



October 28, 2024

To,
Listing/ Compliance Department
BSE LTD.
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai - 400 001

SCRIP CODE: 543748

To,
Listing/ Compliance Department
**National Stock Exchange of
India Limited**
"Exchange Plaza", Plot No. C/1,
G Block, Bandra Kurla Complex,
Bandra (E), Mumbai – 400 051
SYMBOL: AARTIPHARM

Dear Sir/Madam,

Sub: Results Presentation
Ref: Regulation 30 of the SEBI (LODR)
Regulations 2015

Please find enclosed herewith the Q2/H1 FY25 Results Presentation of the Company for your records.

The same is also being uploaded on Company's website <https://www.aartipharmalabs.com/presentation>

Please take the same on your records.

Thanking you,

Yours faithfully,
For AARTI PHARMALABS LIMITED

NIKHIL NATU
COMPANY SECRETARY
ICSI M. NO. A27738

Encl. a/a.

AARTI PHARMALABS LIMITED

www.aartipharmalabs.com | CIN : L24100GJ2019PLC110964 | Email : info@artipharmalabs.com


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Regd. Office : Plot No. 22-C/1 & 22-C/2, 1st Phase, G.I.D.C., Vapi 396 195, District - Valsad, Gujarat, INDIA, T : +91 260 2400467, +91 99099 94655



INVESTOR PRESENTATION


October 2024

SNAPSHOT



200+ Products

56 Patents Filed



500+ Global Clients

50+ Export Countries



3 State-of-the-art R&D facility



6 Manufacturing Units

3 USFDA Units



2100+ Employees



42 US DMF

23 CEP



15-20% Global Market Share in Xanthine



0.18x Net Debt/Equity



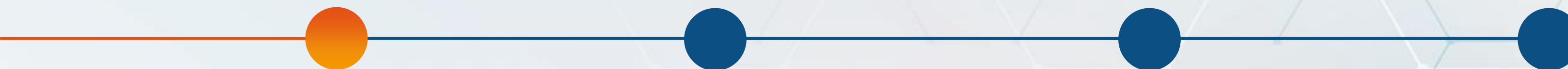
A+ Credit rating

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COMPANY OVERVIEW

- Aarti Pharmalabs Limited (APL) formerly known as Aarti Organics was established in 1984 as a wholly owned subsidiary of renowned Aarti Industries Limited. Got demerged in October 2022 into a separately listed entity (effective July 2021)
- Part of the Aarti group – a diversified chemical conglomerate with turnover of INR 134 bn (FY23)
- Established, internationally recognized manufacturer of generic Active Pharmaceutical Ingredients (API), Xanthine derivatives and offers CDMO/CMO services.
- Received accreditation from several agencies, including USFDA, EU GMP, EDQM (European Pharmacopoeia), KFDA (Korea), and COFEPRIS (Mexico).
- Over the years, demonstrated strong expertise in development of robust & cost-effective process for rapid scale up and commercial production.
- Focused on backward integration of intermediates for a majority of the API's that it manufactures.
- Strategically located: In western India with proximity to ports
- Preferred partner for beverages, nutraceuticals, and pharmaceutical industries globally.

HIGHLIGHTS



One of the leading small molecule CDMO/CMO company in India.

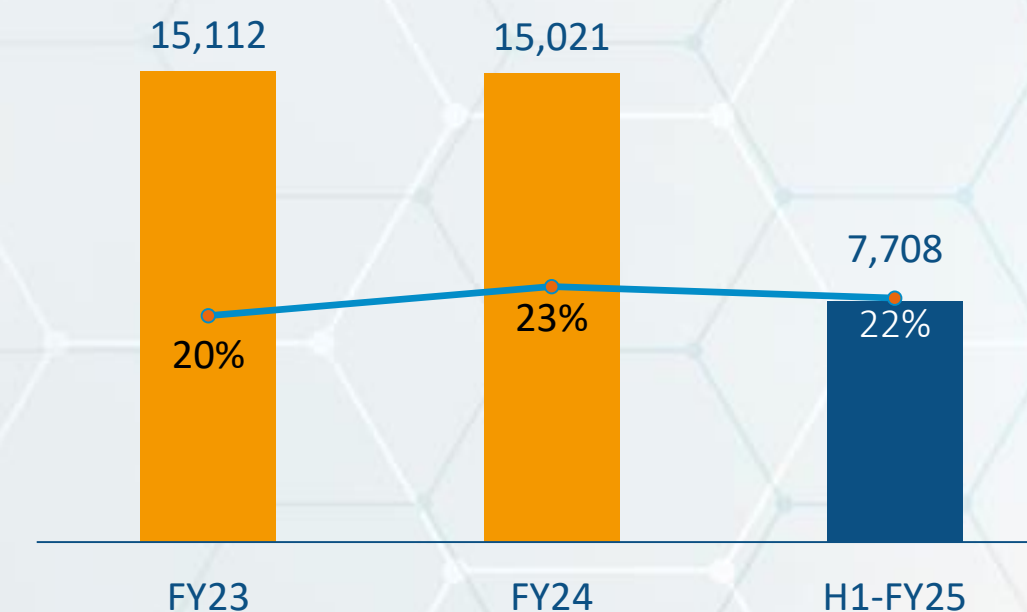


Regulatory focussed operations with expertise in novel chemistries;

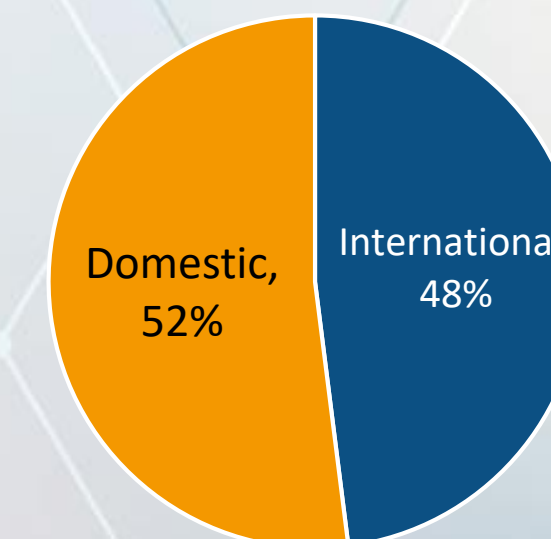


Largest manufacturer of Xanthine Derivatives in India

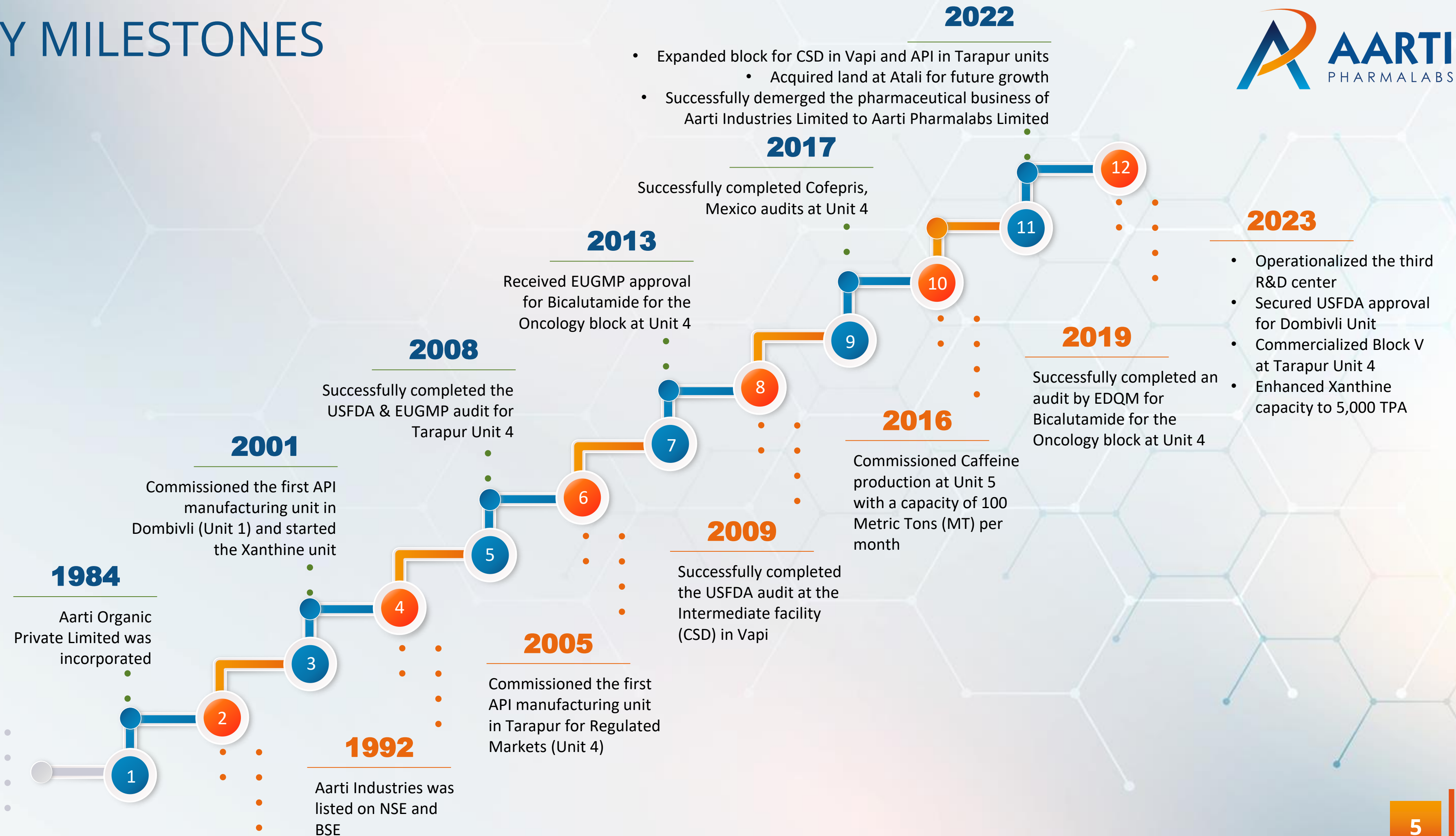
STANDLAONE REVENUE (INR Mn) & EBITDA MARGINS (%)



GEOGRAPHICAL SALES (H1-FY25)



KEY MILESTONES



BOARD OF DIRECTORS



Shri Rashesh C. Gogri
Chairman

Shri Rashesh Gogri was appointed as the Chairman of the company in 2022. A production engineer from Mumbai University, he has played a key role in the growth of various strategic business units in the chemical, pharma, and personal care segments.



Smt. Hetal Gogri Gala
Vice Chairperson & MD

Graduate in electronics engineering from Mumbai University, Smt. Hetal Gogri Gala is the Vice Chairperson & Managing Director of the company since 2022. She has completed MEP from IIM-Ahmedabad. With rich experience in procurement & marketing functions, she oversees the commercial domain at the company



Shri Narendra Salvi
Managing Director

Shri Narendra Salvi is vastly experienced in the chemicals and pharma industry with an experience spanning over three decades. He is presently helping the quality system and projects and operations of the company.



Shri Rajendra V. Gogri
Non-Executive Director

Shri Rajendra V. Gogri has been associated with the company since its inception. A rank holder from UDCT, Mumbai, he possesses a master's degree in chemical engineering from the USA. He possesses a keen understanding of the financial and commercial aspects of the business



Shri Parimal H. Desai
Non-Executive Director

A chemical engineer from UDCT, Mumbai, Shri Parimal H. Desai has more than 34 years of experience in development and project implementation in the chemical and pharma industry.



Smt Nehal Garewal
Non-Executive Director

With 30+ years of work experience, Smt Nehal Garewal has worked in Pharma, Social & Education sector, security safety and risk management industries - gaining extensive knowledge of commercial strategy, planning, execution and innovation.



Prof. Vilas Gaikar
Independent Director

Prof. Vilas Gaikar holds a Ph.D. degree in Chemical Engineering from Institute of Chemical Technology (ICT). He is a recipient of numerous awards and has published more than 190 publications in referred International Journals.



Shri Bhavesh Vora
Independent Director

Shri Bhavesh Vora is a practicing Chartered Accountant, with more than 24 years of experience in the field of stock brokers' audits, compliances, derivatives, futures and options, accounting standards and internal management audit.



Shri Vinay Nayak
Independent Director

A pharmaceutical professional, Shri Vinay Nayak has worked with organizations such as Cipla, Lupin, Watson, Marksans, Alembic and Emcure pharmaceuticals for 32+ years. He specializes in the areas of manufacturing, quality, R&D, compliance and regulatory affairs, for API & formulation manufacturing.



Smt. Jeenal Savla
Independent Director

Smt. Jeenal Savla is a Chartered Accountant by qualification and has 14 plus years of experience in the areas of Internal Audit and Risk Management.



Smt. Rupal Vora
Independent Director

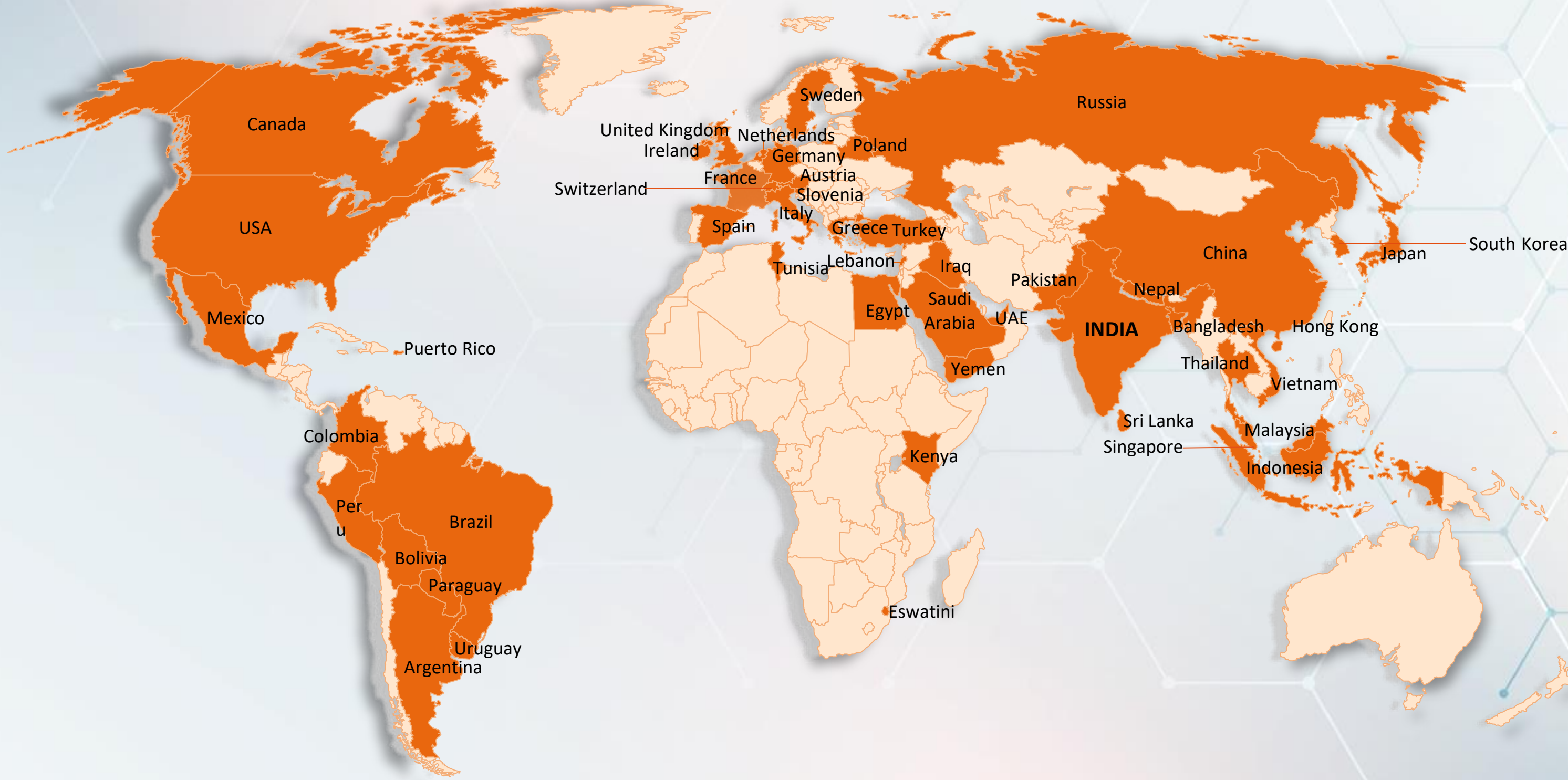
Smt. Rupal Vora is a Commerce and Law graduate from Government College, Mumbai University. She is a practicing advocate with 30+ years of experience and having specialization in direct taxation



Shri Pradeep Thakur
Independent Director

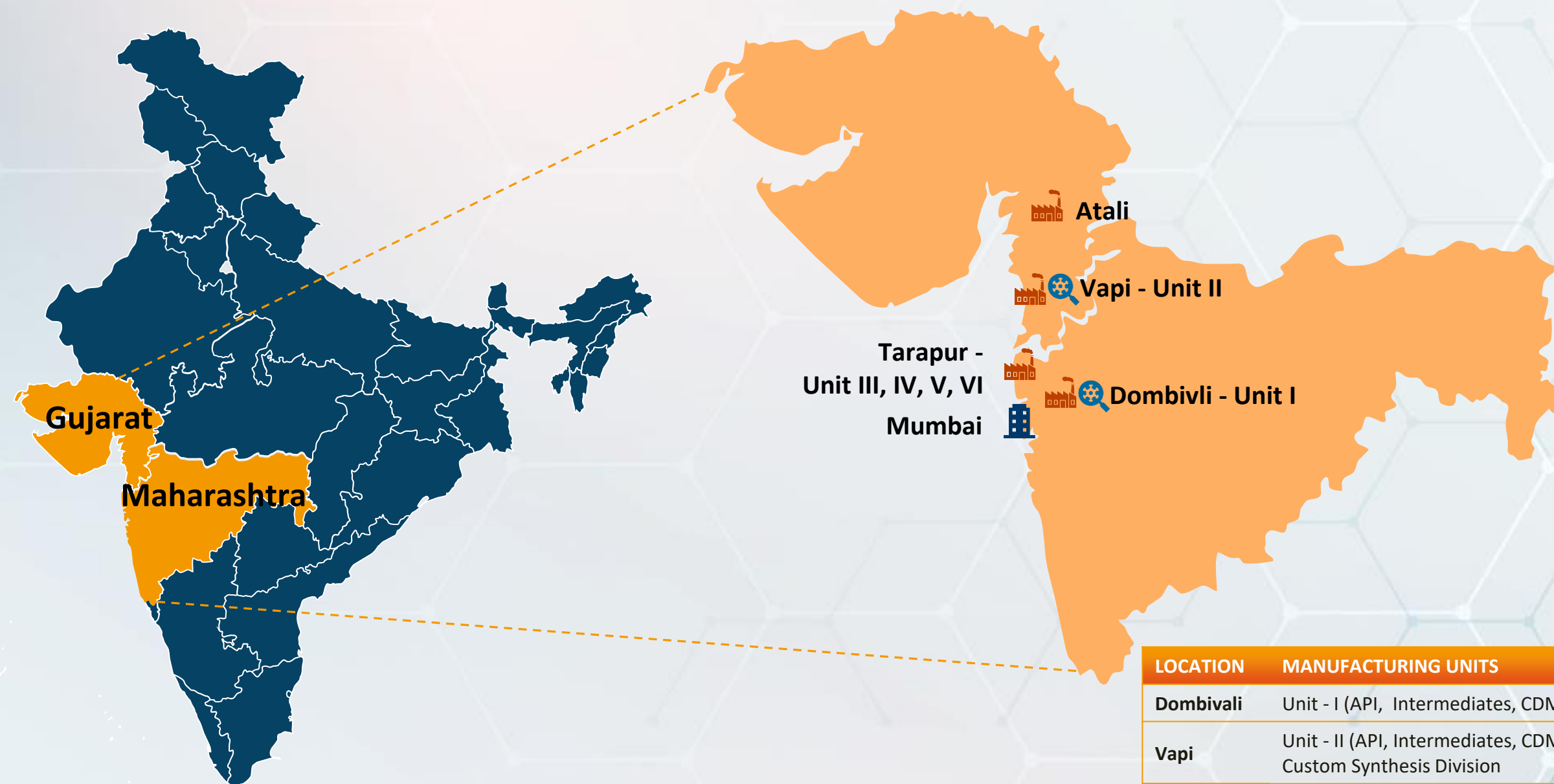
Shri Pradeep Thakur is a post-graduate in chemistry from Mumbai University. In 30+ years of experience with firms like Cipla, Dr Reddy, Bayer India, Aceto Pharma, he has extensively worked in areas of process development, quality control, business development etc

GEOGRAPHICAL PRESENCE



 Countries Exporting To

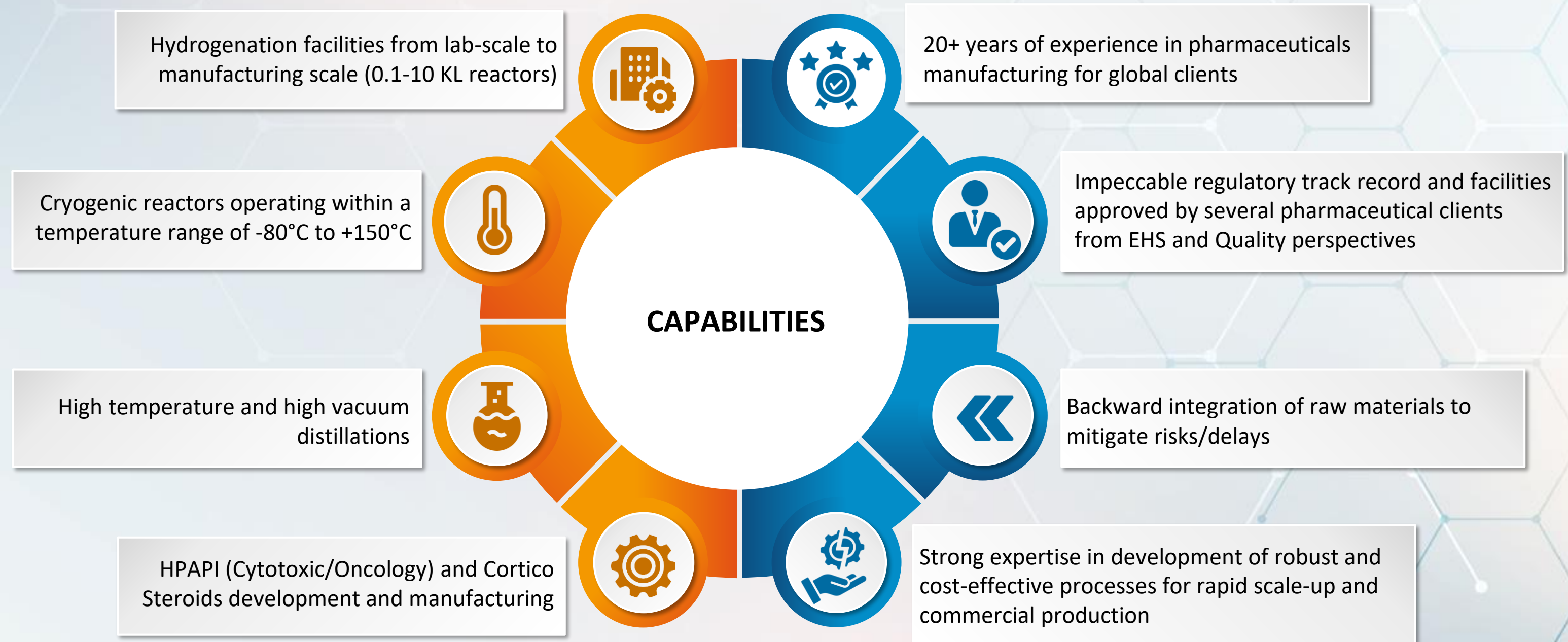
MANUFACTURING PRESENCE



-  HEAD OFFICE
-  R&D CENTER
-  MANUFACTURING UNIT

LOCATION	MANUFACTURING UNITS	CERTIFICATIONS & AUDIT DATE
Dombivli	Unit - I (API, Intermediates, CDMO)	USFDA - Jun 2022
Vapi	Unit - II (API, Intermediates, CDMO) Custom Synthesis Division	USFDA - Sep 2009, Aug 2017
	Unit - III (Xanthine Unit)	
Tarapur	Unit - IV (API, CDMO-API)	USFDA - Mar 2008, Sep 2011, Mar 2015, Dec 2016, Feb 2020 EUGMP - Apr 2008, May 2012, Aug 2013, Jan 2015 EDQM - Sep 2019, KFDA - Nov 2017, COFEPRIS - Apr 2017, May 2017
	Unit - V (Xanthine Unit)	
	Unit - VI (Intermediate unit of Xanthine, speciality & allied products)	
Atali	New unit under construction ((CDMO, Intermediates)	

END TO END CAPABILITIES UNDER ONE UMBRELLA



TECHNICAL CAPABILITIES

MANUFACTURING CAPABILITIES

RESEARCH & DEVELOPMENT

3

State of the art
R&D Centers at
Maharashtra & Gujarat

150+

Process for more than 150
intermediates developed
and manufactured on kilo-
lab scale

100+

New products to be
developed in next few
years

6%

R&D Spend (as a
percent of API &
CMDO sales) in FY 24

7

PhDs

70+

Scientists

43 Cr

R&D
Spend in FY24

50+

APIs commercialized

56

Process Patents Filed

27

Patents Granted



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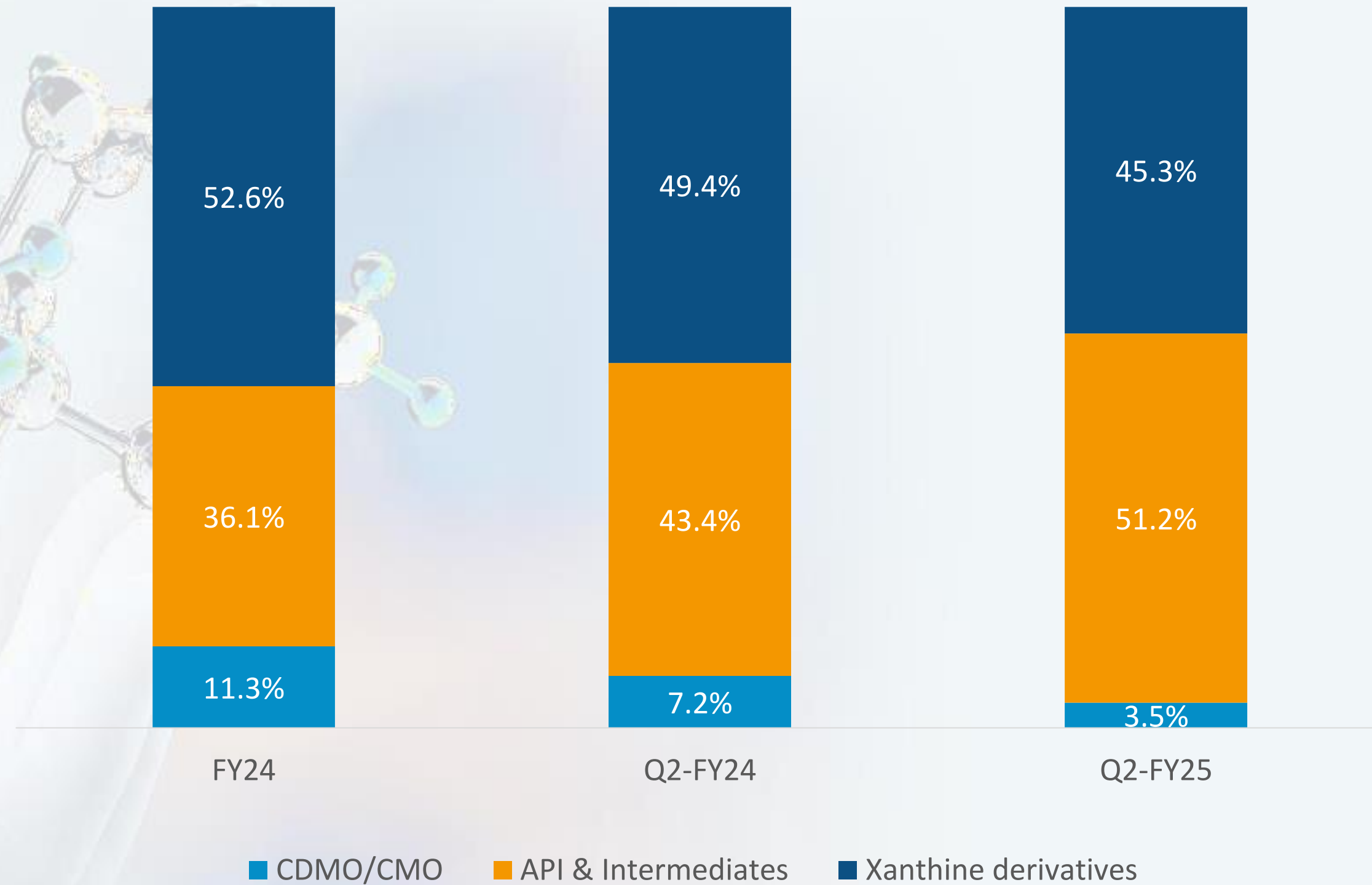
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KEY BUSINESS SEGMENTS

- Xanthine Derivatives & Allied Products
- API & Intermediates
- CDMO/CMO

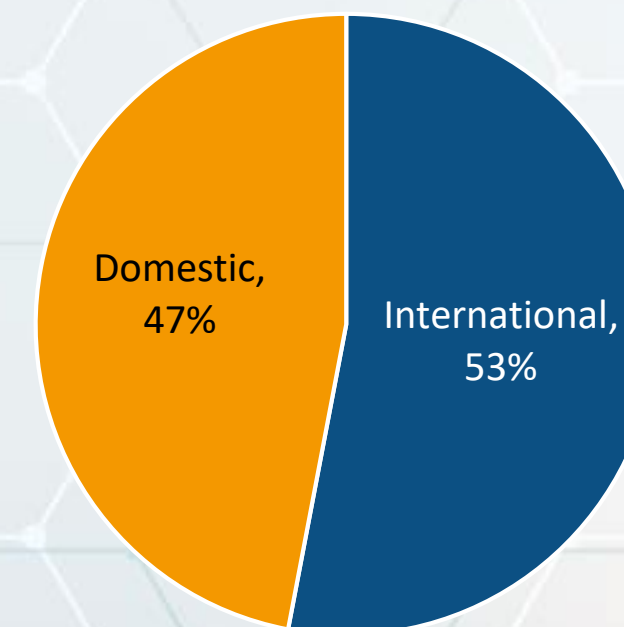
QUARTERLY REVENUE BREAK-UP



XANTHINE DERIVATIVES & ALLIED PRODUCTS

- Aarti Pharmalabs is the largest Indian manufacturer of Xanthine Derivatives, including Caffeine, Theophylline Anhydrous, Aminophylline, Etophylline, and Theophylline that find applications in beverages, nutraceuticals, and pharmaceutical industries.
- Largest manufacturing capacity in India for the flagship product 'caffeine'.
- Non-Chinese dependent and an integrated manufacturer of Xanthine derivatives, positioning them advantageously amidst trends like "China + 1" strategy.
- Xanthine derivatives are frequently used as mild stimulants and bronchodilators, particularly in managing symptoms associated with Asthma or Influenza.
- Operates two dedicated plants with a combined capacity of about 5,000 MTPA for producing Xanthine Derivatives.
- With a global market share of 15-20%, APL holds a significant presence in the global Xanthine industry.

GEOGRAPHICAL SALES SPLIT (H1-FY25)



END USE



Cola Drinks



Energy Drinks

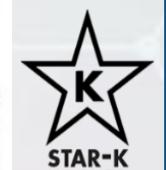


Pharmaceutical



Nutraceutical

CERTIFICATIONS



API & INTERMEDIATES

- Aarti Pharmed Labs specializes in the development and manufacturing of Highly Potent Active Pharmaceutical Ingredients (HPAPIs), catering to the demand for critical drugs used in oncology, corticosteroids, and cytotoxic medicines.
- Backward integrated for most Active Pharmaceutical Ingredients (APIs), giving them control over the entire production value chain and ensuring high-quality intermediates.
- Operates USFDA approved manufacturing facilities, ensuring stringent compliance and quality standards.
- Enjoys a distinct advantage over competition in having dedicated US, EU, and Japan approvals in place.
- One of the preferred partners in regulated markets led by robust regulatory documentation and IPR support required for such markets.

KEY HIGHLIGHTS

54

APIs Commercialized by APL since it entered the pharma business in year 2000

12

New APIs are under development at API dedicated R&D facility/validation for pharmaceuticals

42

US DMF Approvals obtained across multiple therapeutic areas for APIs & intermediates

23

CEP Approvals available for sale in European Union across multiple therapeutic areas

140+

Generic Intermediates are available at R&D, Pilot And Commercial Scales

THERAPEUTIC SEGMENT



CARDIOVASCULAR



ANTI ASTHAMATIC



ANTI CANCER



ONCOLOGY



ANTI DIABETIC



CNS AGENT



SKIN CARE



OVERACTIVE BLADDER



CALCIMIMETIC



DECONGESTANT

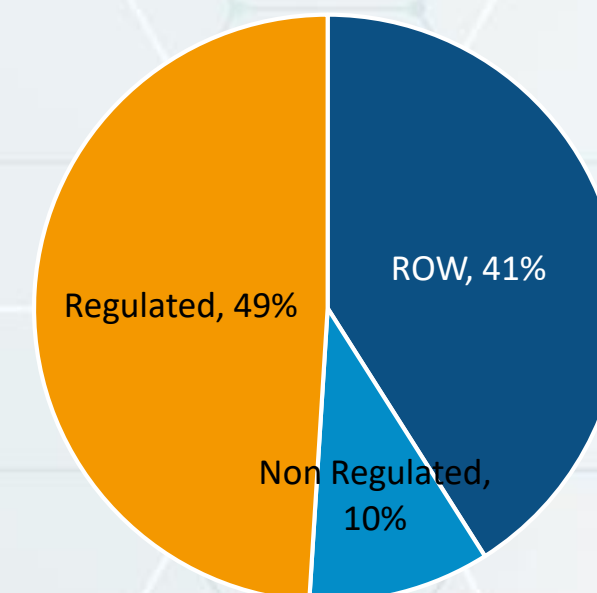


ANTI THALASSAEMIC

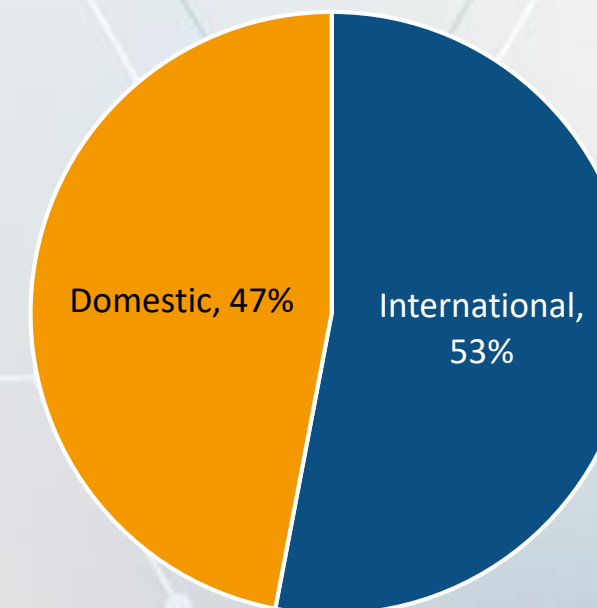


ANALGESIC

MARKET SEGMENTATION (H1-FY25)



GEOGRAPHICAL SALES SPLIT (H1-FY25)



CDMO & CMO

- Aarti Pharmalabs is one of the leading small molecule Contract Development and Manufacturing Organization (CDMO/CMO) in India.
- Offers services for drug substance projects including NCEs, APIs, RSMs, and Intermediates to global innovative pharmaceutical and biotech companies, Currently working with 16 innovator and big Pharma companies.
- Provides end-to-end services for small molecule NCEs drug development programs from lab scales to pilot and manufacturing scales focusing on clinical phases(Ph-I/II/III), launch, and commercial phase projects.
- CRAMS activity is primarily centered around the research and manufacturing services for active pharmaceutical ingredients (APIs) and intermediates with stringent intellectual property protection on the services offered.
- Dedicated R&D and pilot facilities focusing on CDMO. Presently working with 19 customers on 55 projects, of which 28 are in the commercial stage and 27 are under different stages of development, both at customer's end.



SERVICES OFFERED



End-to-end solutions from synthetic route design to commercial manufacturing, specializing in HPAPIs, cryogenic reaction & hydrogenation



Comprehensive services like
1) Robust process development (DoE & QbD studies)
2) Process validation and
3) Analytical method development & validation



Drug substance manufacturing for Pre-Clinical, Clinical, Launch & Commercial manufacturing



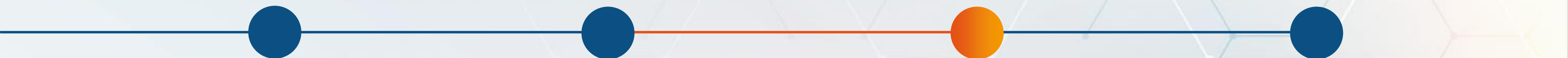
Strong CMC documentation expertise to ensure smooth regulatory approvals.

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GROWTH DRIVERS




FUTURE OUTLOOK



Fortify market leading position in the Xanthine segment by brownfield capacity expansion



Plan to strengthen API and CDMO segment by introducing more value-added products and acquiring new customers



Expect EBITDA growth of approximately 10-12% in FY25



Aim to achieve long-term goal of about 15% annual growth in the next 3 years



ENVIRONMENT

- ISO 14001 : 2015 certification
- All plants are Zero Liquid Discharge (ZLD)
- ~50% of total water consumed is recycled
- Green chemistry principles incorporated during product development stage
- Recycle & reuse of solvents and safe disposal of Hazardous waste
- Initiated GHG accounting following the GHG Protocol across all three scopes
- Installing a solar-based electricity generation plant, to further minimize our carbon footprint

- Hazard Identification and Risk Assessment (HIRA), Hazardous Area Classification (HAC) and work permit system in place
- Safety Trainings - Induction, On the job, Classroom, Demos
- Incident management - “Safety Alert”, Learning from Incidents, Root cause analysis and Global CAPA Implementation
- Industrial Hygiene study conducted
- Strengthened HR policies and procedures - considering UN Global Compact, International Labor Organization's (ILO) Declaration and Sexual Harassment of Women at Workplace Act, 2013 etc.

SOCIAL



GOVERNANCE

- Robust Compliance Monitoring Framework - implemented PWC’s GRC tool to track & regularly monitor various governance aspects
- Internal monitoring and control systems for anti - corruption, bribery and anti - competitive practices
- Core Business Process digitized on a robust SAP ERP backbone
- Environment, Health, Safety & Quality processes digitized on Intellex Cloud platform
- Plan to release sustainability report for FY24 to showcase our integration of ESG principles in business & decision making

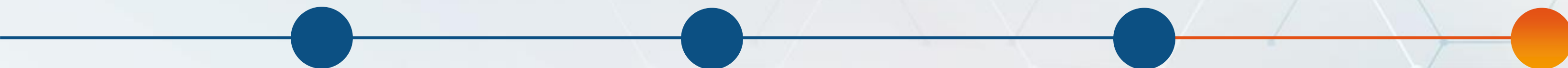


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QUARTERLY CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	Q2-FY25	Q1-FY25	Q-O-Q	Q2-FY24	Y-O-Y
Operational Revenue	4,580	5,555	(17.6)%	4,398	4.1%
Operating Expenses	3,643	4,590	(20.6)%	3,518	3.6%
EBITDA	937	965	(2.9)%	880	6.5%
EBITDA Margin (%)	20.46%	17.37%	309 Bps	20.01%	45 Bps
Depreciation and amortisation	209	202	3.5%	181	15.5%
Finance costs	55	48	14.6%	39	41.0%
Other Income	45	22	NA	10	NA
PBT	718	737	(2.6)%	669	7.3%
Tax Expense	172	182	(5.5)%	151	13.9%
PAT	546	555	(1.6)%	518	5.4%
PAT Margin (%)	11.92%	9.99%	193 Bps	11.78%	14 Bps
Other Comprehensive Income	(27)	4	NA	(37)	-27.0%
Total Comprehensive Income	519	559	(7.2)%	481	7.9%
Diluted EPS	6.02	6.12	(1.6)%	5.72	5.2%

HALF YEARLY CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	H1-FY25	H1-FY24	Y-O-Y
Operational Revenue	10,135	8,982	12.8%
Operating Expenses	8,234	7,253	13.5%
EBITDA	1,901	1,729	9.9%
EBITDA Margin (%)	18.76%	19.25%	49 Bps
Depreciation and amortisation	411	353	16.4%
Finance costs	103	81	27.2%
Other Income	67	15	NA
PBT	1,454	1,309	11.1%
Tax Expense	353	320	10.3%
PAT	1,101	989	11.3%
PAT Margin (%)	10.86%	11.01%	15 Bps
Other Comprehensive Income	(23)	2	NA
Total Comprehensive Income	1,078	990	8.9%
Diluted EPS	12.14	10.91	11.3%

HISTORICAL CONSOLIDATED INCOME STATEMENT



PARTICULARS (INR Mn)	FY23	FY24	H1-FY25
Operational Revenue	19,452	18,526	10,135
Total Expenses	16,031	14,666	8,234
EBITDA	3,421	3,860	1,901
<i>EBITDA Margins (%)</i>	17.59%	20.84%	18.76%
Other Income	23	49	67
Depreciation	625	732	411
Finance Cost	211	172	103
PBT	2,608	3,005	1,454
Tax	673	836	353
PAT	1,935	2,169	1,101
<i>PAT Margins (%)</i>	9.95%	11.71%	10.86%
Other Comprehensive Income	(35)	(4)	(23)
Total Comprehensive Income	1,900	2,165	1,078
Diluted EPS (INR)	21.35	23.93	12.14

QUARTERLY STANDALONE INCOME STATEMENT



PARTICULARS (INR Mn)	Q2-FY25	Q1-FY25	Q-O-Q	Q2-FY24	Y-O-Y
Operational Revenue	3,773	3,935	(4.1)%	3,561	6.0%
Operating Expenses	2,925	3,099	(5.6)%	2,823	3.6%
EBITDA	848	836	1.4%	738	14.9%
EBITDA Margin (%)	22.48%	21.25%	123 Bps	20.72%	176 Bps
Depreciation and amortisation	189	183	3.3%	163	16.0%
Finance costs	54	42	28.6%	38	42.1%
Other Income	29	21	38.1%	0	NA
PBT	634	632	0.3%	537	18.1%
Tax Expense	156	161	(3.1)%	119	31.1%
PAT	478	471	1.5%	418	14.4%
PAT Margin (%)	12.67%	11.97%	70 Bps	11.74%	93 Bps
Other Comprehensive Income	(11)	(2)	NA	(6)	83.3%
Total Comprehensive Income	467	469	(0.4)%	412	13.3%
Diluted EPS	5.27	5.20	1.3%	4.61	14.3%

HALF YEARLY STANDALONE INCOME STATEMENT



PARTICULARS (INR Mn)	H1-FY25	H1-FY24	Y-O-Y
Operational Revenue	7,708	7,143	7.9%
Operating Expenses	6,024	5,637	6.9%
EBITDA	1,684	1,503	12.0%
EBITDA Margin (%)	21.85%	21.08%	77 Bps
Depreciation and amortisation	372	318	17.0%
Finance costs	96	79	21.5%
Other Income	51	49	4.1%
PBT	1,267	1,158	9.4%
Tax Expense	317	264	20.1%
PAT	950	894	6.3%
PAT Margin (%)	12.32%	12.52%	20 Bps
Other Comprehensive Income	(14)	6	NA
Total Comprehensive Income	936	900	4.0%
Diluted EPS	10.47	9.87	6.1%

HISTORICAL STANDALONE INCOME STATEMENT

PARTICULARS (INR Mn)	FY23	FY24	H1-FY25
Operational Revenue	15,112	15,021	7,708
Total Expenses	12,028	11,560	6,024
EBITDA	3,084	3,461	1,684
<i>EBITDA Margins (%)</i>	20.41%	23.04%	21.85%
Other Income	13	110	372
Depreciation	558	660	96
Finance Cost	205	166	51
PBT	2,334	2,745	1,267
Tax	617	738	317
PAT	1,717	2,007	950
<i>PAT Margins (%)</i>	11.36%	13.36%	12.32%
Other Comprehensive Income	(7)	1	(14)
Total Comprehensive Income	1,710	2,008	936
Diluted EPS (INR)	18.95	22.14	10.47

HISTORICAL CONSOLIDATED BALANCE SHEET



ASSETS (INR Mn)	FY23	FY24	H1-FY25	EQUITY & LIABILITIES (INR Mn)	FY23	FY24	H1-FY25
Non-current assets				Equity share capital	453	453	453
Property, plant and equipment	9,227	9,942	10,944	Equity Share Capital Pending allotment	-		
Capital work-in-progress	622	785	1,160	Other equity	15,132	17,117	18,114
Right-to-use assets	11	205	179	Total Equity	15,585	17,570	18,567
Goodwill	18	18	18	Liabilities			
Other Intangible assets	2	169	267	Non-current liabilities			
Intangible assets under development	397	584	633	Financial liabilities			
Financial assets				Borrowings	2	0	1,016
Investments (others)	355	368	358	Lease liabilities	5	167	128
Loans	59	59	72	Provisions	54	61	71
Other Financial Assets	94	113	160	Deferred Tax Liabilities (Net)	788	1,079	1,149
Other non-current assets	25	122	208	Total of Non-current liabilities	849	1,307	2,364
Total of Non-current assets	10,810	12,365	13,999	Current liabilities			
Current assets				Financial liabilities			
Inventories	6,020	6,429	7,198	Borrowings	2,142	2,641	2,659
Financial assets				Lease liabilities	4	45	62
Investments	510	704	582	Trade Payables	3,396	3,783	3,335
Trade receivables	4,501	5,193	4,334	Other financial liabilities	247	302	426
Cash and cash equivalents	121	236	408	Provisions	55	63	128
Bank balances other than above	1	4	5	Current Tax Liabilities (Net)	35	-	-
Loans	13	13	10	Other Current Liabilities	127	110	224
Other financial assets	51	63	46	Total of Current liabilities	6,006	6,944	6,835
Other current assets	413	780	1,127	Total Liabilities	6,855	8,251	9,198
Current Tax Assets (Net)	-	34	57	Total Equity & Liabilities	22,440	25,821	27,765
Total Current assets	11,630	13,456	13,767				
Total Assets	22,440	25,821	27,765				

HISTORICAL STANDALONE BALANCE SHEET

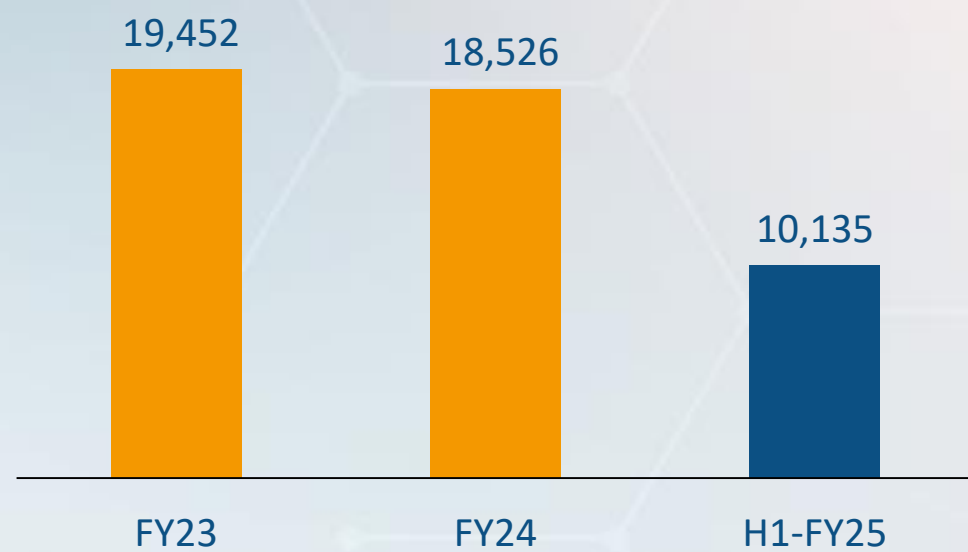


ASSETS (INR Mn)	FY23	FY24	H1-FY25	EQUITY & LIABILITIES (INR Mn)	FY23	FY24	H1-FY25
Assets				Equity & Liabilities			
Non-current assets				Equity share capital	453	453	453
Property, plant and equipment	8,471	9,160	10,167	Equity Share Capital Pending allotment	-	-	-
Capital work-in-progress	622	785	1,160	Other equity	13,933	15,762	16,616
Right-to-use assets	11	205	179	Total equity attributable to equity holders	14,386	16,215	17,069
Other Intangible assets	2	169	266	Liabilities			
Intangible assets under development	397	584	633	Non-current liabilities			
Financial assets				Financial liabilities			
Investment in Subsidiary & Joint Control	135	135	135	Borrowings	0	0	1,015
Investments (others)	292	303	306	Lease liabilities	5	167	128
Loan	59	59	72	Provisions	47	53	56
Other Financial Assets	88	107	146	Deferred Tax Liabilities (Net)	688	979	1,054
Other non-current assets	25	122	207	Total of Non-current liabilities	740	1,199	2,253
Total of Non-current assets	10,102	11,629	13,271	Current liabilities			
Current assets				Financial liabilities			
Inventories	5,377	5,822	6,342	Borrowings	2,067	2,508	2,659
Financial assets				Lease liabilities	4	45	62
Investments	178	128	159	Trade Payables	2,125	2,548	2,261
Trade receivables	3,717	4,488	3,873	Other financial liabilities	231	284	413
Cash and cash equivalents	3	40	235	Provisions	54	62	117
Bank balances other than above	1	4	5	Current Tax Liabilities (Net)	29	-	-
Loans	10	9	7	Other Current Liabilities	128	108	224
Other financial assets	51	63	46	Total of Current liabilities	4,638	5,555	5,736
Other current assets	375	706	1,053	Total Liabilities	5,378	6,755	7,989
Current Tax Assets (Net)	0	30	67	Total Equity & Liabilities	19,764	22,969	25,058
Total of Current assets	9,662	11,340	11,787				
Total Assets	19,764	22,969	25,058				

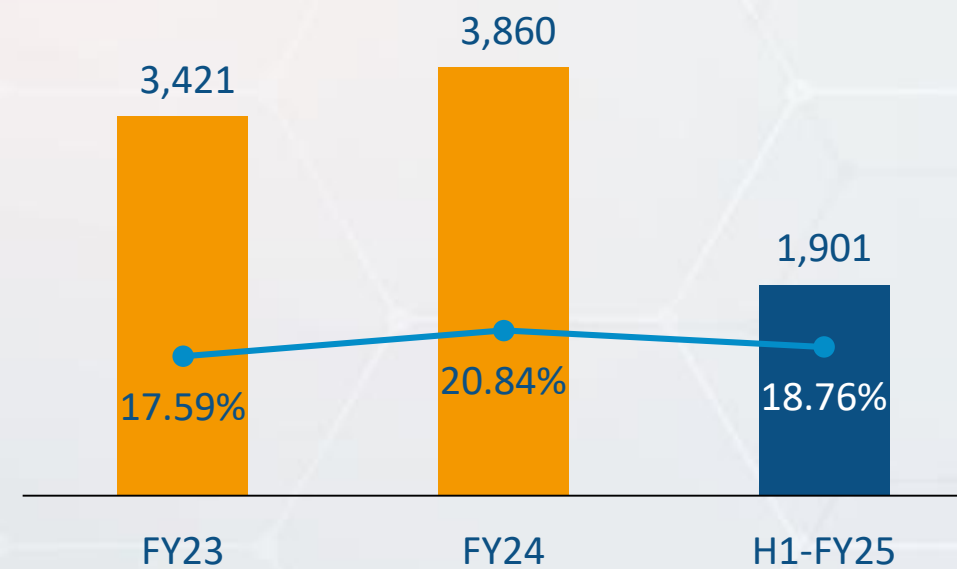
CONSOLIDATED FINANCIAL HIGHLIGHTS



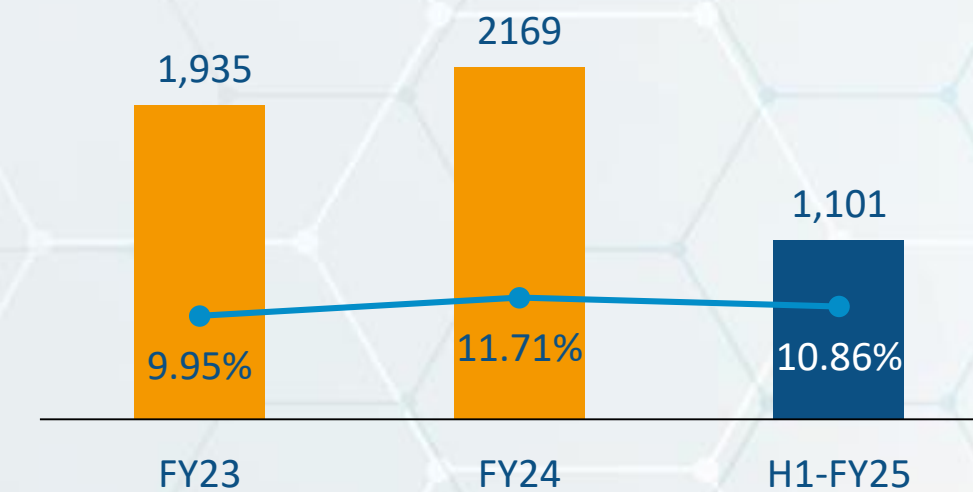
OPERATIONAL INCOME (INR Mn)



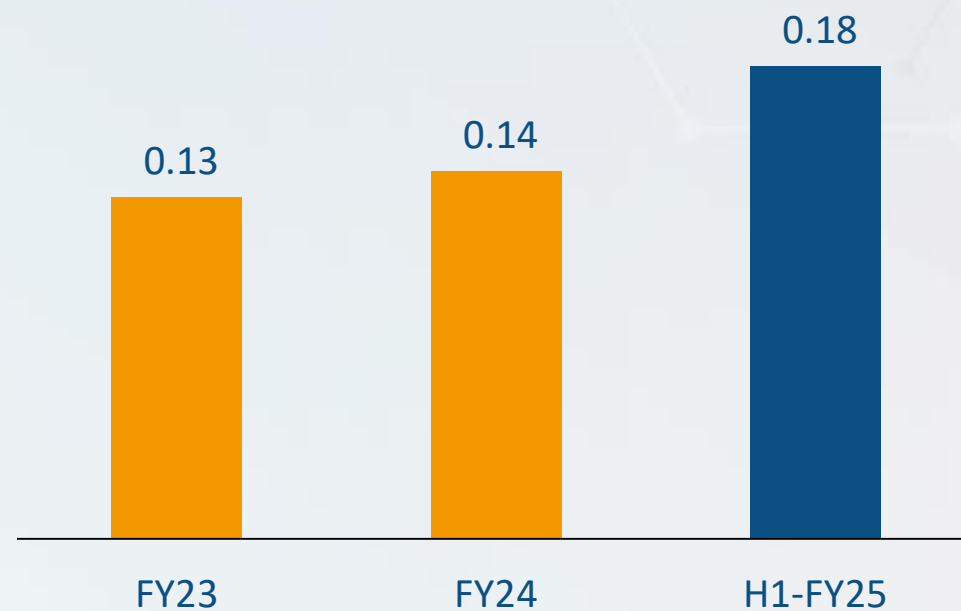
EBITDA (Mn) & EBITDA MARGINS (%)



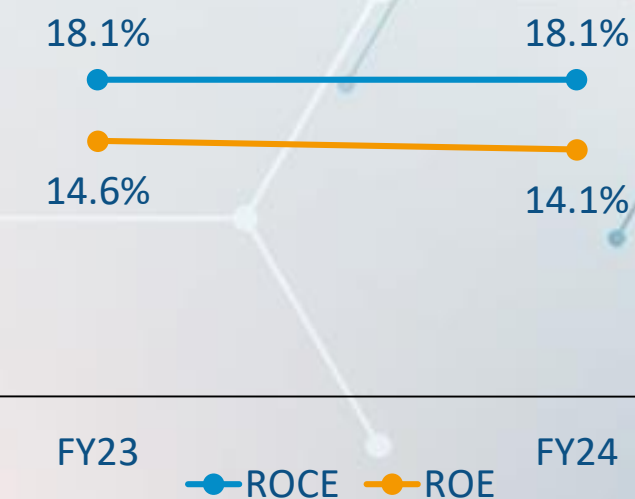
PAT (Mn) & PAT MARGINS (%)



Net Debt to Equity (X)



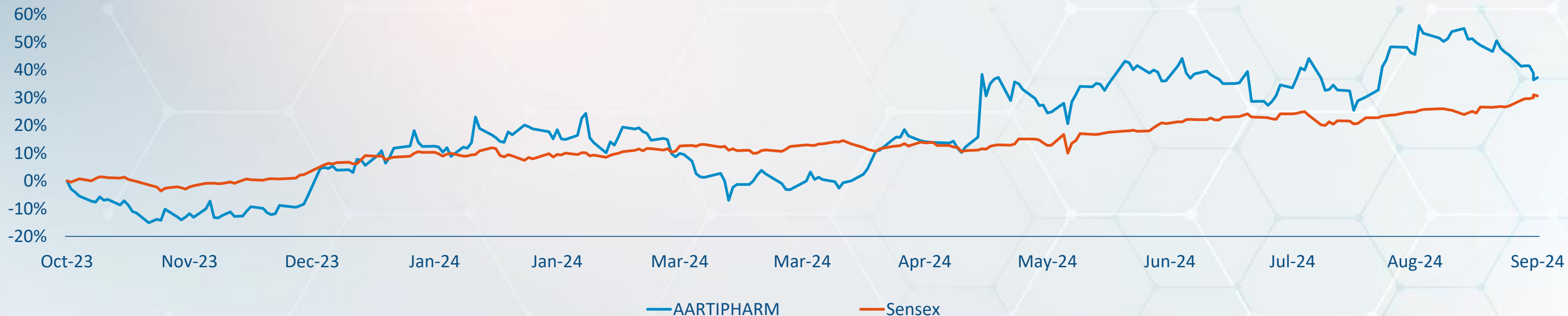
ROCE (%) & ROE (%)



CAPITAL MARKET INFORMATION

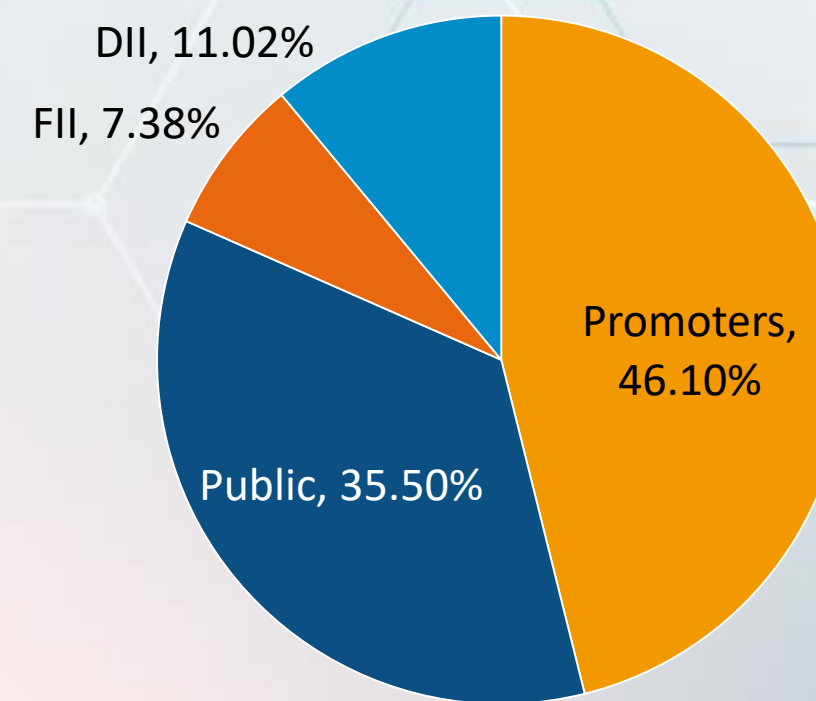


SHARE PRICE UP TO 30th September, 2024



PRICE DATA (AS ON 30 th September, 2024)	INR
Face Value	5.00
Market Price	636.95
52 Week H/L	721.00/371.00
Market Cap (Mn)	57,724.24
Equity Shares Outstanding (Mn)	90.63
1 Year Avg Trading Volume ('000)	308.87

SHAREHOLDING PATTERN (AS ON 30th September, 2024)



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THANK YOU

AARTI PHARMALABS LIMITED