



E:KRBL/BIBHU/STK_EX_1617/62
December 2, 2016

| | |
|---|---|
| The General Manager BSE Limited Floor 25, Phiroze Jeejeebhoy Towers Dalal Street, Mumbai – 400 001 | National Stock Exchange of India Limited "Exchange Plaza", C-1, Block-G Bandra-Kurla Complex Bandar (E), Mumbai-400051 |
| Scrip Code: 530813 | Symbol: KRBL Series: Eq. |

Dear Sir/Madam,

Sub: Corporate Presentation on Financial Results for the Second Quarter (Q2) and Half Year Ended September 30, 2016

Pursuant to the provisions of Regulation 30 read with Para A of Part A of Schedule III of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ("Listing Regulations"), we are pleased to enclose herewith Corporate Presentation of the Company on Financial Results for the Second Quarter (Q2) and Half Year Ended September 30, 2016

This is for your information and records.

Thanking you,

Yours Faithfully
For KRBL Limited

Raman Sapra
Company Secretary
M.No. A29044
267, Street No. 18 Pratap Nagar,
Delhi-110007

Corporate Office : C-32, 5th & 6th Floor, Sector-62, Noida-201301, Gautambudh Nagar, (U.P.), INDIA.
Regd. Office : 5190, Lahori Gate, Delhi - 110 006, INDIA. Tel. : +91-11-23968328, Fax : +91-11-23968327, CIN No. L01111DL1993PLC052845
Tel. : +91-120-4060300, Fax : +91-120-4060398. E-mail : mails@krblindia.com. Visit us at : www.krblrice.com

WORLD'S LARGEST RICE MILLERS & BASMATI RICE EXPORTERS



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Tel. : +91-120-4060300, Fax : +91-120-4060398. E-mail : mails@krblindia.com. Visit us at : www.krblice.com

WORLD'S LARGEST RICE MILLERS & BASMATI RICE EXPORTERS

**DIFFICULT
TIMES.
DEFINING
RESULTS.**



Corporate Presentation

September, 2016

IMPORTANT NOTICE



Safe Harbor

This presentation contains statements that contain “forward looking statements” including, but without limitation, statements relating to the implementation of strategic initiatives, and other statements relating to KRBL Limited and its affiliated companies (“KRBL”) future business developments and economic performance.

While these forward looking statements indicate our assessment and future expectations concerning the development of our business, a number of risks, uncertainties and other unknown factors could cause actual developments and results to differ materially from our expectations.

These factors include, but are not limited to, general market, macro-economic, governmental and regulatory trends, movements in currency exchange and interest rates, competitive pressures, technological developments, changes in the financial conditions of third parties dealing with us, legislative developments, and other key factors that could affect our business and financial performance.

KRBL undertakes no obligation to periodically revise any forward looking statements to reflect future / likely events or circumstances.



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INDUSTRY ANALYSIS



❖ No Threat of Substitute Products.

- Basmati Rice is just 2% of total Rice Production in the World
- Basmati Rice is GI Product and Grown only in India (70%) and Pakistan (30%).
- Simple product - no hi-tech processing required / no fad / processed food.
- Highest quality and high valued product, not commodity!

❖ Threats

- No China competition / other countries threat - Grown only in India and Pakistan.
- Govt. regulations - no government / regulatory interference.
- Economy, war, global crop patterns etc. - No major impact.

❖ Hold on distributors

- Largest and established player.
- FMCG nature.
- Trust with distributors

❖ Hold on Farmers

- R & D advantage - creator of 1121 variety.
- Seed distribution - only player to distribute seeds.
- Doing organic and contract farming.

❖ Competition

- Pricing Premium over competition.
- New entrants - require huge marketing budgets and organizational management to manage entire supply chain.

INVESTMENT HIGHLIGHTS



Leading Market Position

- ❖ World's largest Rice Millers and Basmati Rice Exporters.
- ❖ India's largest selling Branded Basmati Rice Company.
- ❖ Strong Brand presence through collaborations with global retail chains.
- ❖ Leading position in Saudi Arabia's market- world's largest Basmati Rice market.
- ❖ Largest contract farming in basmati rice in the world.
- ❖ Exports to 73 Countries.
- ❖ Largest manufacturer of Basmati Rice Seed.

Leading Brands

- ❖ "India Gate", the flagship brand of Company, is the topmost selling rice in the Branded Rice segment, both in India and Overseas market.
- ❖ India Gate leads suite of well recognize and leader brands with continuous focus on improving visibility via ATL & BTL activities
- ❖ Brand include - India Gate, Taj Mahal, Doon, Nur Jahan and many more.
- ❖ 25% share in the Branded Basmati Rice sale in exports market.
- ❖ More than 30% share in the Branded Basmati Rice sale in domestic market.

Best-in-Class Operations

- ❖ India's first fully integrated and scalable rice company.
- ❖ Rice manufacturing capacities of 195 MT per hour.
- ❖ Good realizations - export price per MT commands a premium of more than 30% over the Industry average.
- ❖ Wide marketing network with presence at 6,72,000 retail outlets spread over all towns and cities of the Country.
- ❖ 35% basmati seeds in India are provided by KRBL.

Strong Financial Performance

- ❖ Short-term loan of the company rated [ICRA]A1+ by ICRA, indicating highest credit quality in the industry
- ❖ Long Term Loan of the Company under (ICRA) AA- by ICRA, indicating high degree of safety.
- ❖ Net Worth of the Company increased from Rs.1,325 crores in FY 2015 to Rs. 1,624 crores in FY 2016.



BUSINESS OVERVIEW



- ❖ Founded in 1889 in Faisalabad, Pakistan and incorporated in 1993, KRBL is India's first integrated rice company.
- ❖ Engaged in seed development and multiplication, contract farming, production and marketing of Basmati rice.
- ❖ Being an integrated player, the Company generates value-added by-products like bran oil, de-oiled cakes and uses rice husks for captive power plant.
- ❖ Branded Basmati rice Company, with manufacturing capacities of 195 MT / per hour.
- ❖ Last 3-year Net Sales Growth at CAGR of 17.49% and EBITDA Growth at CAGR of 21.14%.
- ❖ Last 3-years average Return on Capital Employed of 19.12%
- ❖ Last 3-years average Return on Equity of 26.21%.

Key Brands

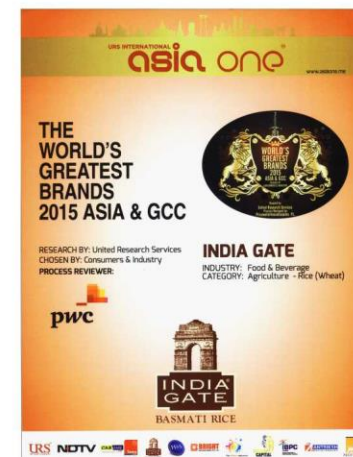
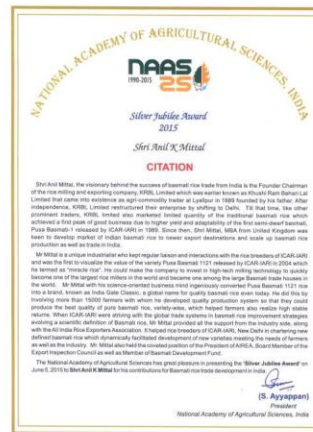


AWARDS AND RECOGNITION



During FY 2015-16, KRBL Limited won several awards on account of its contribution to the Industry and its India Gate Basmati Rice as per below:

| Sr. | Details |
|-----|---|
| 1. | Guinness World Record for display of the heaviest bag of India Gate Basmati Rice (weighing 557 kg) in Gulf Food Exhibition at Dubai World Trade Center, Dubai, UAE. |
| 2. | Silver Jubilee Award to Sh. Anil Kumar Mittal, Chairman and Managing Director, KRBL Limited, for his contributions to Basmati Rice Trade Development in India. |
| 3. | World's Greatest Brands 2015, ASIA & GCC, awarded by URS and process reviewed by PWC. |



BUSINESS OVERVIEW



State Of The Manufacturing Facilities With Distribution Network In India And Across the World

We export to 73 countries across the World



Rice Business

| Plant Location | Function | Capacity (MTn/hr) | Grading & Packing (MTn/hr) |
|-----------------------|--------------------------------|-------------------|----------------------------|
| Gautam budh Nagar, UP | Rice Processing | 45 | 30 |
| Dhuri, Punjab | Rice processing | 150 | 60 |
| Alipur, Delhi | Grading, Sorting and Packaging | -- | 30 |
| Sonipat, Haryana | Grading, Sorting and Packaging | -- | 20 |
| Total | | 195 | 140 |

Energy Business

| Plant Location | Function | Capacity (MW) |
|----------------|--------------------|---------------|
| Punjab | Biomass | 12.30 |
| Uttar Pradesh | Biomass | 5.25 |
| Sub-Total (A) | Biomass | 17.55 |
| Maharashtra | Wind | 33.50 |
| Rajasthan | Wind | 11.85 |
| Tamil Nadu | Wind | 8.10 |
| Karnataka | Wind | 11.10 |
| Andhra Pradesh | Wind | 10.50 |
| Madhya Pradesh | Wind | 12.00 |
| Gujrat | Wind | 14.70 |
| Sub-Total (B) | Wind | 101.75 |
| Madhya Pradesh | Solar | 15.00 |
| Sub-Total (C) | Solar | 15.00 |
| Total (A+B+C) | Biomass/Wind/Solar | 134.30 |

Paddy Storage Area



Processed Rice Storage Area



Testing lab at the plant



MANAGEMENT & BOARD



Extensive Management Expertise in Rice Industry and Operation Across the Value Chain

Key Executive

Anil Kumar Mittal
*Chairman and
Managing Director*



Arun Kumar Gupta
*Joint Managing
Director*



Anoop Kumar
Gupta
*Joint Managing
Director*



Priyanka Mittal
*Whole-time
Director*



Ashok Chand
*Whole-time
Director*



Rakesh Mehrotra
*Chief Financial
Officer*



Back Ground

- ❖ Visionary of the company, he provide strategic direction to all aspects of the business.
- ❖ Over 42 years of experience in the Rice industry.
- ❖ Founder & Former President of All India Rice Exporters Associations.
- ❖ He is a Art Graduate from Delhi University.

- ❖ Expert on Basmati Paddy Supply Chain Management as well as on Paddy Milling Technology.
- ❖ Over 34 years of experience in the Rice industry.
- ❖ Executive Member of the Basmati Rice Farmers & Exporters Development Forum.
- ❖ He is a Commerce Graduate from Delhi University.

- ❖ Financial Architect & the Chief Strategist of the Company.
- ❖ Over 33 years of experience in the Rice industry.
- ❖ Former Executive Committee Member of All India Rice Exporters Associations.
- ❖ He is a Science Graduate from Delhi University.

- ❖ Overseas Brand Management of KRBL brand
- ❖ Handles corporate affairs and public engagement at Domestic & International level.
- ❖ Over 16 years of experience in the field of International Marketing & sales Management.
- ❖ Owner President Management Programme from Harvard Business School and BS in Business Management from University of Southern California, LA.

- ❖ Over 42 years of experience in the field of engineering and food processing industry.
- ❖ Previously worked with some of the leading FMCG and consumer companies in the world.
- ❖ He has also obtained Certificate of Entrepreneurship from IIM, Ahmedabad.

- ❖ Over 31 years of experience in the field of finance.
- ❖ Previously worked with some of the leading corporate like Surya Group, Lakhani Group, Sanjay Dalmia Group, Mafatlal Group and Onida Group.
- ❖ He is a Chartered Accountants from ICAI and Commerce Graduate from BHU.

FINANCIAL OVERVIEW



Financial Summary

(Rs. In Crores)

| OPERATING RESULTS (Consolidated) | IND AS (FY 2016-17) Q2 | IND AS (FY 2015-16) Q2 | H1 (FY 2016-17) | H1 (FY 2015-16) |
|---|-------------------------------|-------------------------------|---------------------|---------------------|
| Gross Revenue (Including Other Income) | 735.16 | 920.16 | 1537.87 | 1918.25 |
| EBITDA EBITDA Margin (%) | 153.06 21.41% | 140.18 15.26% | 293.91 20.46% | 282.64 14.76% |
| Profit Before Tax (PBT) PBT Margin (%) | 124.90 17.42% | 116.91 12.72% | 228.29 15.89% | 220.95 11.54% |
| Profit After Tax (PAT) PAT Margin (%) | 98.41 13.76% | 86.49 9.40% | 178.81 11.63% | 159.53 8.32% |
| EPS (in Rs.) | 4.18 | 3.68 | 7.60 | 6.80 |

FINANCIAL OVERVIEW



(Rs. in Crores)

| Operating Results (Consolidated) | FY 2013 | FY 2014 | FY 2015 | FY 2016 |
|--|----------|----------|----------|----------|
| Operating Revenue from Operation | 2,080.39 | 2,910.46 | 3,197.19 | 3,428.13 |
| Other Income | 10.73 | 14.54 | 6.11 | 7.51 |
| Total Income | 2,091.12 | 2,925.00 | 3,203.30 | 3,435.64 |
| Operating Expenditure | 1,787.01 | 2,469.91 | 2,671.45 | 2,895.03 |
| EBITDA | 304.11 | 455.09 | 531.86 | 540.61 |
| EBIDTA Margin | 14.54% | 15.56% | 16.60% | 15.74% |
| Depreciation | 50.56 | 57.66 | 52.69 | 50.06 |
| Interest | 77.51 | 76.02 | 80.89 | 63.42 |
| Exceptional Items -currency Fluctuations (Gain)/Loss | (8.16) | (5.02) | 4.19 | (2.55) |
| Profit Before Tax (PBT) | 184.20 | 326.43 | 394.08 | 429.69 |
| Taxes | 54.34 | 71.31 | 72.37 | 92.61 |
| Profit After Tax (PAT) | 129.86 | 255.12 | 321.71 | 337.07 |

FINANCIAL OVERVIEW



(Rs. In Crores)

| Financial Result (Consolidated) | FY 2013 | FY 2014 | FY 2015 | FY 2016 |
|----------------------------------|----------|----------|----------|----------|
| Fixed Assets (Incl. CWIP) | 457.75 | 577.01 | 753.30 | 875.30 |
| Current Assets, Loans & Advance | 1,522.13 | 2,091.59 | 2,286.97 | 2,098.55 |
| Gross Capital Employed | 1,979.88 | 2,668.60 | 3,040.27 | 2,973.85 |
| Current Liabilities & Provisions | 326.96 | 336.95 | 443.79 | 287.51 |
| Capital Employed | 1,652.92 | 2,331.65 | 2,596.48 | 2,686.34 |
| Share Capital | 24.24 | 23.58 | 23.54 | 23.54 |
| Reserves & Surplus | 806.11 | 1,021.27 | 1,301.23 | 1,600.18 |
| Share Holders Funds | 830.35 | 1,044.85 | 1,324.77 | 1,623.72 |
| Book Value (Rs.) | 34.26 | 44.31 | 56.28 | 68.98 |
| Long Term Loans | 77.45 | 204.38 | 236.28 | 200.63 |
| Working Capital Loans | 758.12 | 1,111.17 | 1,045.16 | 891.39 |
| ROCE (%) | 16.48 | 18.26 | 19.50 | 19.58 |
| Return on Equity (%) | 16.97 | 27.81 | 27.64 | 23.16 |
| No. of Share (in crore) | 24.24 | 23.58 | 23.54 | 23.54 |
| Earning Per Share (Rs.) | 5.36 | 10.84 | 13.67 | 14.33 |
| Cash EPS (Rs.) | 7.44 | 13.29 | 15.91 | 16.45 |

FINANCIAL OVERVIEW



Key Performance Indicators (For Quarter Ended September 2016)

Consolidated:-

- ❖ The Company achieved total revenue of Rs.735.16 crores in this quarter as compared to Rs. 920.16 crores same quarter last year.
- ❖ Company achieved EBIDTA of Rs.153.06 crores in this quarter as compared to Rs.140.18 crores same quarter last year. EBIDTA margin increased from 15.26% to 21.41%.
- ❖ Company earned Profit Before Tax (PBT) of Rs.124.90 crores as compared to Rs.116.91 crores same period last year. PBT Margin increase from 12.72% to 17.42%.
- ❖ Company earned Profit After Tax (PAT) of Rs. 98.41 crores as compared to Rs. 86.49 crores same period last year. PBT Margin increase from 9.40% to 13.76%.
- ❖ Earning Per Share (EPS) for the quarter ended September 2016 at Rs. 4.18 per share as compared to Rs. 3.68 per share same period last year.



FINANCIAL OVERVIEW



Key Performance Indicators (For Half Year Ended September 2016)

Consolidated:-

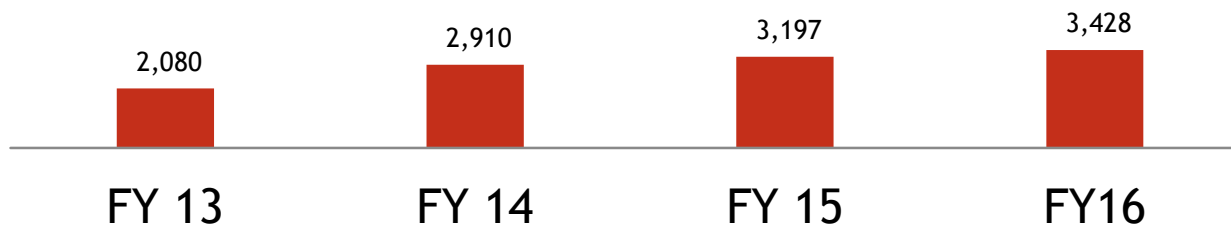
- ❖ The Company achieved Top Line of Rs.1,537.87 crores in the first half this year as compared to Rs. 1,918.25 crores same period previous year. We sold total of 262058 MT of rice during the period as against 328130 MT in the same period last year. The volume and value of exports during the quarter was lower due to fact that last year we executed a major export of 95000 MT tender sale to Iraq Government during this period and there was no such export in the current period.
- ❖ However due our brand strength and higher price realization in exports we achieved Company achieved EBITDA of Rs.293.91 crores as compared to Rs. 282.64 crores same period last year.
- ❖ Profit Before Tax (PBT) at Rs. 228.29 crores as compared to Rs. 220.95 crores same period last year.
- ❖ Profit After Tax (PAT) at Rs.178.81 crore as compared to Rs. 159.53 crore same period last year. There is an increase of 12.09% and PAT margin increased by 40% during the period which stands at 11.63% as against 8.32% in the same period last year.
- ❖ Earning Per Share (EPS) for the first half year ended September 2016 at Rs. 7.60 per share as compared to Rs. 6.80 per share same period last year.
- ❖ Book value stands on 30-9-2016 at Rs. 70.71 per share as compared to Rs. 58.70 per share same period last year.



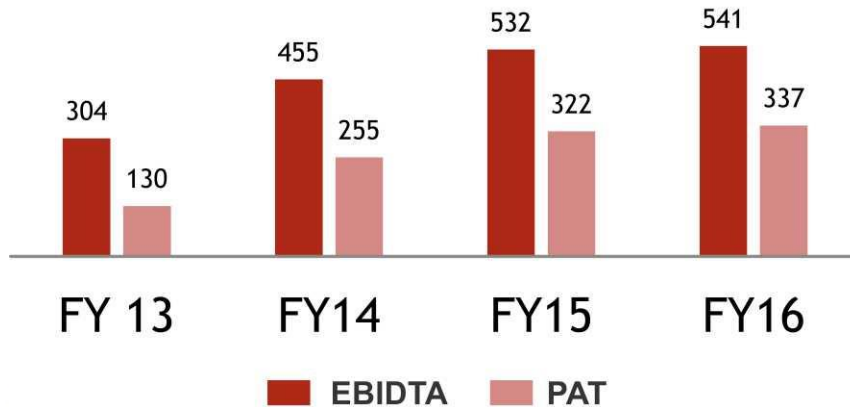
FINANCIAL OVERVIEW

Revenue Growth and Margin Trends

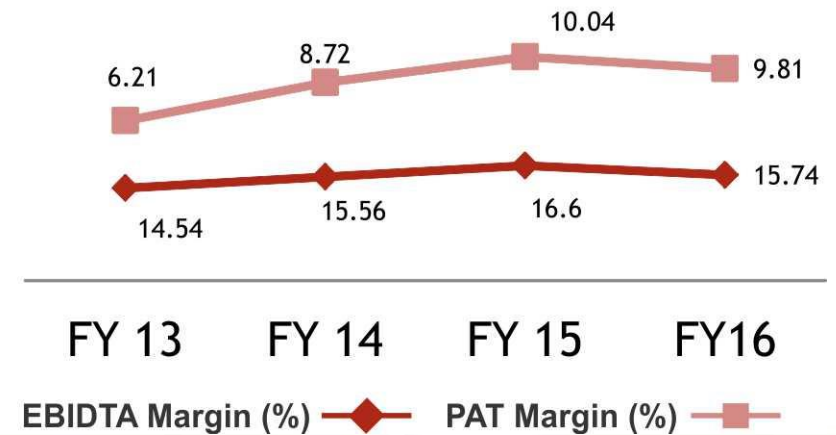
Operating Revenue (Rs. In Crores)



EBIDTA & PAT (₹ In Crores)

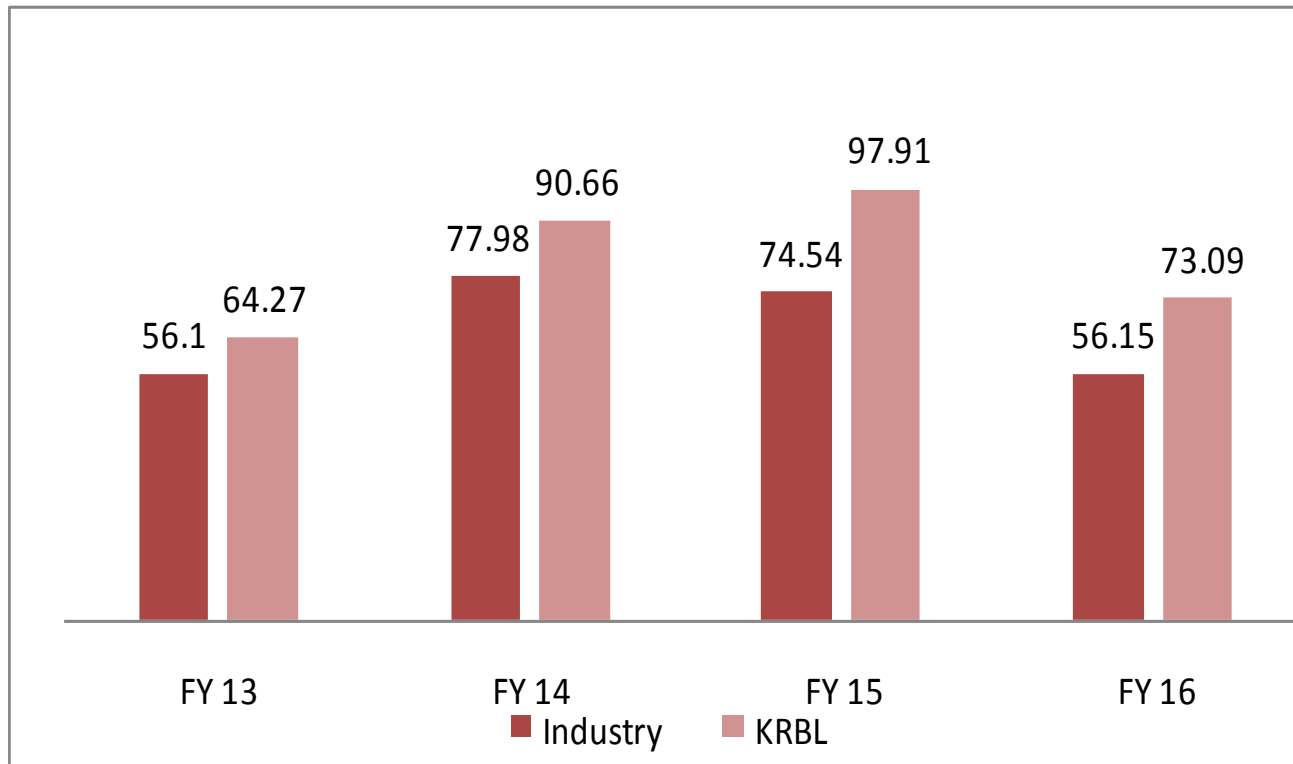


EBIDTA & PAT Margin (%)



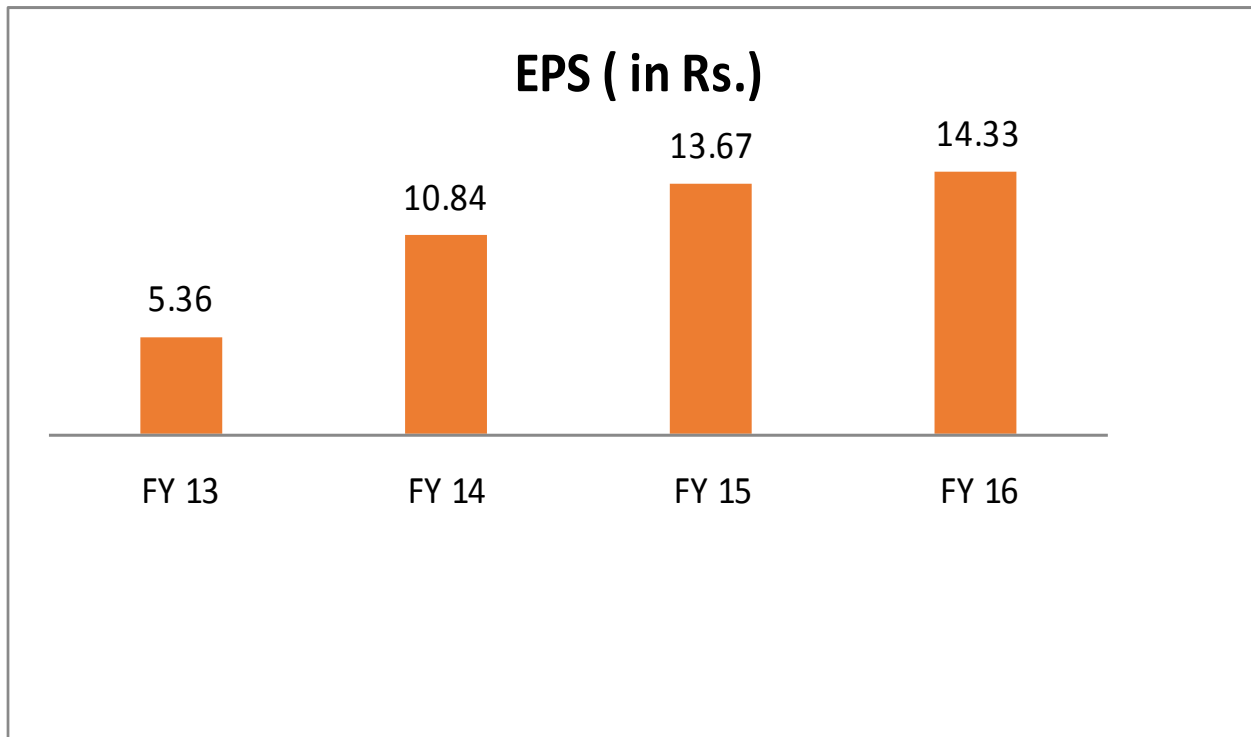
FINANCIAL OVERVIEW

Unit Export Value Realization (Rs./Kg)



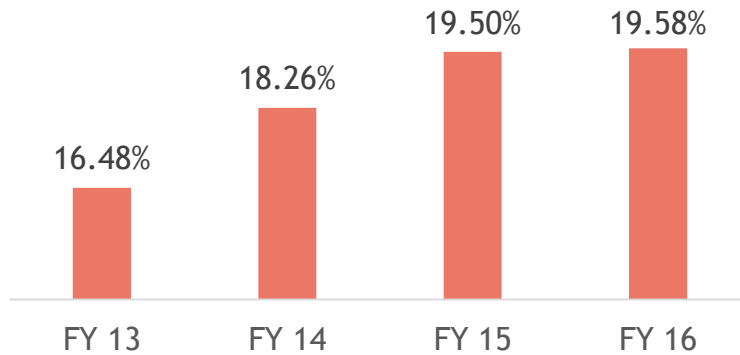
FINANCIAL OVERVIEW

Achieved Strong EPS Growth

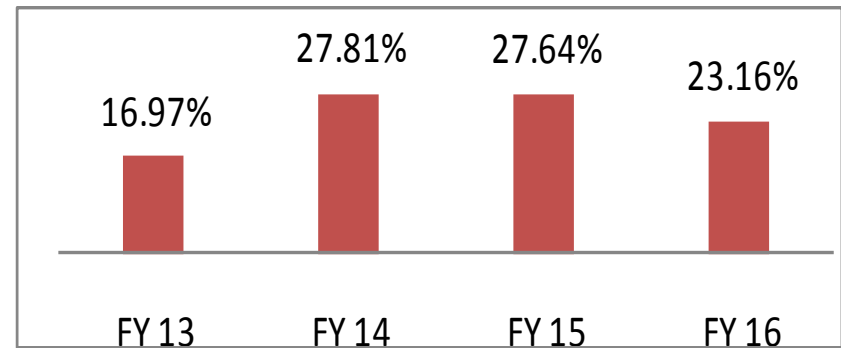


FINANCIAL OVERVIEW

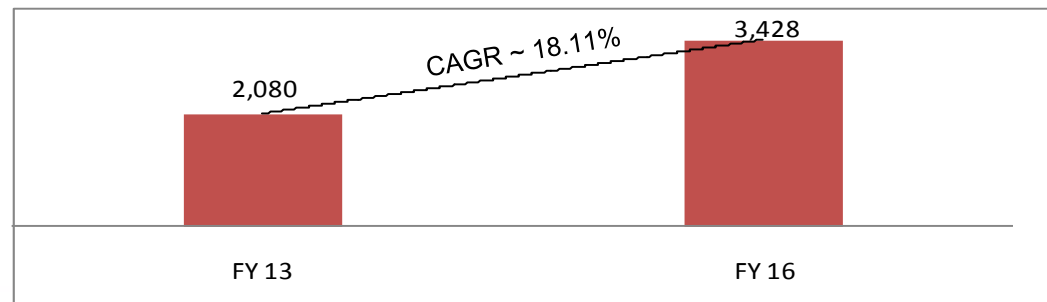
Return on Capital Employed



Return on Equity

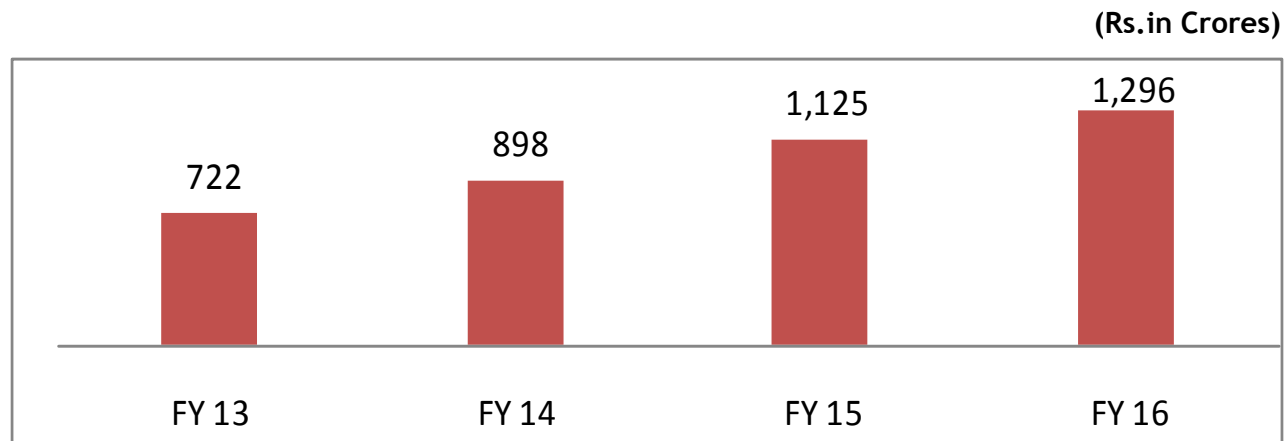


Growth of the Company



FINANCIAL OVERVIEW

Gross Fixed Assets Growth



- ❖ Asset utilization to improve with higher capacity utilization
 - ❖ Dhuri Plant expected to be at 70% utilization level by FY17, leading to improved EBIDTA margin
 - ❖ UP plant at 100% utilization level
- ❖ Low debt gearing at 0.71x in FY 2016
- ❖ ROE at 23.16% in FY16
- ❖ Strong Inventory build-up enabling extended storage period and hence enhanced margins. Very good inventory gains as company is carrying low-cost inventory in books
- ❖ Inventory stood at Rs.1,744 crores in FY 2016

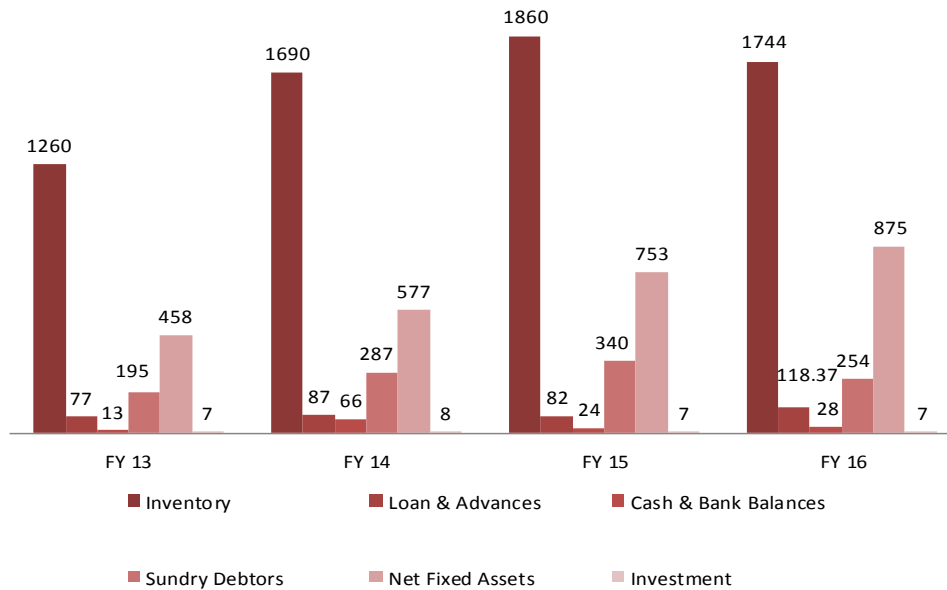
FINANCIAL OVERVIEW



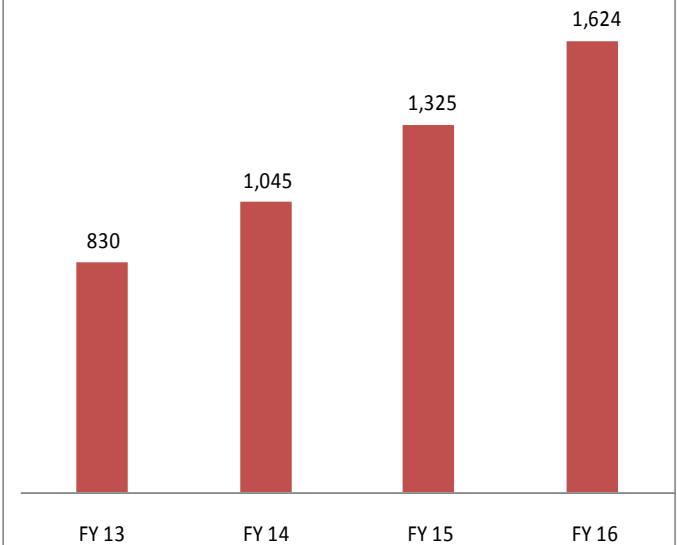
Balance Sheet Strength

(Rs. In Crores)

Asset Buildup



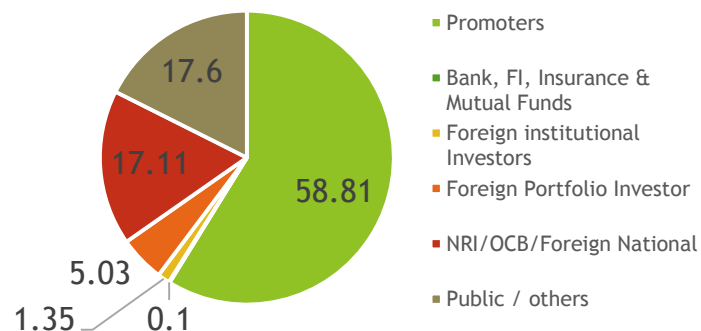
Net Worth



FINANCIAL OVERVIEW



Shareholding Pattern



Shareholding Pattern on 30-9-2016

Shareholding Information as on 30-9-2016

Market Data (as on 16-11-2016)

| | |
|---------------------------------------|---------------|
| Market Cap (Rs. in Crores) | 5738.81 |
| Share Price (Rs.) | 243.80 |
| Book Value Per Share (Rs) (30.9.2016) | 70.71 |
| 52 Week High / Low (Rs.) | 306.30/174.50 |
| Outstanding Shares (Crores) | 23.54 |
| BSE Ticker | 530813 |
| NSE Ticker | KRBL Market |

| Institutional/Bodies Shareholders Holding | % |
|--|------|
| Reliance Commodities DMCC | 9.73 |
| Kotak Mahindra (International) Ltd | 2.45 |
| Premier Investment Fund Limited | 0.55 |
| Quant Foreign Value Small Cap Fund | 0.52 |
| Vanguard Total International Stock Index Fund, A | 0.48 |

FINANCIAL OVERVIEW



Company Analysis

(Rs. In Million)

| | 2016 | 2015 | 2014 | 2013 | 2012 | 2011 | CAGR 5y |
|--------------|--------|--------|--------|--------|--------|--------|---------|
| Total Income | 34,281 | 31,597 | 29,105 | 20,804 | 16,310 | 15,513 | 17% |
| PBIDT | 5,406 | 5,318 | 4,551 | 3,041 | 2,373 | 2,416 | 17% |
| PAT | 3,370 | 3,217 | 2,551 | 1,298 | 730 | 1,203 | 23% |
| Cash Profit | 3,871 | 3,744 | 3,120 | 1,804 | 1,175 | 1,562 | 20% |
| RoE % | 23 | 27 | 27 | 17 | 11 | 20 | |

- ❖ Robust growth over 5 year periods
- ❖ PAT CAGR of 23% - consistent across long periods
 - ❖ Higher growth expected in future due to consolidation in industry
 - ❖ Branding and pricing power
 - ❖ Consumerization
 - ❖ New launches and product segmentation strategy
- ❖ Long term AVERAGE RoE of 22%
- ❖ Current year RoE increasing > 27%— due to branding and consumerization.



HIGHLIGHTS OF EXPORT MARKET



India Gate #1 Indian Basmati brand in Kuwait. **21%** market share

12% export share of the largest market of Basmati in the world – Saudi Arabia. India Gate Classic is the most **aspirational brand** in **Saudi Arabia**

India Gate #1 Indian Basmati brand in UAE. **30%** market share

India Gate #1 Indian Basmati brand in Qatar

India Gate is #1 Indian Basmati brand in Oman

India Gate #1 Indian Basmati brand in Bahrain

(Source: Retail Data, Distributors Data, APEDA Data & KRBL Export Data)



HIGHLIGHTS OF EXPORT MARKET



India Gate #1 Indian basmati brand in Lebanon. Has **30%** market share of Modern Trade.

Dominance in the Australasia region. **India Gate # 1 brand** in Australia and New Zealand

India Gate #1 Indian Basmati brand in Canada both in Modern and Ethnic market

KRBL brands have market share ranging **45%-15%** in African markets

India Gate is the most aspirational brand in Singapore and Hong Kong

India Gate Classic most aspirational brand in Scandinavia

(Source: Retail Data, Distributors Data, APEDA Data & KRBL Export Data)

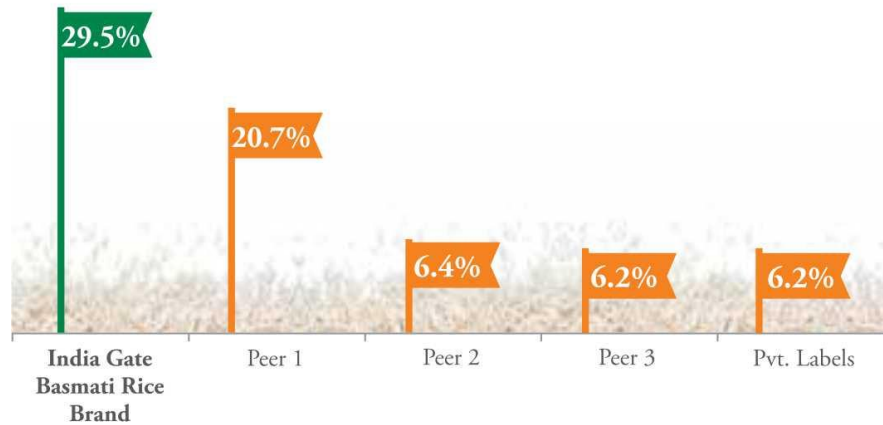
HIGHLIGHTS OF DOMESTIC MARKET



Geography-Wise Market Share:

Top 5 Brands (Value Wise): (In %)

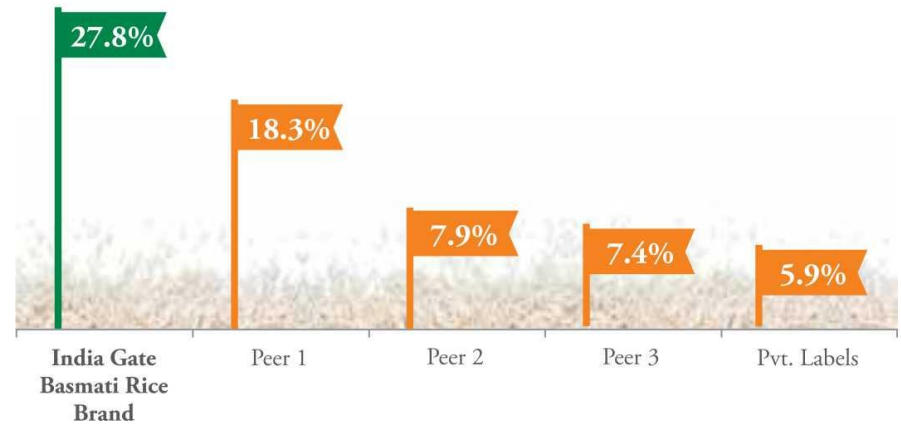
Highest All India Urban Plus Rural Market Share of KRBL Limited



In value terms, India Gate Basmati Rice brand enjoys a leading position in the Indian urban and rural areas combined with a 29.5% market share.

Top 5 Brands (% Share in Metro Market) (Value Wise): (In %)

Highest All India Metros Market Share of KRBL Limited



In value terms, India Gate Basmati Rice is a dominant brand in Indian Metropolitan area with a 27.8% market share.

(Source: AC Nielsen MAT March 2016 data)



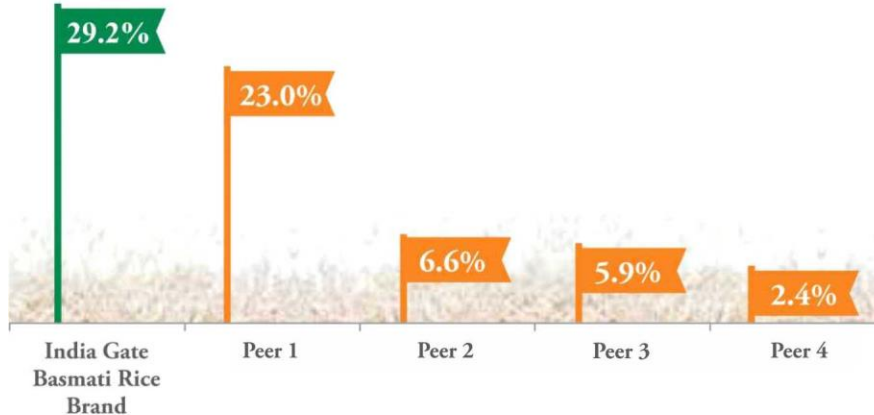
HIGHLIGHTS OF DOMESTIC MARKET



Market Channel-Wise:

Top 5 Brands (% Share in Traditional Trade) (Value Wise): (In %)

Highest All India Traditional Trade Market Share of KRBL Limited



In value terms, India Gate Basmati Rice is a leading brand dominating the all India traditional trade with a 29.2% market share.

Top 5 Brands (% Share in Modern Trade) (Value Wise): (In %)

Highest All India Modern Trade Market Share of KRBL Limited



In value terms, India Gate Basmati Rice is a leading brand dominating the all India modern trade with a 29.9% market share.

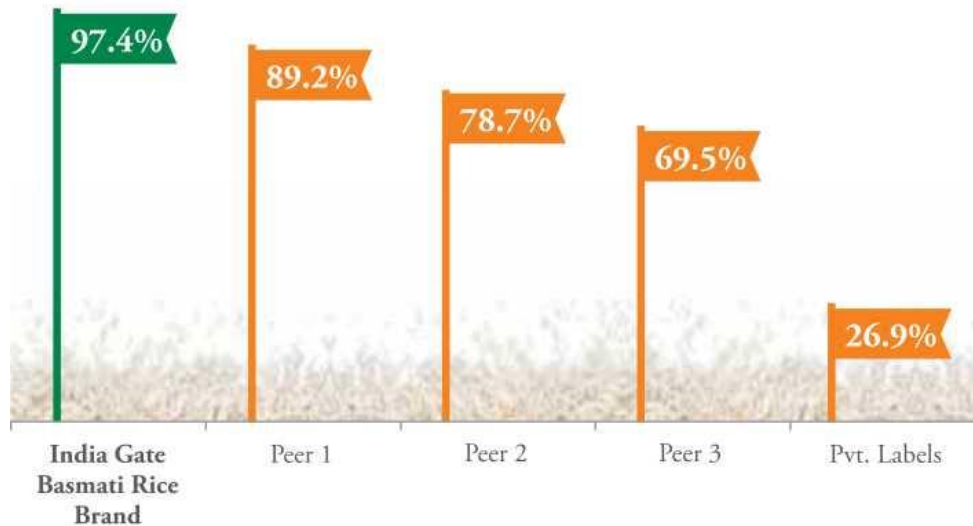
(Source: AC Nielsen MAT March 2016 data)

HIGHLIGHTS OF DOMESTIC MARKET



Top 5 Brands Weighted Value Distribution in packaged Basmati Rice category in modern trade (%)

Highest All India Weighted Value Distribution in Packaged Basmati Rice Category in Modern Trade (%)



In terms of Weighted Value Distribution (percentage of stores that sell our products based on their weighted importance), 97.4% of the modern trade stores sell our packaged Basmati Rice products.

(Source: AC Nielsen MAT March 2016 data)



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