames



Divisional Channels



Side Impact Beams



Cowl Cross Beam

Railways







Fine Blanked Products

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Award and Recognitions



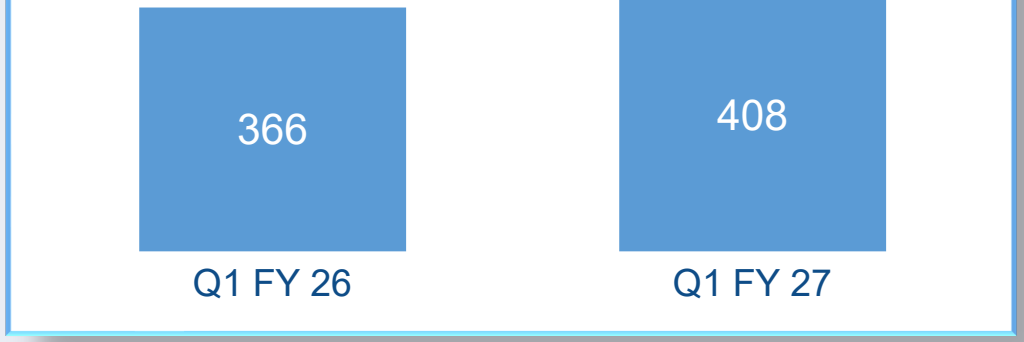
Auto Chains :Delivery and quality Appreciation Award

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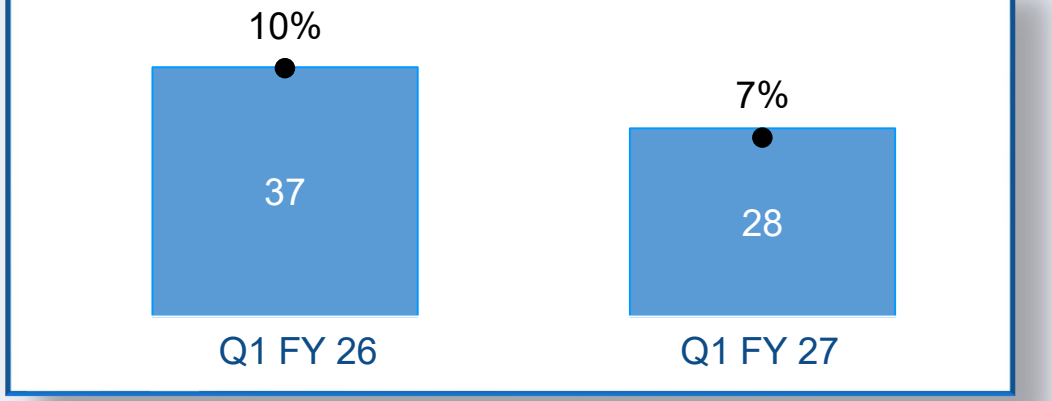
Metal Formed Products Division Performance

₹ Crores

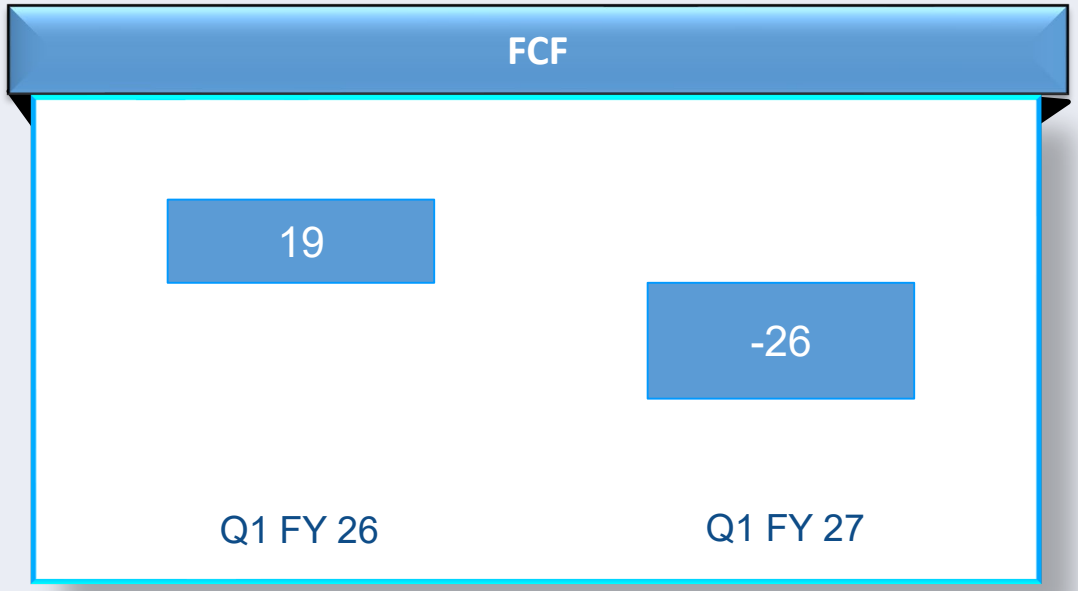
Revenue



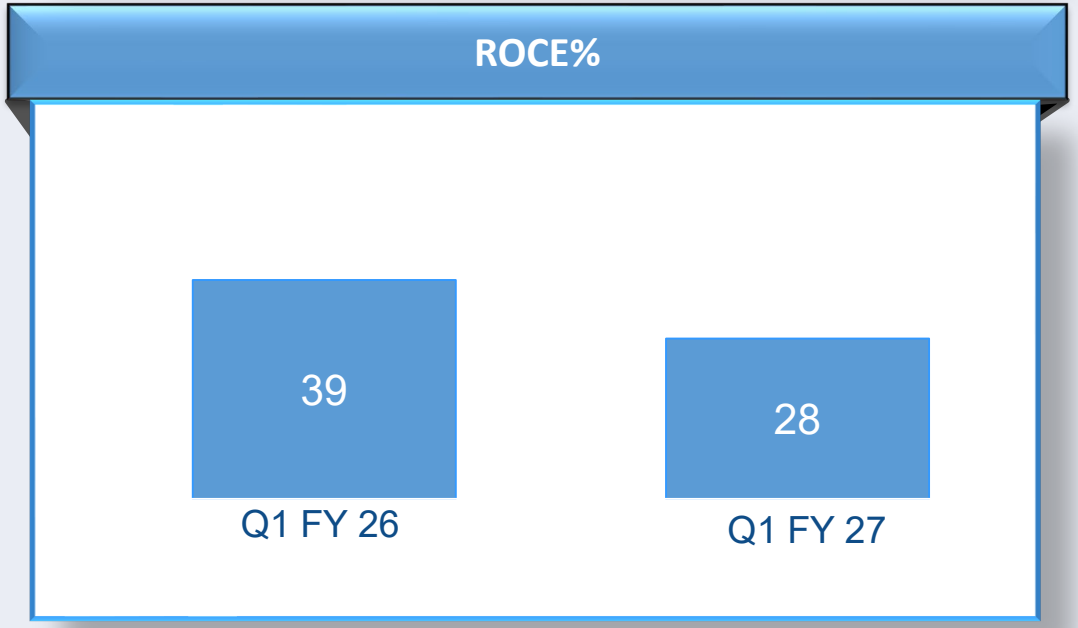
PBIT & PBIT%



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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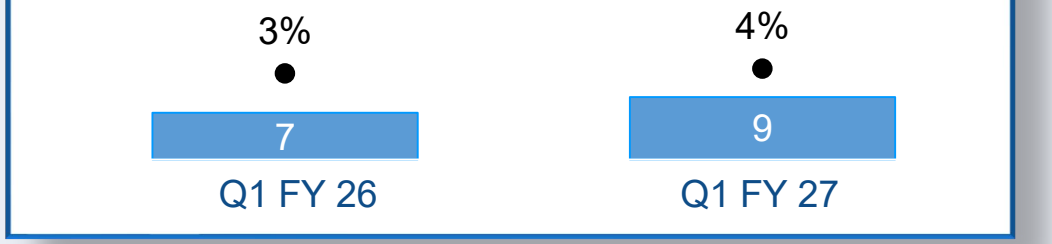
Mobility Division Performance

₹ Crores

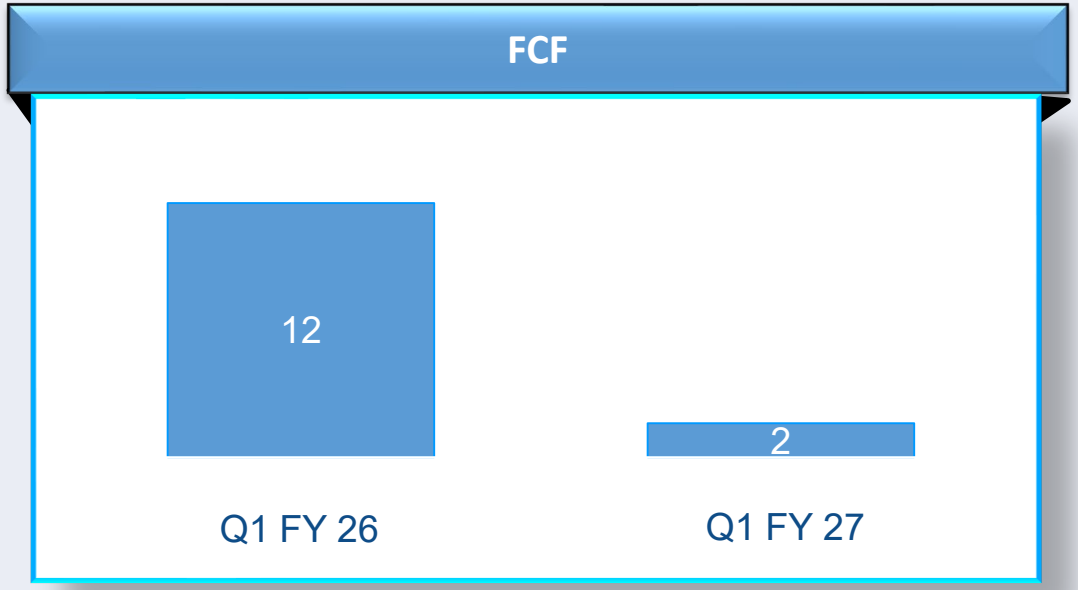
Revenue



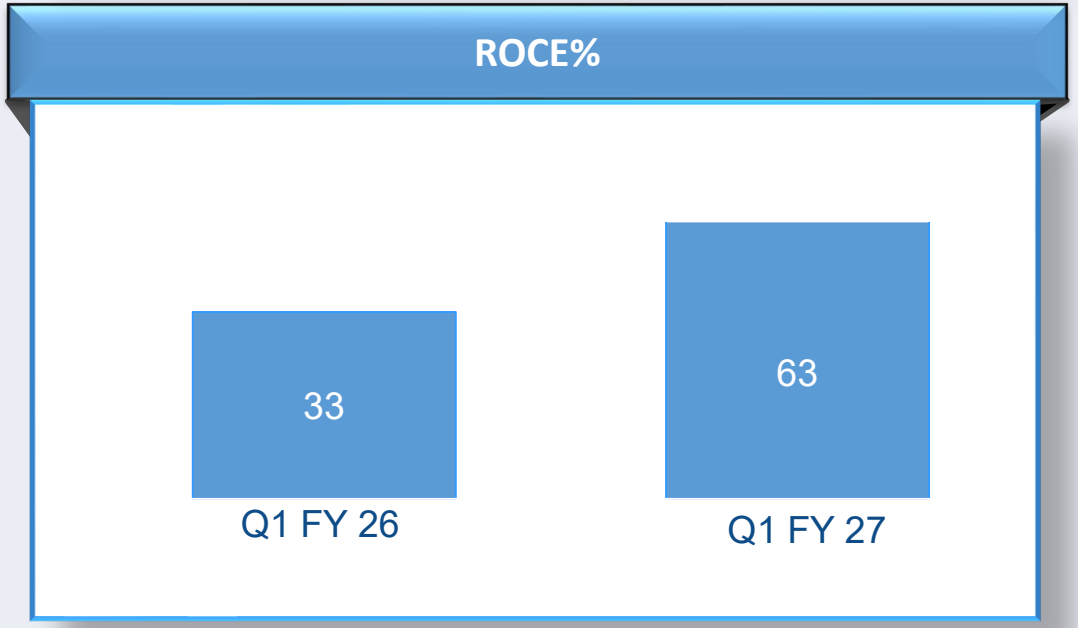
PBIT & PBIT%



FCF



ROCE%



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INDIA



OTHER BUSINESSES

POWERING INDUSTRIES WORLDWIDE - DELIVERING RELIABILITY

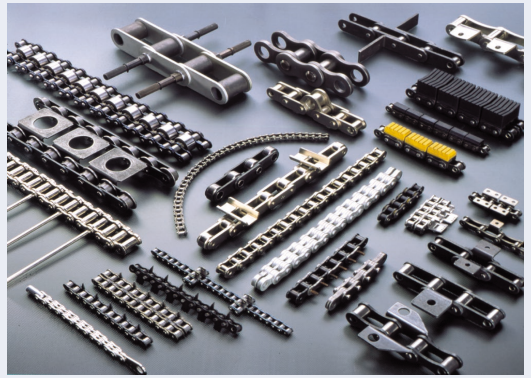
Global Standards Compliance:
Manufactured as per ANSI, British Standards and specifications

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



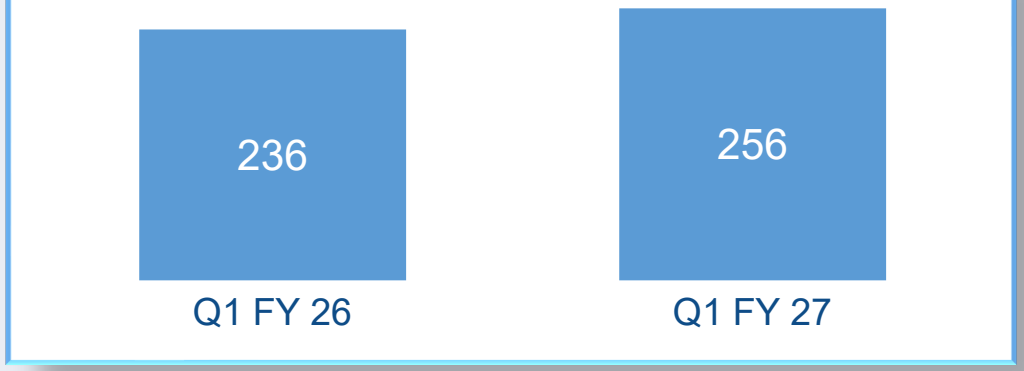
Agri Chains

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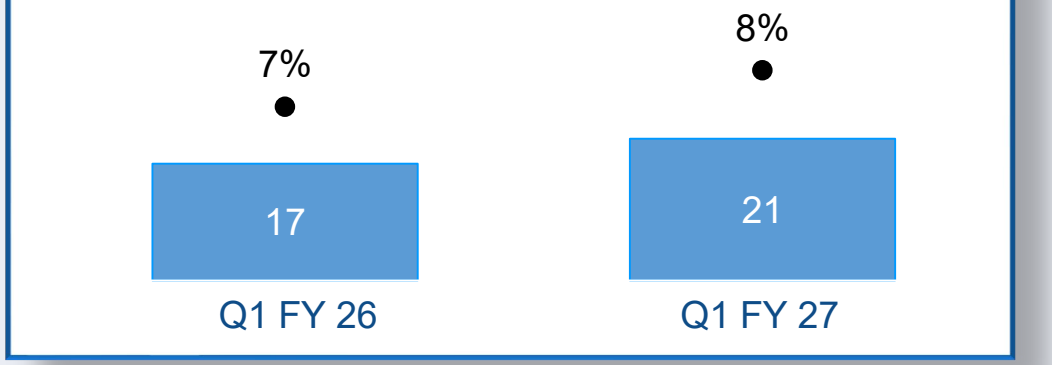
Other Divisions Performance

₹ Crores

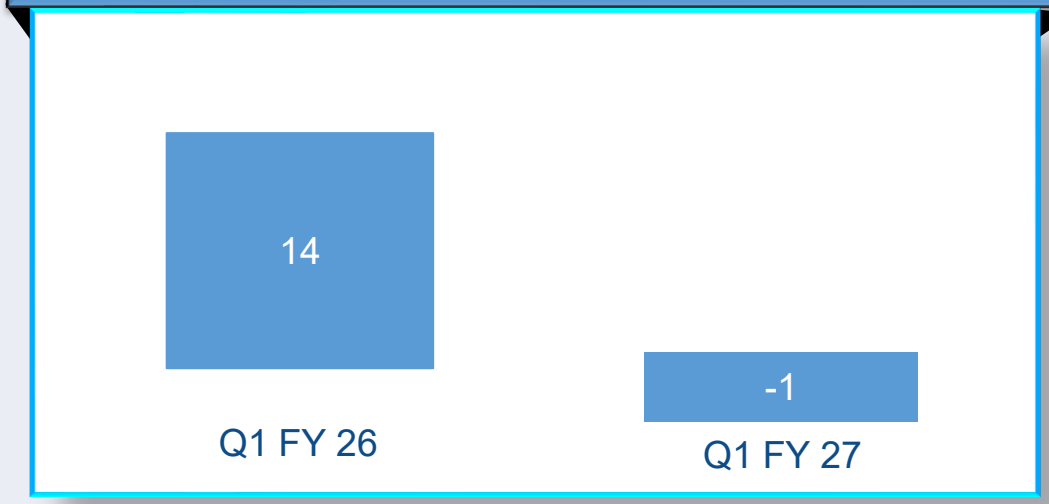
Revenue



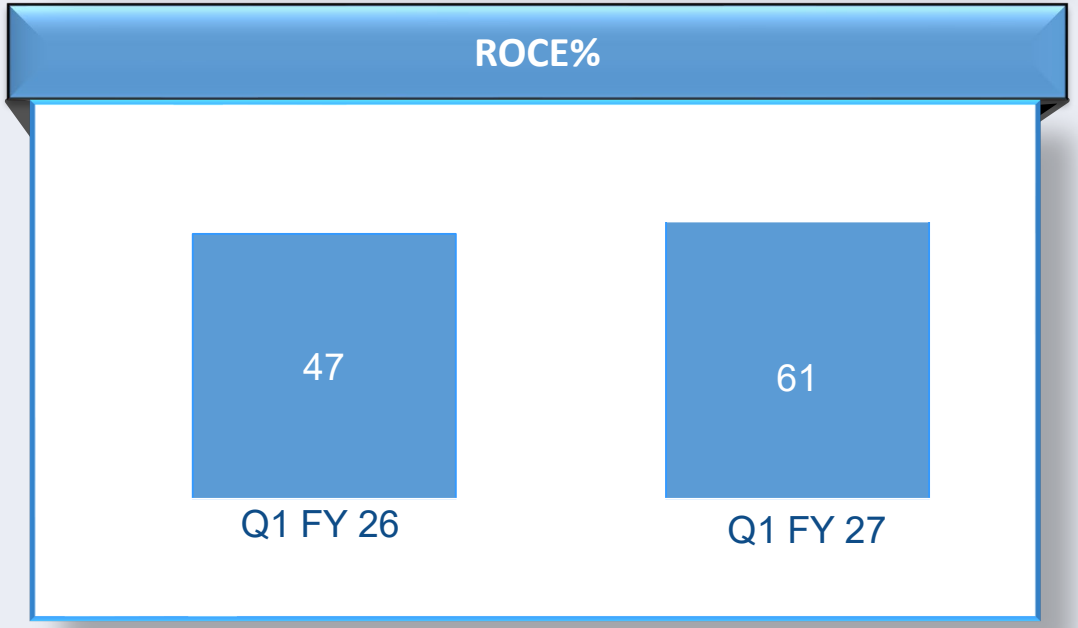
PBIT & PBIT%



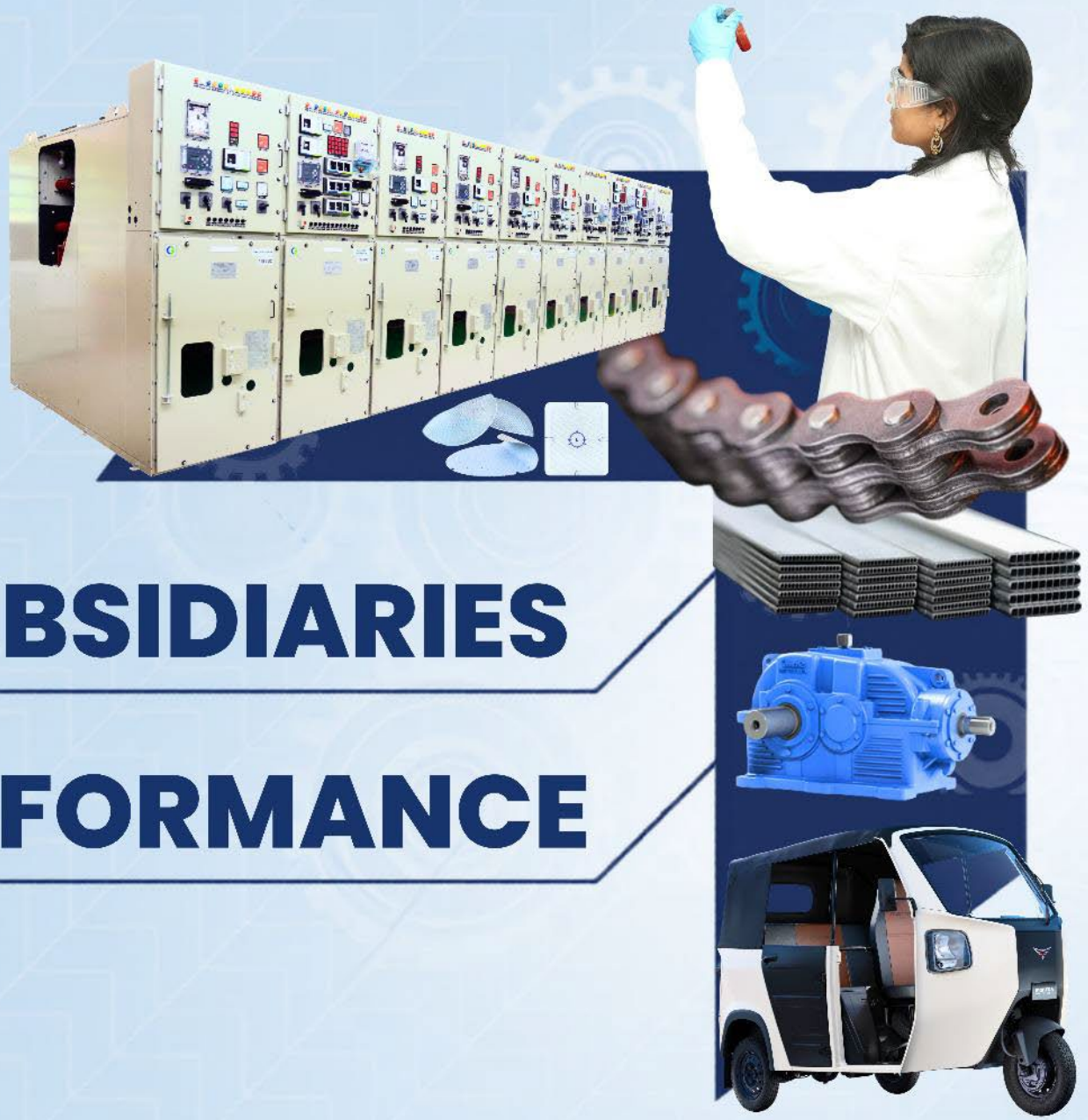
FCF



ROCE%



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TII SUBSIDIARIES PERFORMANCE

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”)

MONTRA ELECTRIC

MONTRA ELECTRIC

TIVOLT

JAYEM AUTOMOTIVES



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Montra Electric 3-Wheelers. Leading the Charge in Last-Mile Mobility

Montra Electric continues to solidify its presence in the last-mile mobility segment with its electric 3-wheeler portfolio.

With around 120 outlets covering 60% of the market, Montra Eletric has achieved significant volume growth. The introduction of the ‘Super Cargo’ variant (L5N) has allowed the brand to capture the e-cargo segment.



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Revolutionizing Farming with Sustainable Technology

Step into the future of agriculture with the groundbreaking E-27 e-tractor.

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 30th June 2026, TI Clean Mobility Pvt Ltd (TICMPL) holds 95.58% stake in IPLT.



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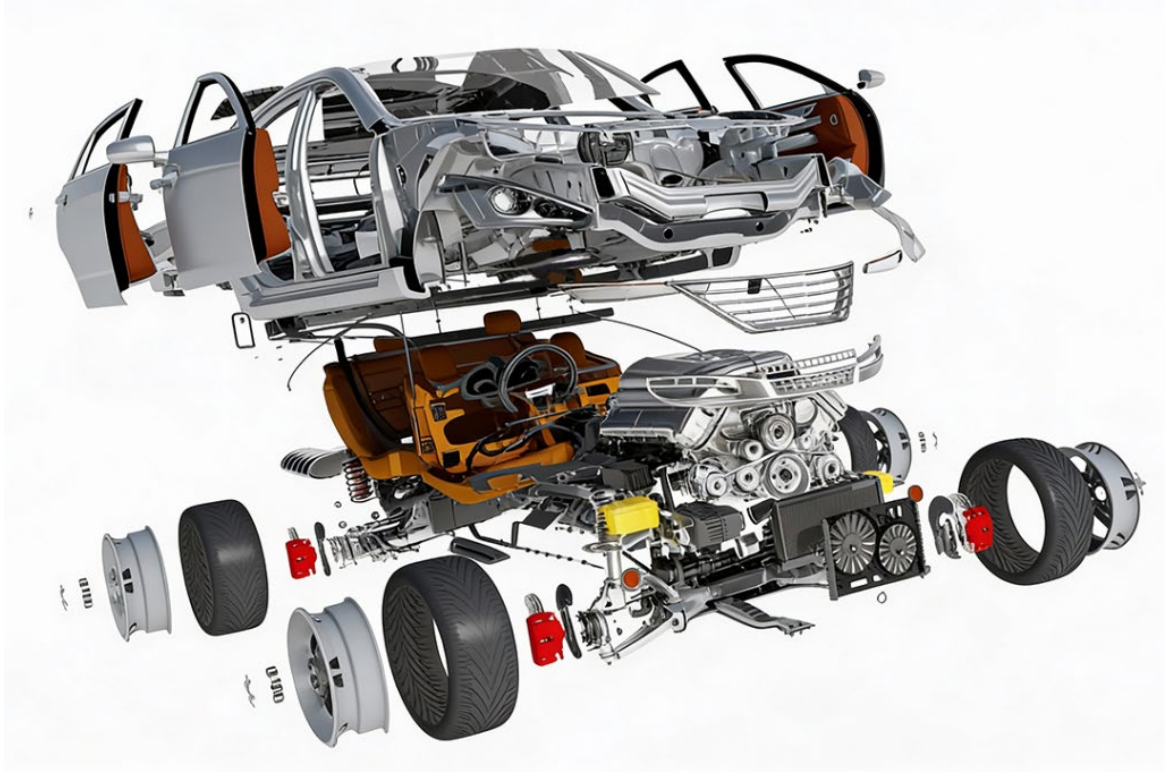
TIVOLT Electric Vehicles Private Limited is an EV venture of Murugappa group. It is a subsidiary of TI Clean Mobility Private Limited, formed with a mandate to address the Electric Small Commercial and Light Commercial Vehicle segment.

During April 2026, Montra Electric, the clean mobility brand of the Murugappa Group, announced the expansion of its electric small commercial vehicle (eSCV) portfolio with the launch of two new variants — EVIATOR 350 (32 kWh) and EVIATOR 350L+ (50 kWh).



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



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CG Power and Industrial Solutions Limited (“CG”)

- 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 **Fabless Semiconductor Design Business** through its subsidiary **Axiro Semiconductor Private Limited.**
- CG, on 4th June 2026, announced the commissioning of its extra high voltage (EHV) switchgear manufacturing facility, S3 Unit-II, in Pimpalgaon Garudeshwar, Nashik, Maharashtra. The Facility has been designed to meet the growing demand for reliable power transmission equipment across domestic and international markets.



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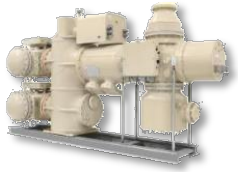
Key Business Verticals

POWER

Sub-segments



Transformers and Reactors



Switchgear



EPD

Key Clientele

INDUSTRIALS

Sub-segments



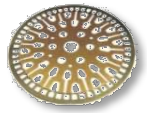
Railways



Motors



Drives & Automation



Stampings

Key Clientele

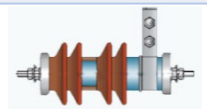
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Industrials: Consistently among the top players

	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.

- CG Semi Private Limited (CG Semi) announced the commencement of commercial production at its G1 Outsourced Semiconductor Assembly and Test facility in Sanand on 4th July 2026. The launch was held in the august presence of Hon'ble Prime Minister of India Shri Narendra Modi, Hon'ble Chief Minister of Gujarat Shri Bhupendra Patel and Hon'ble Minister of Railways, Information & Broadcasting and Electronics & Information Technology Shri Ashwini Vaishnaw.



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CG Power – Standalone Financials

₹ Crores

Particulars	Q1 25-26 Actual	Q1 26-27 Actual	CY QTD vs PY QTD (%)
Revenue from Operations	2,643	3,061	16%
PBIT	385	489	27%
Interest	1	2	80%
PBT	383	487	27%
PAT	286	364	27%

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CG Power – Consolidated Financials

₹ Crores

Particulars	Q1 25-26 Actual	Q1 26-27 Actual	CY QTD vs PY QTD (%)
Revenue from Operations	2,878	3,281	14%
PBIT	366	426	17%
Interest	2	4	60%
PBT	364	423	16%
PAT	267	308	16%

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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



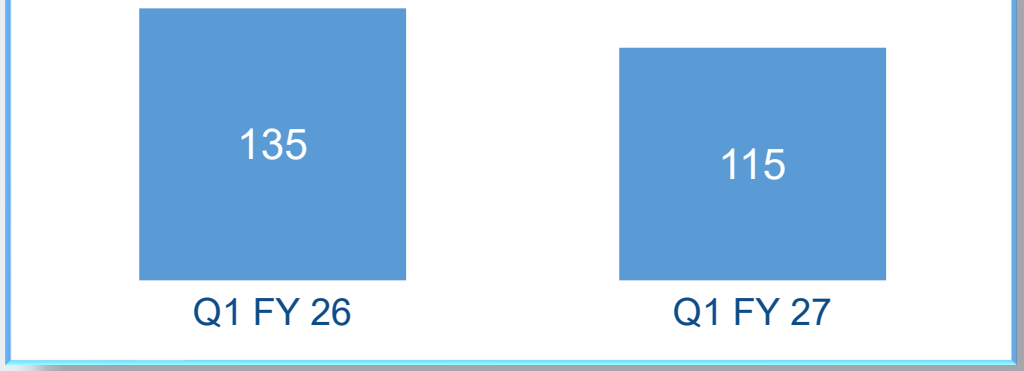
Worm Products for Elevator Application

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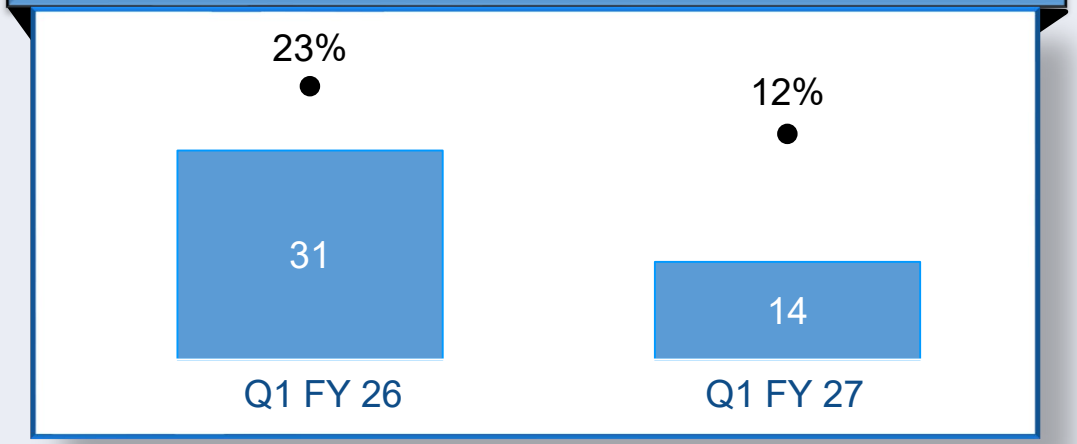
Shanthi Gears Limited Performance

₹ Crores

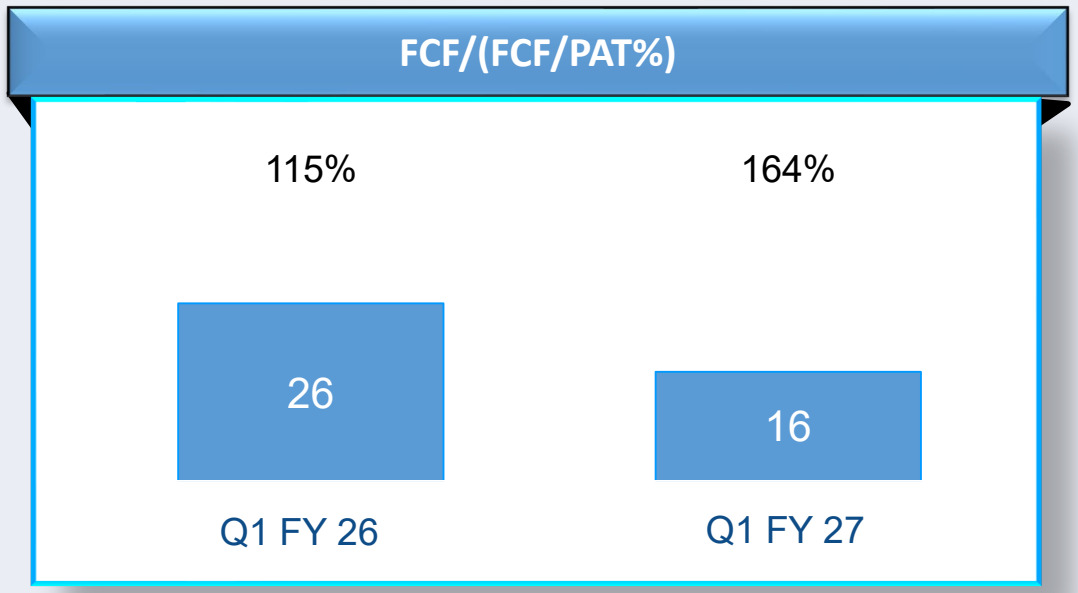
Revenue



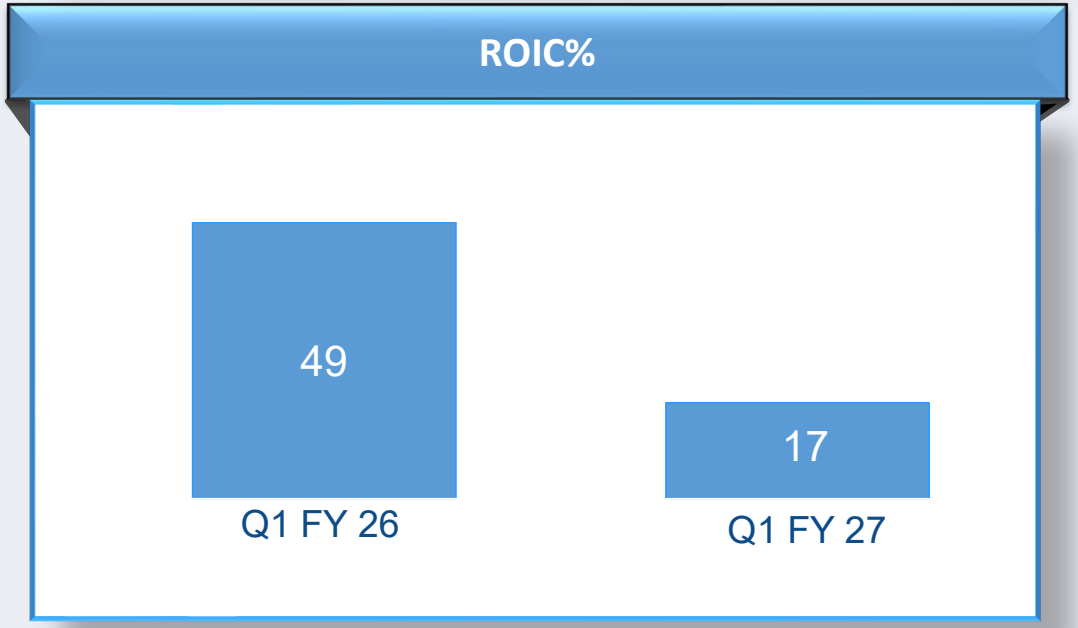
PBIT & PBIT%



FCF/(FCF/PAT%)



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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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 & Haryana



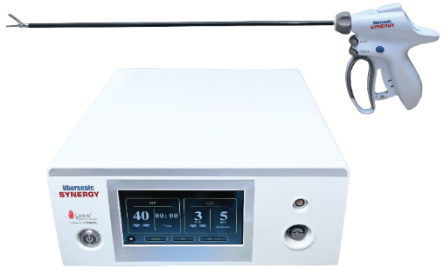




PRODUCT PORTFOLIO

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







IV Cannula with Wings and Injection Port



Neo IV Cannula



Safety IV Cannula with Wings and Injection Port



IV Cannula One-Way

In March 2026, TI Medical completed the acquisition of medical plastic consumable business of Medicura Devices.

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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







During quarter ended June 30 2026, ₹25 Cr. was invested towards subscription of Series D Compulsorily Convertible Preference shares.

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PRECISION-ENGINEERED ALUMINIUM PRODUCTS FOR ADVANCED HVAC APPLICATIONS





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

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Orange Koi Private Limited

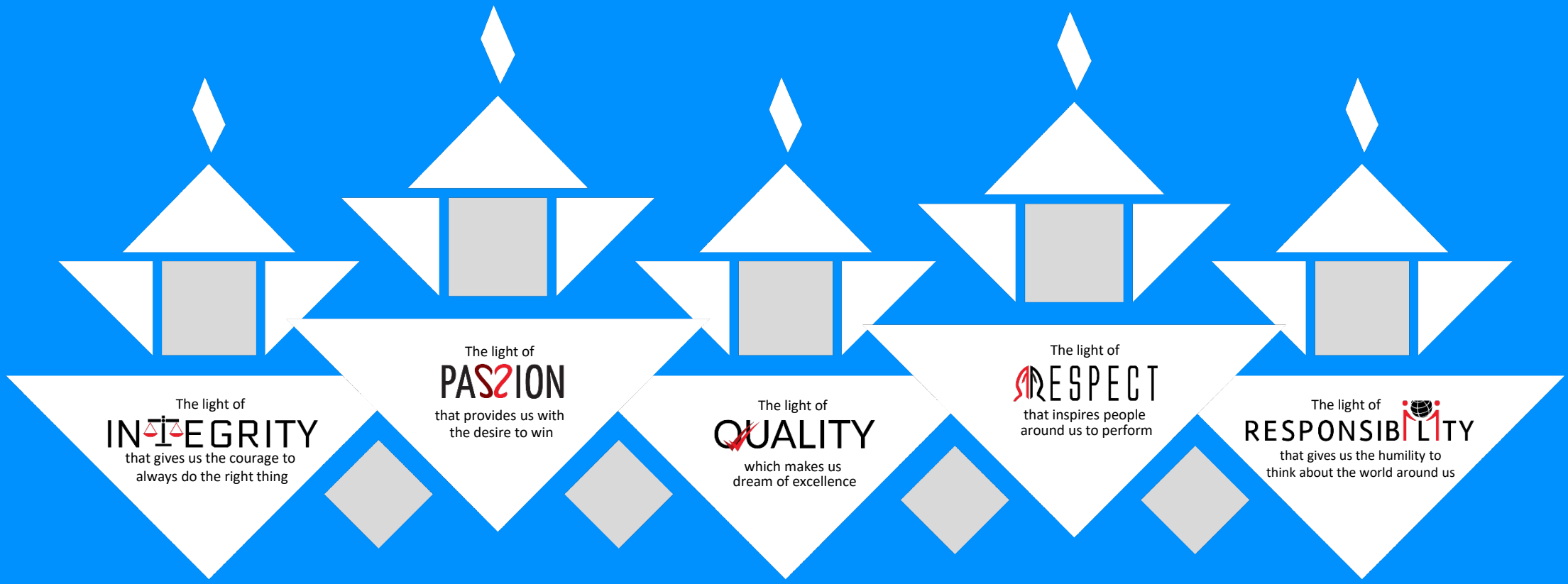


- Orange Koi became a subsidiary of TII in April 2026 upon acquisition of 76.24 % of paid up equity share capital.

- Orange Koi is engaged in the business of manufacturing precision parts for medical and defense industry using specialized technologies including metal injection molding and additive manufacturing.

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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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Email ID

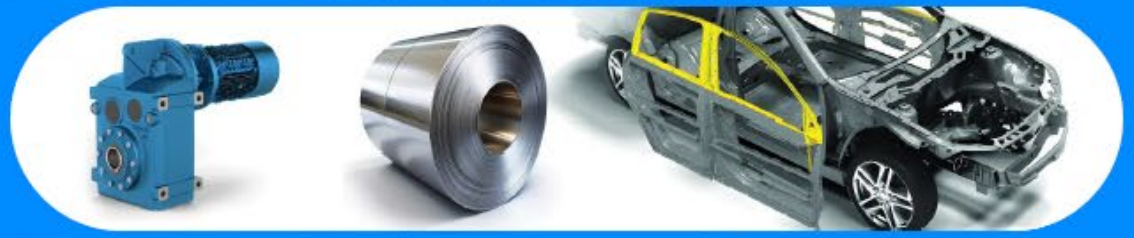
S Krithika – Company Secretary
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AN Meyyappan – Chief Financial Officer
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Thank You

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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