



Enriching Lives

KIRLOSKAR BROTHERS LIMITED

A Kirloskar Group Company

SEC/ F:23

August 01, 2023

BSE Limited

Corporate Relationship Department,
2nd Floor, New Trading Ring,
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai-400 001.

National Stock Exchange of India Ltd.

5th Floor, Exchange Plaza,
Bandra (East)
Mumbai – 400 051.

(BSE Scrip Code – 500241)

(NSE Symbol - KIRLOSBROS)

Dear Sir/Madam,

Sub.: Investor Presentation - Conference Call with Analyst scheduled on August 02, 2023

Ref: Regulation 30 read with Schedule III, Part A Para A of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

In terms of the subject referred regulation, please find enclosed a copy of the Investor Presentation for the Quarter ended on June 30, 2023.

Please note that the above will be uploaded on the Company's website www.kirloskarpumps.com as well.

You are requested to take the same on records.

Thanking you,

Yours faithfully,

For **KIRLOSKAR BROTHERS LIMITED**

Devang Trivedi

Company Secretary

Encl.: As above

Q1 FY 2023-24 Investor Presentation



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KIRLOSKAR BROTHERS LIMITED

Established 1888

A Kirloskar Group Company

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Our Purpose: Vision – Mission – Values



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Our Purpose

- Enriching Lives
- Transcending Boundaries



Our Mission

To lead the industry through reliable, intelligent hydraulic machines & systems providing superior value and ensuring customer delight



Our Vision

Enriching Lives across communities through innovative and sustainable engineering solutions



Our Values

- Teamwork with Mutual Trust & Empathy
- Commitment towards Environment
- Integrity and Accountability
- Speed and Accuracy
- Progressive and Proactive
- Process Centric

Company at Glance



Enriching Lives



Inherent Strength Built Over Time

Presence Since
135+ Years

Global Capabilities
**9 Domestic &
5 International Plants**

Employee Strength
6,000+

Catering to
**6 Continents &
120 Countries**



Strong Brand Portfolio



Diversified Product Portfolio Catering to Wider Applications

Product Offering
250+

SKUs
1,00,000+

Diversified
Application
12+ Industries

Active Customer
Base
2,500+



Giving India its First

Iron Plough
1903

Centrifugal
Pump
1926

Diesel
Engine
1927

Electric
Motor
1940

Lathe
1942

Reciprocating
Compressors
1954

Canned
Motor Pumps
1985

Concrete
Volute Pump
1995

Magnetic
Drive Pump
2000

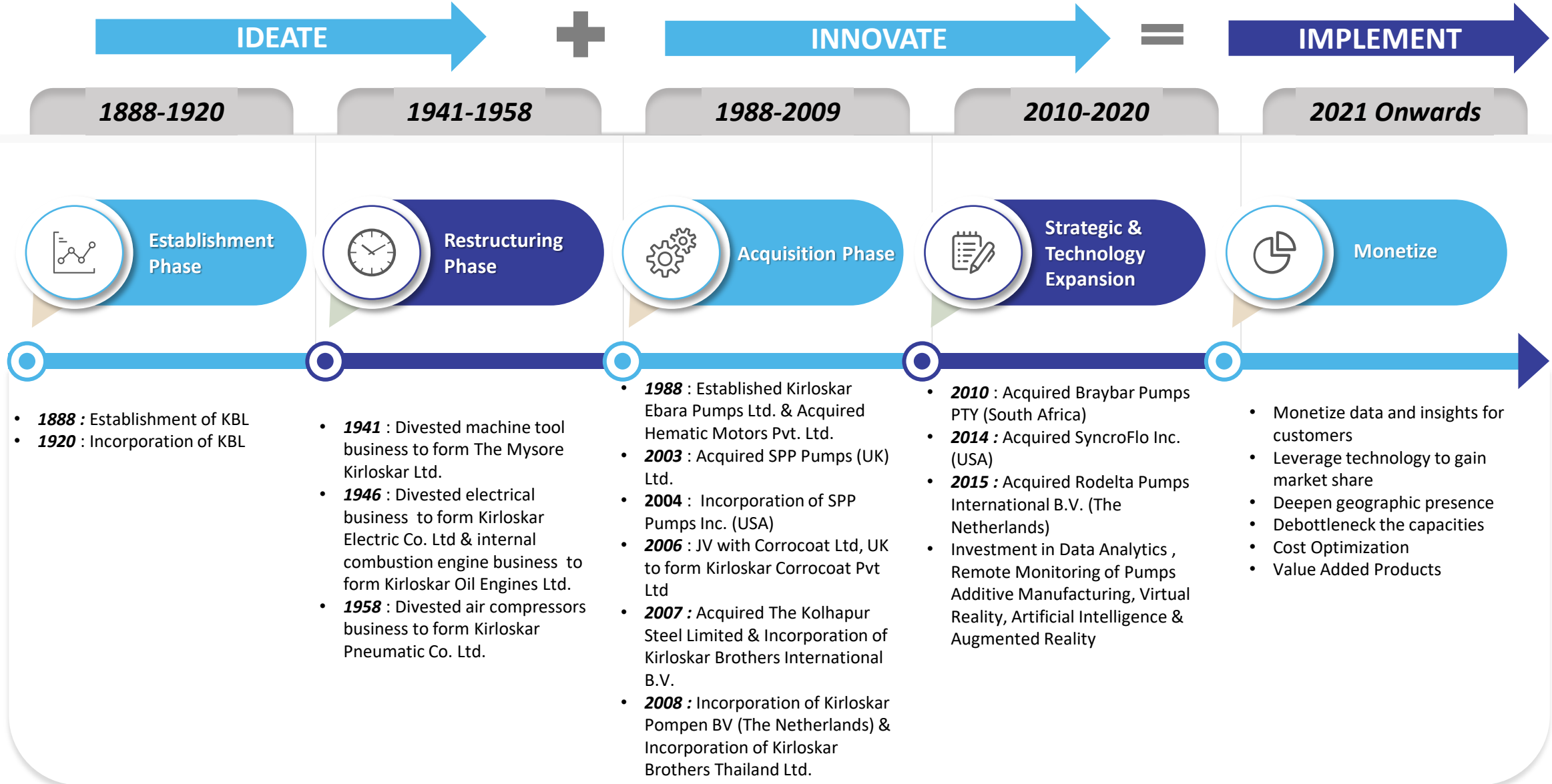
Tamper-proof
Kinetic Air Valve
2010

API Drive
Steam Turbine
2013

Legacy of 135+ Years



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Our Business & Product Line



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Our Business & Application

Large & Medium pumping solutions for complex fluid management system

Small pumps for day-to-day use at households and farms

Valves for industrial and large-scale applications

Hydel turbines

Oil & Gas

Marine & Defence

Bldg. & Const.

Small Pumps



Water Resource

Irrigation

Industry

Nuclear



Our Product Line

75+ Types of Pumps

Flow up to 120,000 m³/hr.
(529,000 US GPM)

Pumps up to 30 MW
(30,000 HP)

Pump Head up to 3,200 m
(4,539 psi)

28+ Types of Valves

Valves with diameter
50 mm to 5 m

Low Tension (LT) induction motors up to 315 frame

Pico and Mini Hydel Turbines (3KW-10MW)

EPC Capabilities

Lowest Life Cycle Cost
LLC™ pumps world-wide

Our Innovative Solutions



Solar Pumping System



Pump Selection Package



Fire Pump Monitoring



Lowest Life-Cycle Cost (LLC)[™] Pump



Sodium Pumps for Nuclear Power Plant



Kirlosmart Condition Monitoring



Augmented Reality Mobile Training



Canned Motor Pump



Additive Manufacturing 3D Printer



Global Footprint Through Local Presence



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Atlanta, USA



Coleford,
United Kingdom



Almelo
The Netherlands



Jebel Ali,
UAE



Shirwal, India



Sanand, India



Karad Projects and Motors
Ltd



Egypt



Johannesburg,
South Africa



Dewas, India



Bangkok, Thailand



Kirloskarvadi, India

Legend

- Global Headquarters
- Manufacturing facility
- Office



Kirloskar Ebara Pumps Ltd



Pune, India



Kondhapuri, India



Kirloskar Corrocoat Pvt Ltd



Coimbatore, India



The Kolhapur Steel Ltd

Highly Qualified Management Team



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Mr. Sanjay Kirloskar

Chairman & Managing Director

- Mr. Sanjay Kirloskar holds a Bachelor's in Science degree in Mechanical Engineering from the Illinois Institute of Technology in Chicago, USA.
- He is also on the Boards of KPT Industries Limited (earlier known as Kulkarni Power Tools Limited), DCM Shriram Industries Limited, Kirloskar Ebara Pumps Limited, Kirloskar Brothers International BV, Netherlands and SPP Pumps Limited, UK.



Mr. Alok Kirloskar

*Director – KBL &
Managing Director – KBI B.V.*

- Bachelor in Business Administration with a concentration in finance from Carnegie Mellon University, Pittsburgh. He has the honour to be on the deans list for this academic excellence.
- Worked in a start-up from 2006 as Business Development manager at Sonasoft Inc (Microsoft CSP)
- Headed the industry sector in KBL and on the board since July 18th 2012. MD of SPP Pumps Ltd since January 2012 and CEO of Kirloskar Brothers International BV since January 2015.



Ms. Rama Kirloskar

*Joint Managing Director- KBL &
Managing Director – KEPL*

- Managing Director of Kirloskar Ebara Pumps Limited, a joint venture between Ebara Corporation, Japan, and KBL.
- Double major in Mathematics and Biology from Bryn Mawr College, USA.
- Served as a GM and Head of the Product Portfolio Management at KBL. Prior to KBL, worked with Polaris Partners, a Boston based VC firm as well as Visterra Inc., an MIT biotech start-up company.
- Also on the Board of KPML and Prakar Investments Pvt Ltd.



Mr. Chittaranjan Mate

Chief Financial Officer

- Mr. Chittaranjan Mate holds Bachelor degree in Commerce and is a Chartered Accountant.
- He is having 40 years of rich experience in Finance. Currently he is working as Chief Financial officer and Senior Vice President (Finance) of Kirloskar Brothers Limited.
- Before joining Kirloskar Brothers Limited he had worked with Kirloskar Ebara Pumps Limited since 1989 and handled various assignments in Finance as well as several other departments

Board of Directors



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Mr. M. S. Unnikrishnan

Independent Director

- Former Managing Director & CEO of the Thermax Group .
- Currently he is on the Board of Thermax Limited, Thermax Onsite Energy Solutions Limited, Thermax Babcock and Wilcox Energy Solutions Pvt. Limited and KEC International Limited.



Mr. Shrinivas V. Dempo

Independent Director

- Chairman of the Goa-based Dempo Group of Companies, which has diversified interests in industries such as shipbuilding, food processing, real estate and newspaper publishing.
- Master of Science degree in Industrial Administration & Finance from Carnegie Mellon University, USA



Mr. Shobinder Duggal

Independent Director

- Bachelor's in Economics (Hons.) from St. Stephens College, Delhi University and a member of Institute of Chartered Accountants of India.
- 35 years of work experience with the Nestle group in India and Switzerland.



Ms. Ramni Nirula

Independent Director

- Retired as Senior General Manager of ICICI Bank Limited.
- She has more than 4 decades of experience in the financial services sector. Currently Ms. Nirula is on the Boards of DCM Shriram Limited, P.I. Industries Limited, HEG Limited, Usha Martin Limited.

Board of Directors



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Mr. Vivek Pendharkar

Independent Director

- Technology Executive based in Silicon Valley for 30+ years with experience spanning Fortune 500 companies as well as Early-Stage Venture backed start-ups and CEO positions for the past 15 years.
- Worked in successive breakthrough technologies emerging out of Silicon Valley.



Ms. Rekha Sethi

Independent Director

- An alumna of St Stephens College, Delhi University. Director General of the All-India Management Association (AIMA), the apex body for management in India.
- Serving on the Boards of some leading Indian companies as an Independent Director



Late. Mr. Amitava Mukherjee

*Independent Director
(Up to 3rd July 2023)*

- Holds Master's degree in Management from the Asian Institute of Management, Manila and a degree in Business Economics from the Delhi School of Economics.
- 20+ years of experience in Investment Banking.

Long Standing Relationships with Marquee Clientele..



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Our Global Partnerships



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Awards & Accolades



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Kirloskarvadi & Dewas – Both Facilities are Greenco Gold certified
Dewas – First pump manufacturing plant to receive Greenco certificate
Kaniyur - First Mini pump manufacturing plant to receive Greenco certificate



KBL's Dewas plant won the prestigious Total Productive Maintenance (TPM) award by Japan Institute of Plant Maintenance (JIPM)

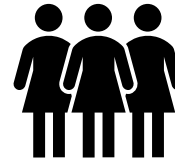


Appreciation by His Royal Highness the King of Thailand for KBL's presence on-site at the Mae Sai cave to offer their technical expertise during the soccer team cave rescue operation



Environmental

- Owned renewable energy sources such as solar power and wind power contribute to 20%-30 % of the total electricity consumption
- Set target of reducing energy consumption by 2% year on year Plants CII GreenCo rated
- Energy efficient lighting system and rainwater harvesting & reduction, reuse and recycling of water
- Use of recycled products as raw material inputs, negligible plastic consumption and plastic waste
- **Zero Discharge Facilities** – No release of release of toxic or non-biodegradable, non-recyclable waste, liquid discharge
- Manufacturer of highly efficient products and energy saving coatings meeting European MEI Norms
- Active engagement with suppliers on environmental issues



Social

- **CSR:** Vikas Charitable Trust established in 1994 for CSR activities.
- CSR activities revolves around Education, Employment, Healthcare, Animal Welfare, Re-skilling War Veterans and Women Empowerment
- Improve lives of community in local areas where we operate
- Social impact initiatives are measured by a third party
- **Employee Welfare:** Multi-pronged approach towards employee development.
- Focused on all aspects of diversity in its workforce be it Gender, Regional or through Affirmative actions. There is no discrimination made during our hiring process irrespective of the position's location, level or type of work



Governance

- Sustainability reporting since 2009-10 and integrated reporting since 2018-19.
- Mandatory Code of ethics examination taken by all the employees every year.
- The Board has an optimum combination of Executive and Non-Executive directors and gender diversification
- Risk Management Governance
- Occupation Healthy Policy
- Regular review and updation of policies in response to the changing requirements
- Whistleblower and POSH policies
- GDPR Compliant

Examples of our CSR activities in India

- Supporting creation of clean water source for underprivileged school kids
- Health-check, eye-check camps and Vaccination camps
- Tree Plantation
- Donating first aid boxes and water pumps to schools of underprivileged school kids
- Self-employment awareness campaign amongst unemployed youths
- Provision & Up-gradation of education facilities for underprivileged school kids
- Save girl-child campaigns and Sponsoring foods for orphaned kids
- Awareness campaign for young farmers relating cultivating and cattle breeding best practices.



Examples of our CSR activities outside India

- SPP Pumps has been recognized as one of United Kingdom's best Apprenticeship Employers in the regional final of the National Apprenticeship Awards 2013
- Listed in England's top 100 apprenticeship employers by City & Guilds and the National Apprenticeship service
- Working with hospice and foodbanks in the UK around our manufacturing facilities to ensure food availability throughout the year
- Work with the Hero's First Foundation in the USA to raise money for war veterans of the Iraq and Afghanistan campaigns which is donated to hospitals and skill building institutions
- Sponsor skill building programs in the Republic of South Africa
- 2% of average net profit for preceding 3 financial years are invested in CSR activities

Corporate Social Responsibility



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All-women operated manufacturing facility in Kaniyur and 35% women workforce in Sanand factory is a testimony to the importance that it bestows towards gender equality and women empowerment.



CSR Initiatives in India



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KBL conducts an array of activities and campaigns throughout the year. The company focuses on three areas for its CSR contributions Education, Healthcare, and Environment through the Vikas Charitable trust and Sou. Radhabai Trust



Biodiversity Project



Kirloskar High School



Hospital



Renovation of Kirloskarvadi Station



Special Bus Donation to Rashtriya Lifesaving Society (India)



Skill Training Program

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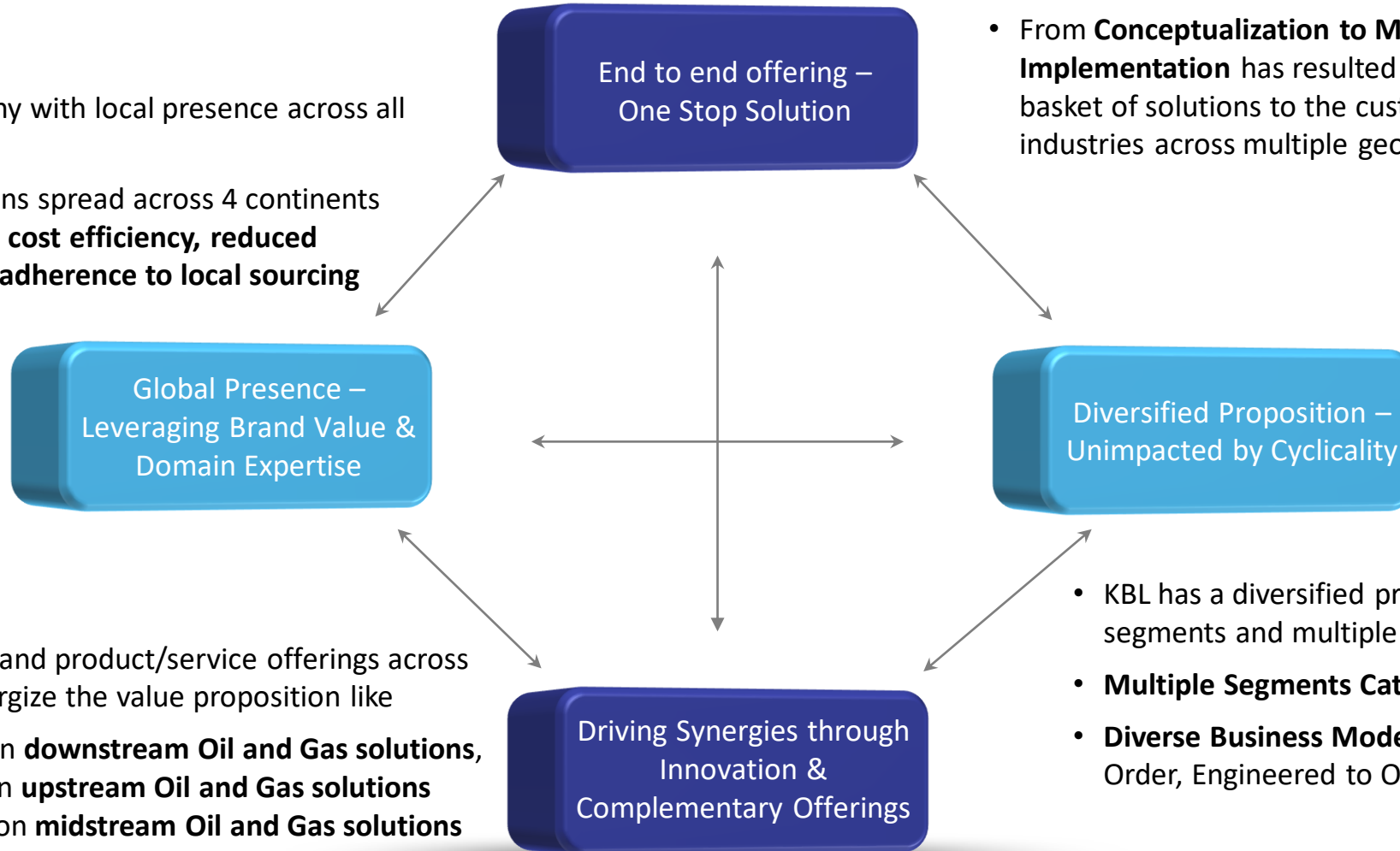
Notable Projects

A Unique Value Proposition



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- KBL is a global company with local presence across all major trading blocks.
- Manufacturing locations spread across 4 continents in 5 countries **ensures cost efficiency, reduced turnaround time and adherence to local sourcing norms**



- From **Conceptualization to Manufacturing to Implementation** has resulted into offering complete basket of solutions to the customers across multiple industries across multiple geographies.

Leveraging innovations and product/service offerings across the subsidiaries to synergize the value proposition like

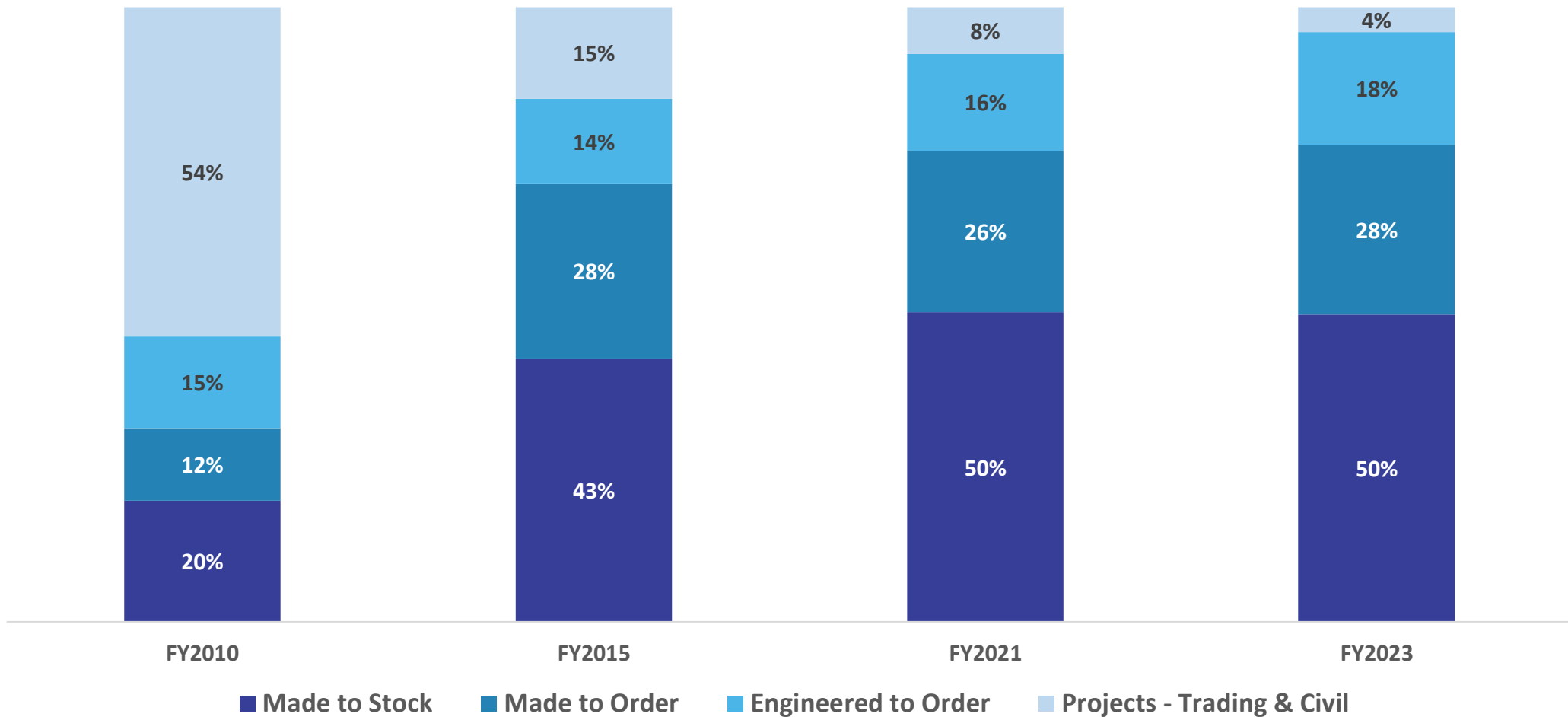
- While KEPL focuses on **downstream Oil and Gas solutions**, SPP Pumps focuses on **upstream Oil and Gas solutions** and Rodelta focuses on **midstream Oil and Gas solutions**
- **3-D printing** at Kirloskarvadi is used to reduce turnaround time for SPP Pumps Service Business

- KBL has a diversified presence across multiple segments and multiple business models
- **Multiple Segments Catered:** B2B, B2C and B2G
- **Diverse Business Models:** Made to Stock, Made to Order, Engineered to Order, EPC and Services.

...And Improving Product Mix



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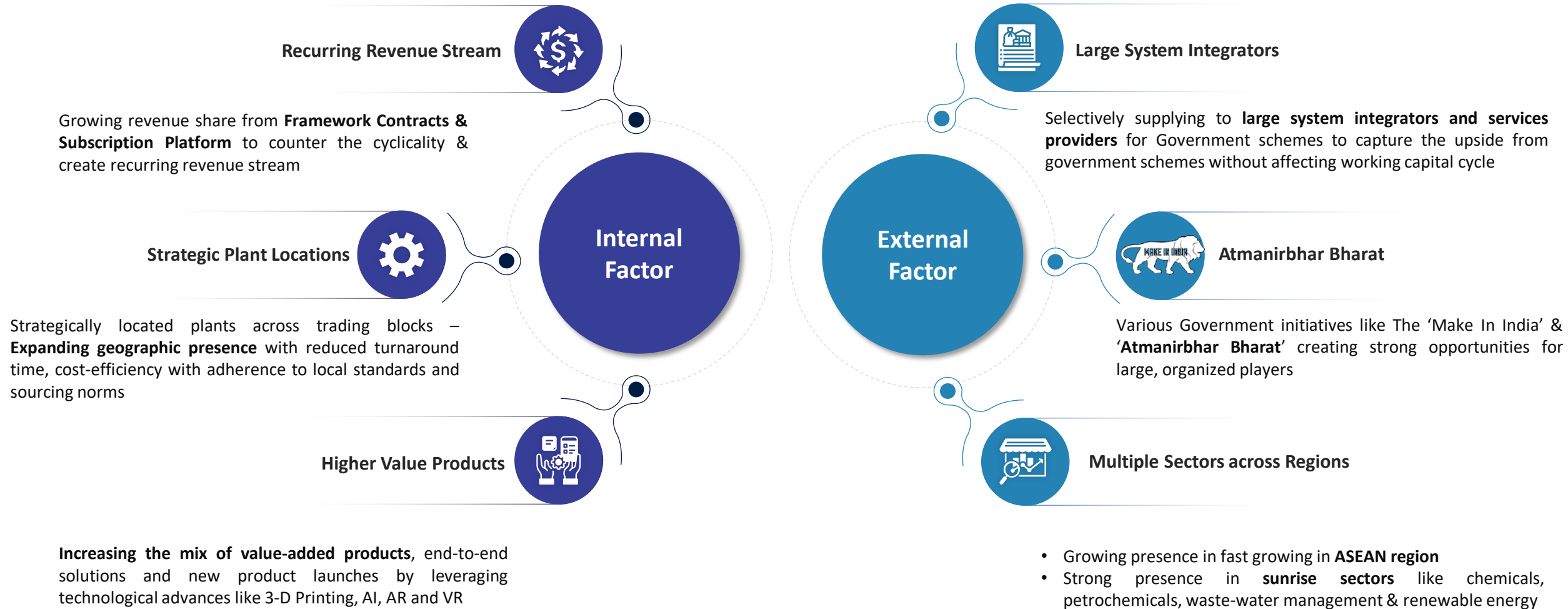
Only KBL (Standalone) has a presence in EPC/Projects Business. No international subsidiaries are present in EPC/Projects.

Note: Pumps installed in Projects jobs are included in Engineered to Order

..Coupled with Multiple Triggers to Drive the Growth Momentum



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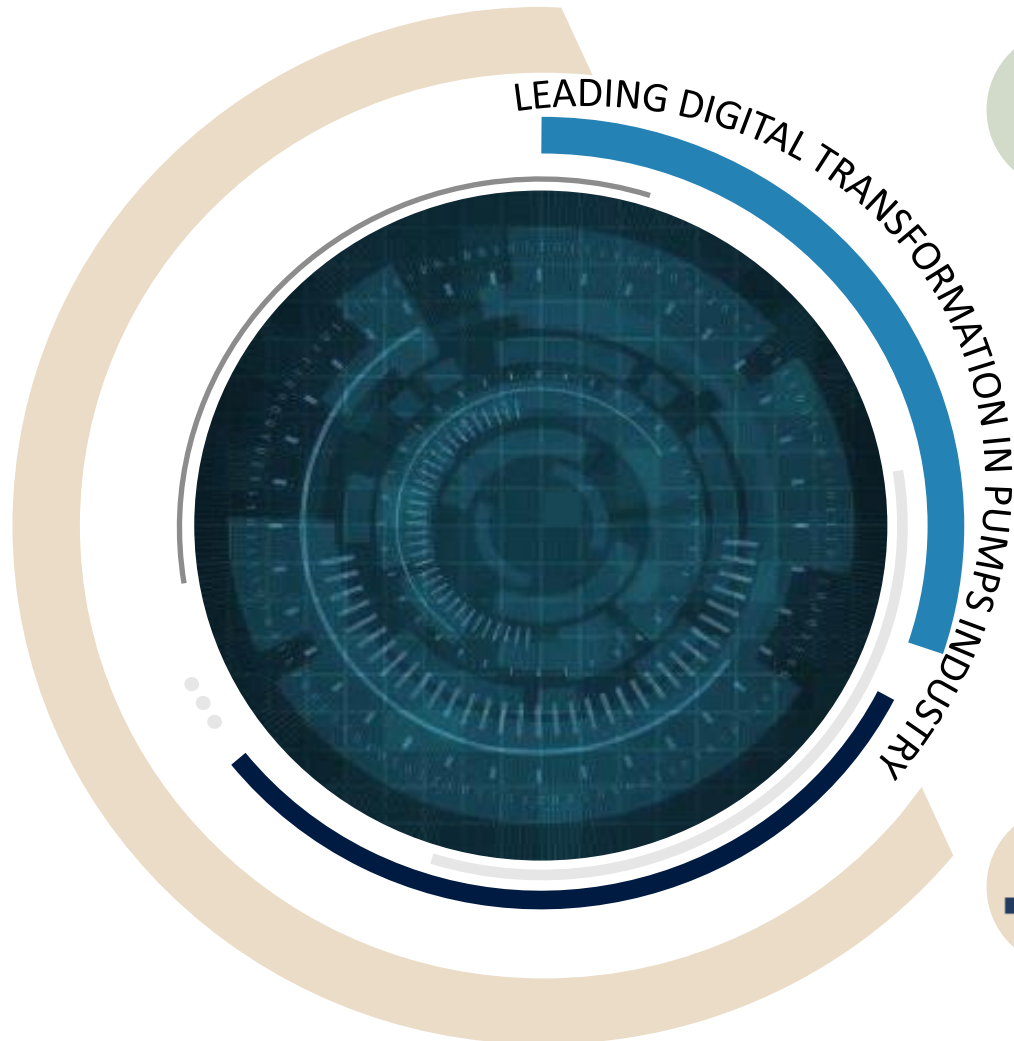


Staying Ahead of the Curve through Digital Initiatives



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- Over a decade, KBL has strategically invested in various strategic digital initiatives like **Virtual Reality (VR)**, **Augmented Reality (AR)**, **Artificial Intelligence (AI)** , **Internet of Things (IoT)** and 3-D Printing - Provides Technological Advantage and additional revenue streams in services business
- Salesforce (SFDC) and SAP-S4 HANA for **Automation and ERP Solutions**



3D Printing

- ✓ **Largest 3-D printer for foundries in the world** installed in 2013 at the Kirloskarvadi Plant and contributes significantly towards faster turnaround for standard & engineered moulds in casting moulds used for domestic and export applications.
- ✓ **Flexible and Universal** - Supports competitor's pumps and products

Augmented Reality/ Virtual Reality

- ✓ Used for training the employees and customers
- ✓ Consistent service delivery by documenting knowledge of service engineers over a decade & ensuring this knowledge is the IP of KBL

Artificial Intelligence

- ✓ Dolphin – Proprietary Machine Learning Algorithm
- ✓ Analysis automation based on historical and live data – Higher uptime and lowered catastrophic failure for customers

IoT

- ✓ Remote multiple pump monitoring and diagnostics tool – Accessible through smartphones and computers
- ✓ IoT enables manufacturing across domestic plants

Subscription Platform - Creating Market Opportunity



Subscription platform is aimed towards leveraging the **technological and domain expertise** to create a scalable and sustainable business

Traditional Solution

- Manage customer site, refurbish, repair & upgrade all the pumps in phased manner
- Periodic site visits and higher manpower required
- Difficult to scale-up the offering
- Higher turnaround time

KBL's Innovative Solution - Subscription Platform

- Proprietary Innovative Solution by KBL
- Remote failure prediction analytics, troubleshooting and monitoring
- Lower turnaround time
- No periodic site visits required.
- Higher uptime, lower catastrophic failures and spare part inventory carrying costs to the customer
- Highly scalable with less manpower requirement

Market Opportunities

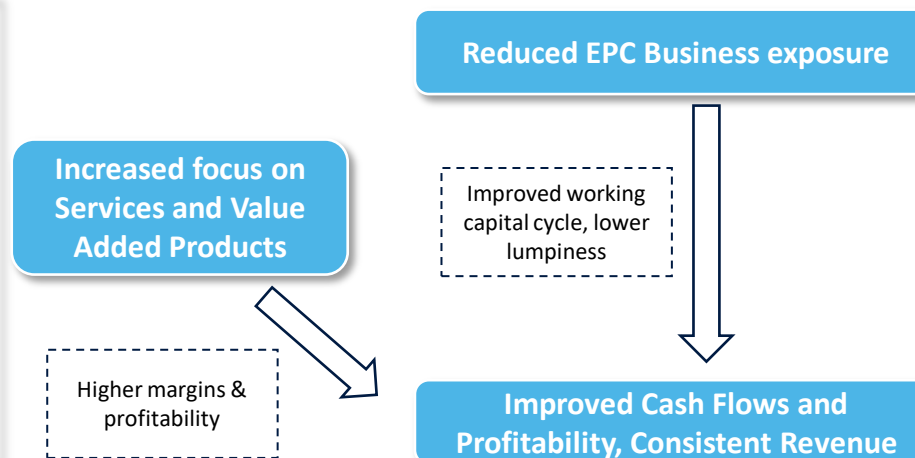
Market Opportunities

- **Scalable & Universal:**
 - The proprietary algorithm keeps on improving on a live basis
 - With easy scalability, product can be scaled across geographies
- **Multiple Revenue Streams:**
 - Subscription fees (recurring service revenue without additional costs) and product revenue on repairs, upgrades and maintenance.
 - Potential to convert all the existing AMC and Framework contracts into subscription platform

KBL has strategically reduced EPC business exposure and increased contribution from Services & Value-Added Products

Reduced Exposure to EPC business

- KBL has reduced exposure towards low margin, lumpy and working capital intensive EPC orders since 2008. Share of EPC to the revenue has come down drastically (**75% in FY10 to 5% in FY23**)
- Taking selective exposure in profitable contracts
- Very few old projects orders remain unexecuted
- Presence in Water, Power & Irrigation sectors without taking EPC exposure



Well poised for future opportunities

- Being one of the leading players in Pumps and Valves with a successful track record of 9+ decades, KBL is well positioned to capitalise on the future opportunities

Strategy Going Forward

✓	Focus on Value-Added Products & Services	<ul style="list-style-type: none"> ▪ Increase share of value-added products across geographies and subscription services in key international subsidiaries
✓	Monetize IPs	<ul style="list-style-type: none"> ▪ KBL has a strong IP with 23 patents applied of which 17 patents are awarded (2 USA valid patents) ▪ Monetize digital IP acquired over the years by expanding contribution from services business and value-added products
✓	Leverage Global Presence	<ul style="list-style-type: none"> ▪ Expand and deepen the existing geographic presence by leveraging presence of international subsidiaries while complying to the local sourcing norms across geographies
✓	Debottlenecking & Cost Optimisation	<ul style="list-style-type: none"> ▪ Debottlenecking at key domestic subsidiaries ▪ Cost optimisation across domestic and international subsidiaries
✓	Strong Thrust on Quality & Product Innovation	<ul style="list-style-type: none"> ▪ R&D Centers housing dozens of experts having rich experience in the industry ▪ <i>8 new products have earned the India Design Mark in last 5 years</i>

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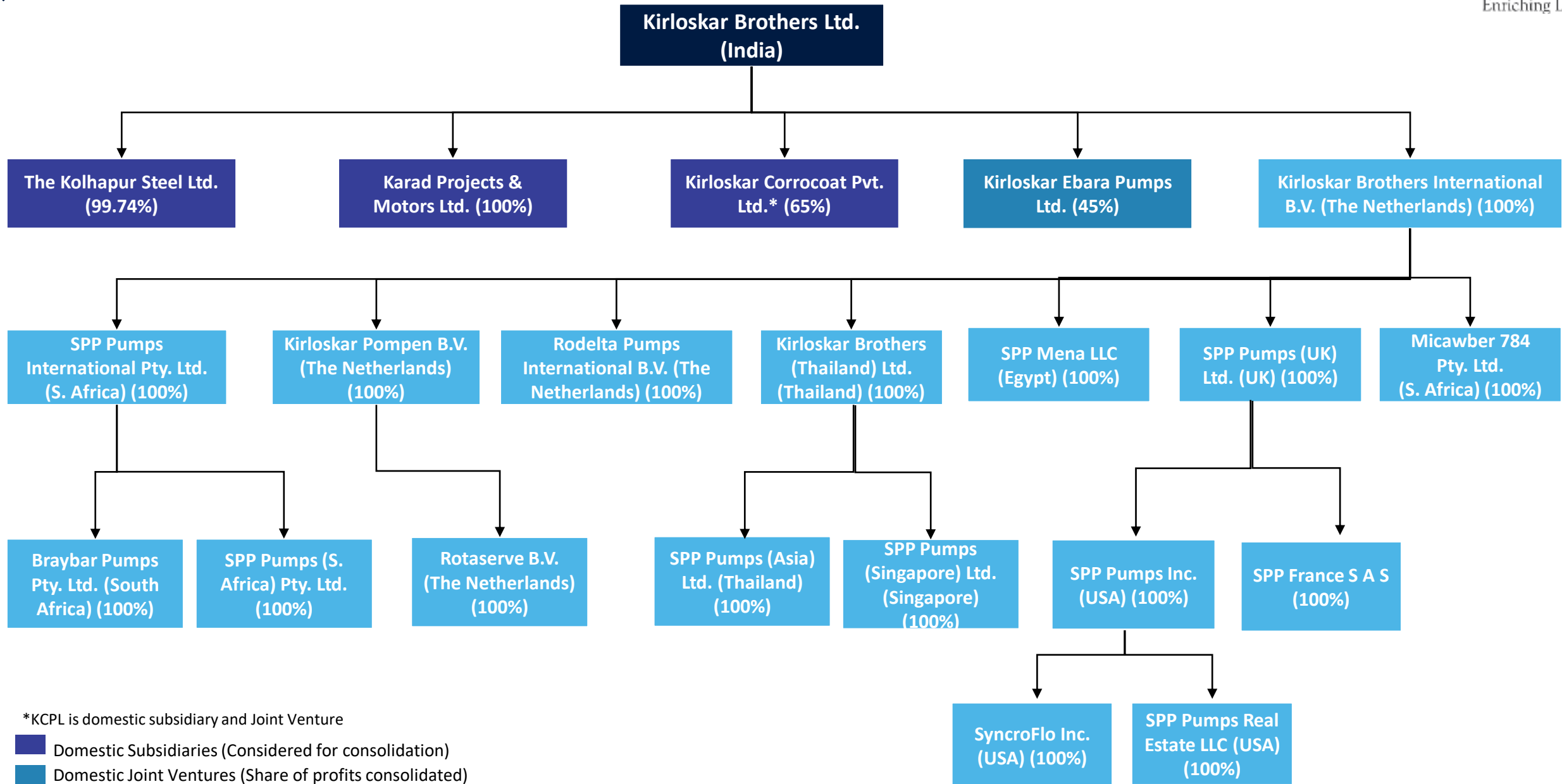
06

Notable Projects

Group Structure



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*KCPL is domestic subsidiary and Joint Venture

- Domestic Subsidiaries (Considered for consolidation)
- Domestic Joint Ventures (Share of profits consolidated)
- International Subsidiaries (Considered for consolidation)

Leveraging the localised global presence



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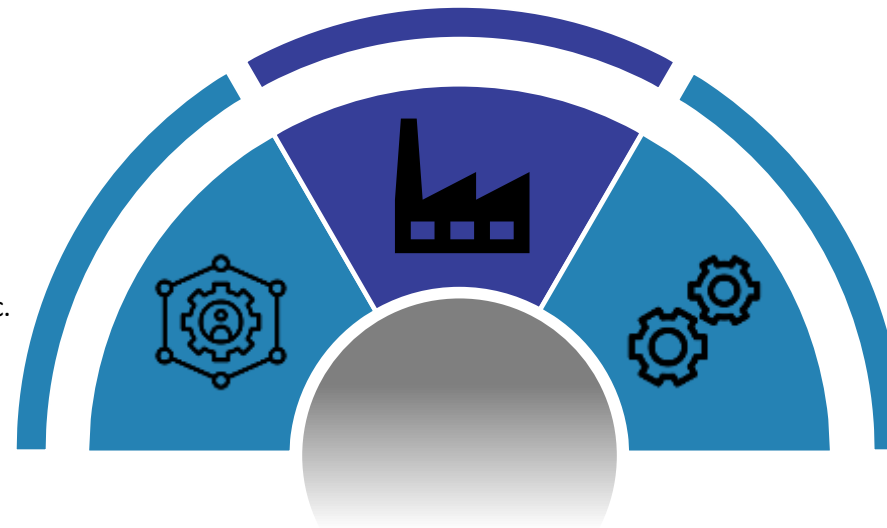
KBL is leveraging the localised global presence through cost-synergies, duty-free access and local sourcing norms

Duty-free Access & preference to Local Manufacturers

- Provides duty-free access to fast-growing ASEAN region through value addition done in Thailand. (20%-30% depending upon a product)
- Preference to the local manufacturers especially in Thailand and South Africa
- SPP Inc. USA is compliant with the new 'Buy American' program and meets the criteria

Cost Synergies

- Reduction in turnaround time
- Lower freight costs
- The subsidiaries do the local value addition in terms of components, repair, maintenance and services, etc.



Local Sourcing Norms and Regulations

- Presence in South Africa through a local subsidiary to comply with Broad-Based Black Economic Empowerment Program
- Other subsidiaries in the US, UK and Netherland to adhere to local sourcing norms

Genesis

- Wholly owned subsidiary of Kirloskar Brothers Limited
- Formed with the objective of making it a SPV that would function as an Investment Company for all international businesses
- **It comprises following major subsidiaries abroad:**
 - SPP Pumps (UK) Ltd.
 - SPP Mena LLC (Egypt)
 - Kirloskar Brothers (Thailand) Ltd.
 - Rodelta Pumps International B.V. (The Netherlands)
 - Kirloskar Pompen B.V. (The Netherlands)
 - SPP Pumps International Pty. Ltd. (South Africa)

Product Profile

- Bi-directional Axial Flow Pumps
- Chemical pumps
- Containerized pump sets
- Electro-submersible pumps
- Fire fighting pumps & Products
- Plumbing & HVAC Systems
- Pre-packaged Pumping Systems
- Transformer oil pumps
- Water supply pumps

Geographies Catered

- | | | |
|------------|-------------------|------------|
| • Cambodia | • Malaysia | • Thailand |
| • China | • Philippines | • Turkey |
| • Egypt | • Poland | • UAE |
| • France | • Singapore | • UK |
| • Iraq | • South Africa | • USA |
| • Italy | • South-East Asia | • Vietnam |
| • Laos | | |

Industries Catered

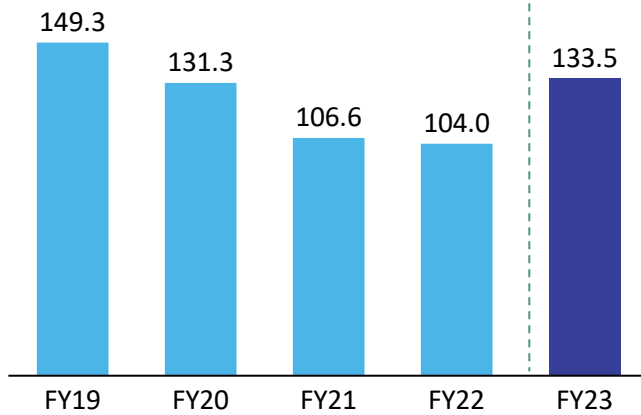
- | | |
|--------------------------------|----------------------------|
| • Chemicals | • Irrigation |
| • Commercial Building Services | • Mining |
| • District Heating | • Municipal Water Supply |
| • Dry Dock | • Oil & Gas |
| • Fire | • Power |
| • Flood Control | • Pulp & Paper |
| • HVAC | • Transformer |
| • Industrials | • Water treatment & supply |

Kirloskar Brothers International B.V.*, The Netherlands

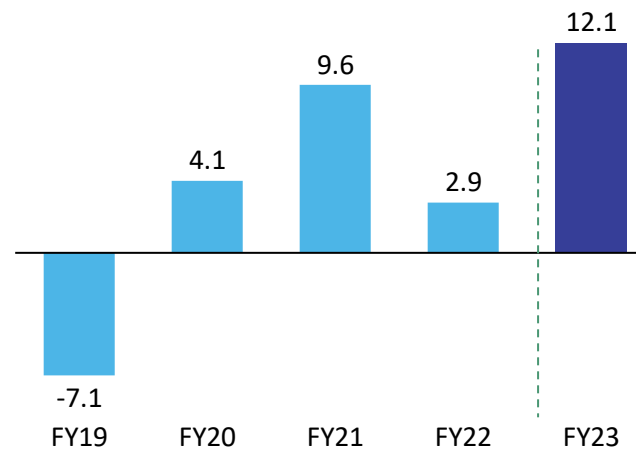


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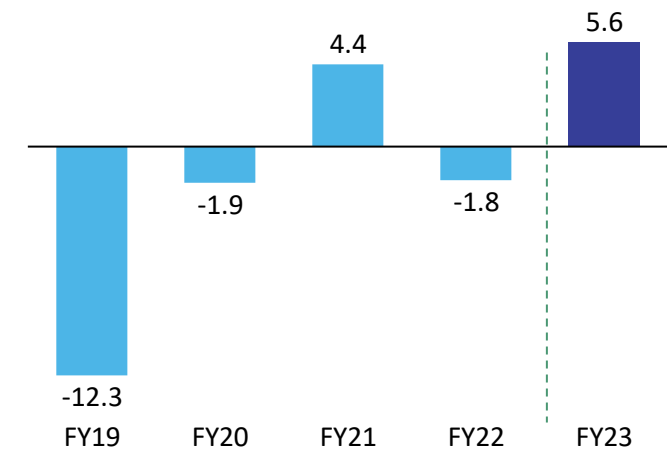
Revenue (€ Mn.)



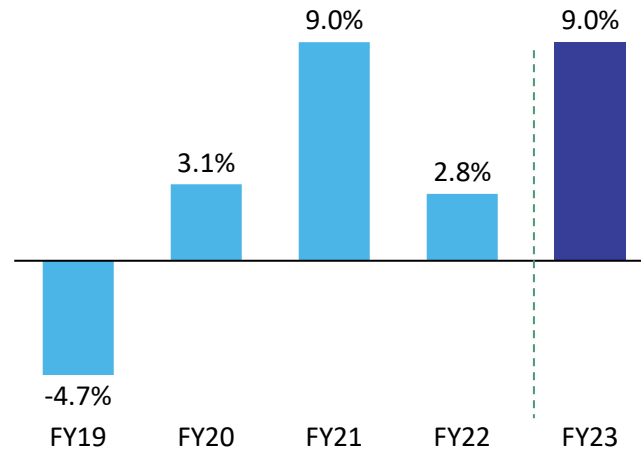
EBITDA (€ Mn.)



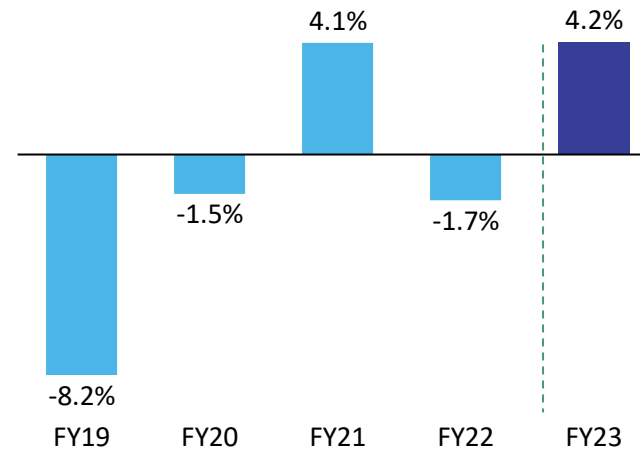
PAT (€ Mn.)



EBITDA Margin (%)



PAT Margin (%)



* Holding company of all international businesses
 ** Hedge accounting implemented by SPP UK from July 22 hence effect of currency fluctuation will be minimal

SPP Pumps Limited, United Kingdom



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Genesis

- 145+ years of heritage
- R&D, manufacturing and test facilities in the UK
- Worldwide revenues of £95m (~25% of consol. KBL Revenue turnover in 2023) ; 70% trade global, outside the UK
- Highest market share in fire pump packages business.
- Lowest life cycle cost pump range
- **Current Orderbook:** £ 81 million

Product Profile

- Lowest Life Cycle Pumps for water supply and industrial
- Firefighting pumps
- Transformer oil pumps
- Containerised pump sets
- Electro-submersible pumps
- Vertical Line shaft pumps
- Multi-Stage, Multi-Outlet pumps
- Framework and AMC contracts for Services (field service and service centre)

Strategy

- ✓ *Leading digital & innovative initiatives for KBL Group*
- ✓ *Pushing the maintenance services business which started in 2016.*
- ✓ *Diversifying the product profile*
- ✓ *Focus on the service business with large number of framework contracts*

Geographies Catered

Italy	South Africa
UK	Singapore
USA	Poland
France	
Egypt	
UAE	
South-East Asia	

Industries Catered

Fire	Power
Municipal Water Supply	Spares & Services
Oil & Gas Upstream	Commercial Building
Transformer	Oil & Gas
Waste-Water Management	
Chemicals	
Flood Control	



SyncroFlo Inc., The United States of America



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Genesis

- Leading American pump packager
- Wholly-owned Subsidiary of SPP Pumps Limited
- The 1st company for pre-packaged pumping systems for domestic water (plumbing) use.
- SyncroFlo started by making plumbing boosters, then municipal was added. In the late 1980's, started building packages for HVAC, fire protection, and turf irrigation.

Product Profile

- Plumbing & HVAC Systems: Ironheart PR, Ironheart LT, ES Ironheart, VMS Ironheart, Custom Commercial, Heat Transfer Systems,
- Pre-packaged Pumping Systems: Municipal Systems, Emergency Water Systems, Industrial Systems, Irrigation Systems, Control Systems, VMS Muniheart
- Fire Products: Split Case, Vertical In-line, Vertical Turbine, Fire Pump Packages

Strategy

- ✓ Focus on Niche Products - Packaged fire-fighting and pressure booster sets
- ✓ Leverage Technology – Reduce costs and turnaround time
- ✓ Expansion of distributor network

Geographies Catered

- USA
- Canada
- Mexico
- Egypt
- Kingdom of Saudi Arabia

Industries Catered

- HVAC
- Irrigation
- Industrials
- Water Treatment
- Commercial Building Services

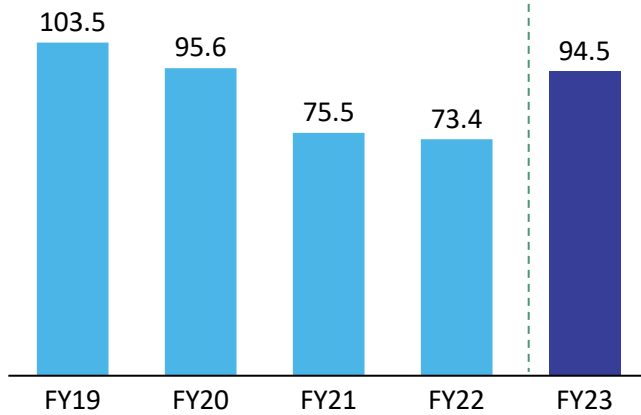


SPP Pumps Limited, United Kingdom

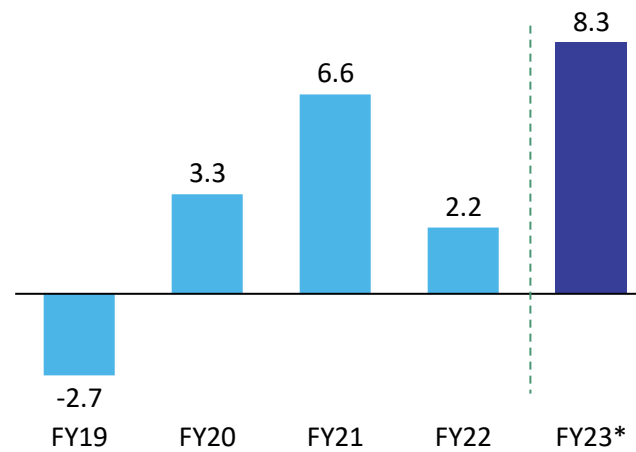


Enriching Lives

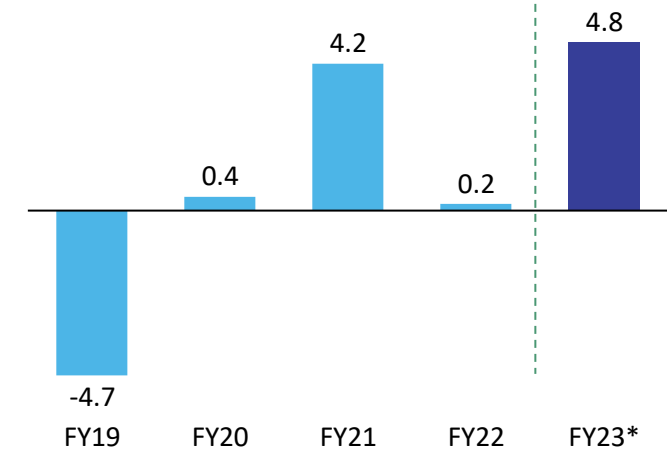
Revenue (£ Mn.)



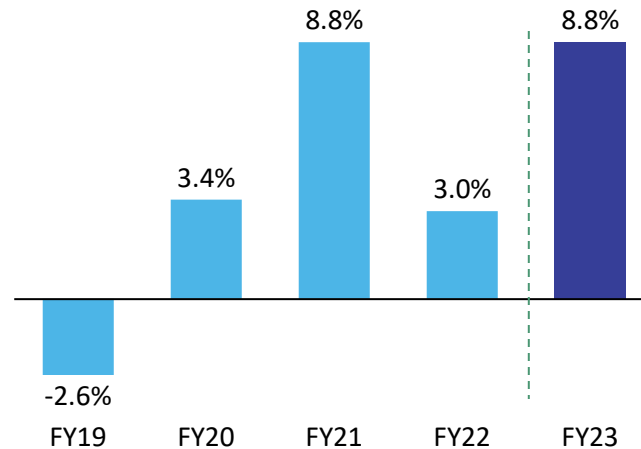
EBITDA (£ Mn.)



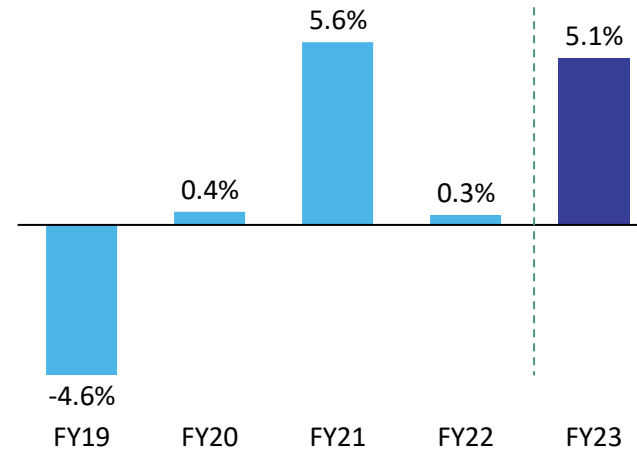
PAT (£ Mn.)



EBITDA Margin (%)



PAT Margin (%)



Note: Including SPP Inc. and SPP France
 * Hedge accounting implemented from July 22 hence effect of currency fluctuation will be minimal

Rodelta Pumps International B.V., The Netherlands



Enriching Lives



Genesis

- Established by Sulzer in 1946, acquired by KBL in June 2015
- Leading manufacturer of API and Non-API pumps
- R&D, manufacturing and test facilities in Almelo, Netherlands
- On Cusp of Turnaround: Turnaround expected in FY22, through favourable product mix
- Current Orderbook: € 7 million

Product Profile

- API Pumps conforming to API-610 standards, 12th edition
- Pumps for Municipal Water Supply complying to EU Standards
- Pre-fabricated Concrete Volute Pumps
- Bi-directional Axial Flow Pumps
- After-sales and services for upgradation of pumps and pump stations in the Benelux region

Strategy

- ✓ *Niche product launches – fish-friendly pumps and OH5 pumps for Hydrogen Production*
- ✓ *Turnaround & improve profitability through a specialised product profile*
- ✓ *Leverage the brand profile and expand the geographic presence*

Geographies Catered

China
Benelux
Iraq
South-East Asia
Turkey
UAE
UK

Industries Catered

Oil & Gas Midstream	Waste-Water
Oil & Gas Upstream	Chemicals
Pulp & Paper	Water
Power	Dry Dock
Irrigation	Flood Control
District Heating	

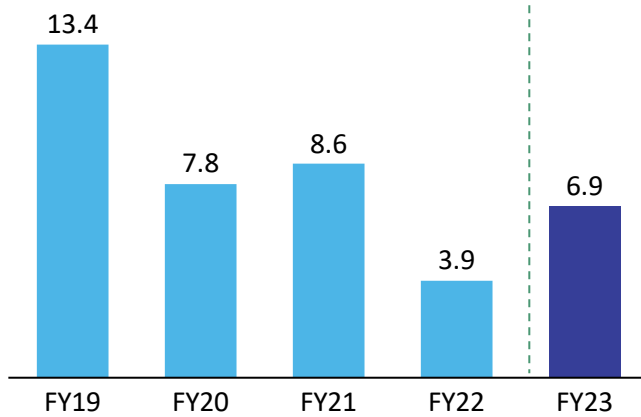


Rodelta Pumps International B.V., The Netherlands

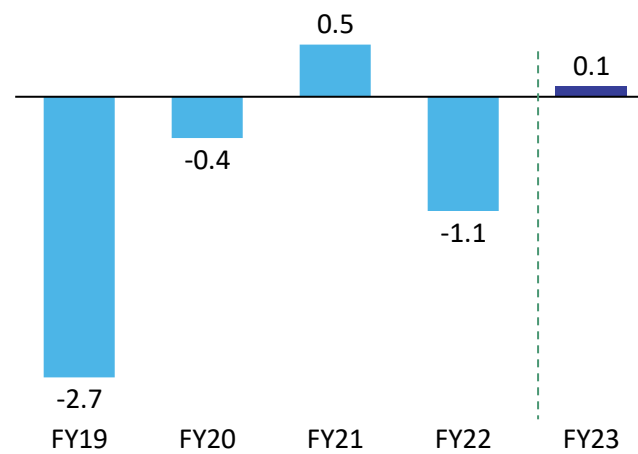


Enriching Lives

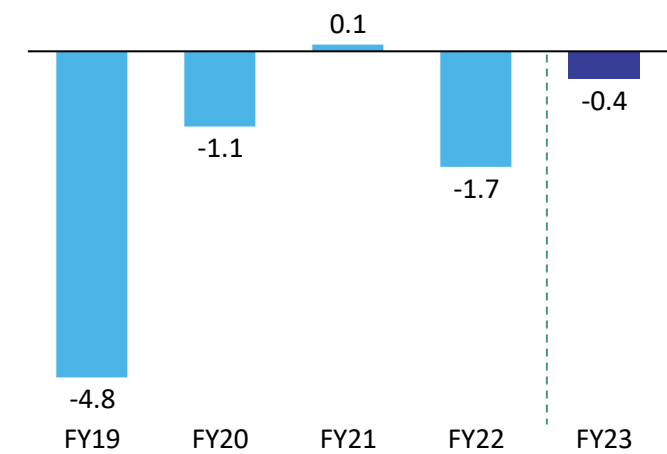
Revenue (€ Mn.)



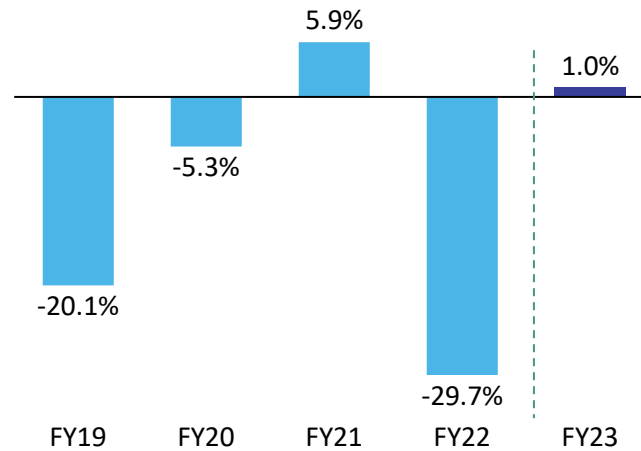
EBITDA (€ Mn.)



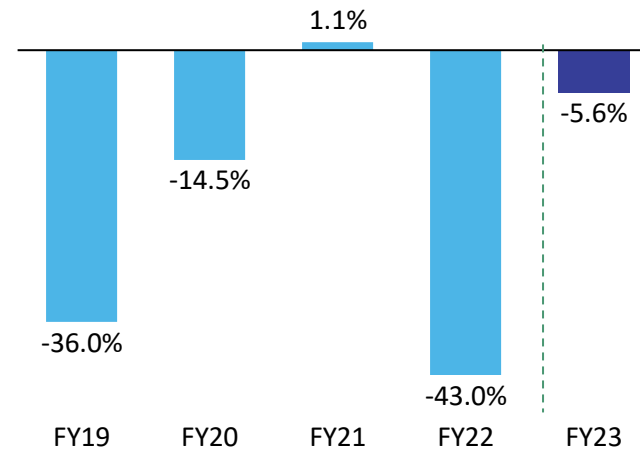
PAT (€ Mn.)



EBITDA Margin (%)



PAT Margin (%)



Note: Along with KPBV and Rotaserve

Kirloskar Brothers (Thailand) Limited, Thailand



Enriching Lives

Genesis

- Assembly and packaging for sales of centrifugal pumpsets in South-East Asian markets
- Provides duty-free access to fast-growing ASEAN region through value addition done in Thailand.
- Current Orderbook: Thb 431 million

Product Profile

- Fire fighting pumps
- Chemical pumps
- Water supply pumps
- Waste water pumps
- Services (Field service and service centers)

Strategy

- ✓ Access ASEAN region duty-free through value addition in Thailand
- ✓ Brand Development and distribution network expansion in ASEAN region
- ✓ Continue to reduce the lumpiness of the cashflows by focussing to build a standard and engineered daily business

Markets Catered

- Thailand
- Singapore
- Malaysia
- Cambodia
- Laos
- Philippines
- Vietnam

Industries Catered

- Chemicals
- Mining
- Municipal Water Supply
- Power
- Commercial Building Services (Fire & HVAC)

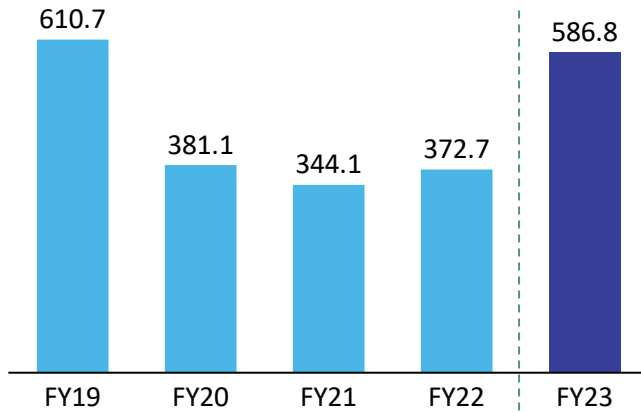


Kirloskar Brothers (Thailand) Limited, Thailand

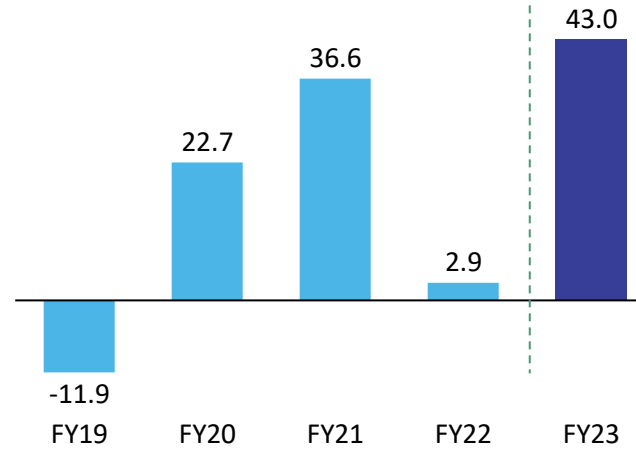


Enriching Lives

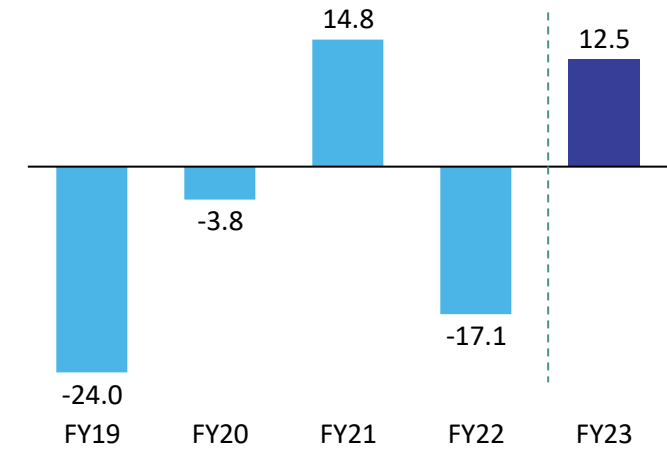
Revenue (THB in Mn.)



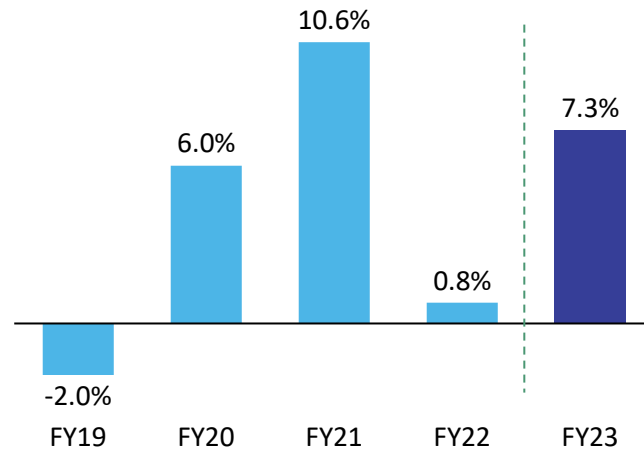
EBITDA (THB in Mn.)



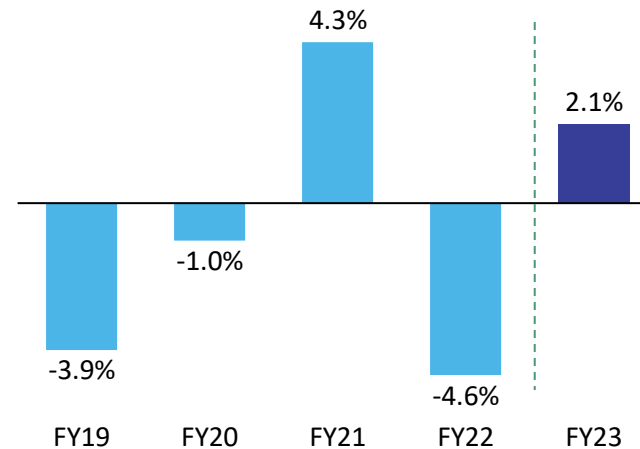
PAT (THB in Mn.)



EBITDA Margin (%)



PAT Margin (%)



Note : Financials Include SPP Asia and SPP Singapore

Genesis

- Manufacturing and sales of high head multi-stage pumps, rubber lined slurry pumps and white metal lined bearings
- Successfully overcome the BBBEE regulations and turned around the business by changing the business mix over the last three years.
- Current Orderbook: ZAR 26 million

Product Profile

- Fire fighting pumps
- Mine de-watering pumps
- Chemical pumps
- Water supply pumps
- Re-engineering services for all pumps
- Services (Field service and service centers)



Strategy

- ✓ *Improve product mix*
- ✓ *Maintain profitability*

Markets Catered

- South Africa
- Zambia
- Botswana
- Angola
- Mozambique
- Kenya
- Uganda
- Tanzania

Industries Catered

- Mining (Copper, Gold, Uranium)
- Water supply
- Chemicals
- Commercial Building Services (Fire & HVAC)

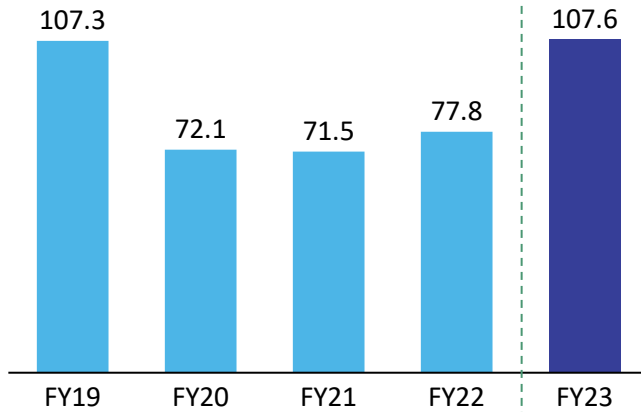


Braybar Pumps Limited, South Africa

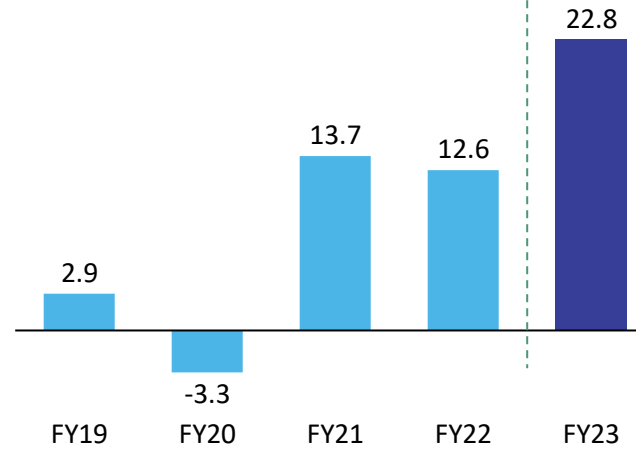


Enriching Lives

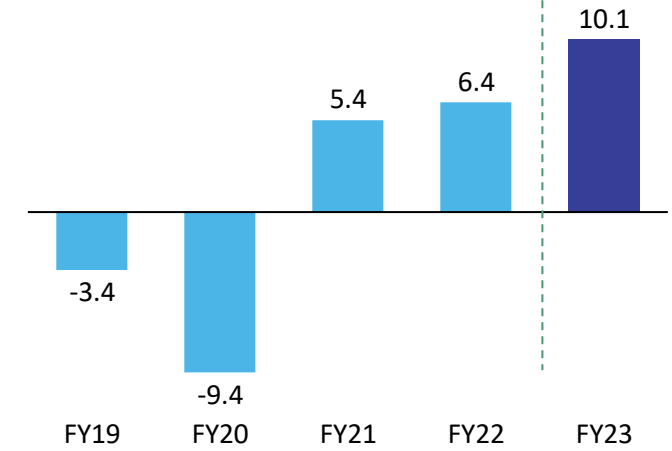
Revenue (ZAR Mn.)



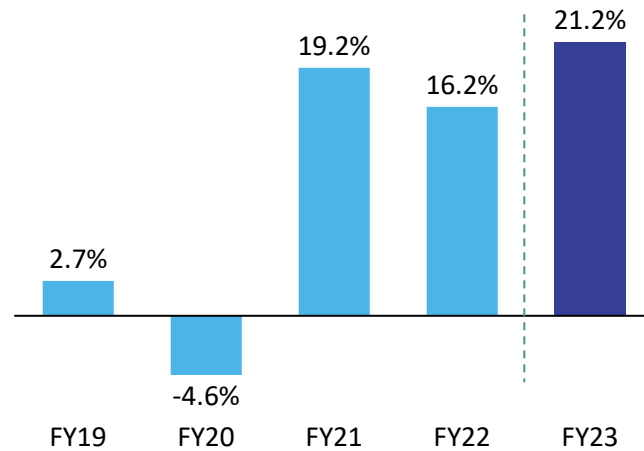
EBITDA (ZAR Mn.)



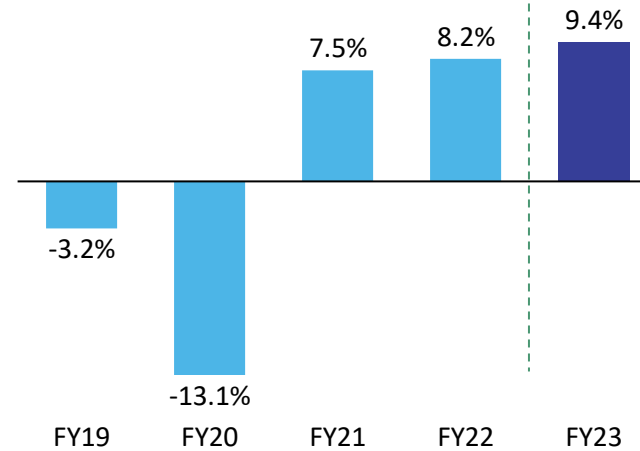
PAT (ZAR Mn.)



EBITDA Margin (%)



PAT Margin (%)



Note: Along with SPP International, SPP SA and Micawber

Karad Projects And Motors Limited (KPML)



Enriching Lives



KPML

KARAD PROJECTS AND MOTORS LIMITED

Strategy

- ✓ *Cost Leadership through Backward Integration*
- ✓ *Product expansion – Electronics, Smart Systems and Products*

Genesis

- KPML is a wholly owned subsidiary of KBL.
- 3 manufacturing plants located at Karad, Maharashtra, India.
- Expertise in manufacturing of Electrical Stampings, Stators, Rotors, Shaft, Rotor fitted shafts, AC rotating machines, Mini water handling pumps, Connecting Rods and Drive Units.

Product Profile

- **Stamping:** Electrical Stampings, Core packs, Wound Stators, Die Cast Rotors, Copper Brazed Rotors, Rotor Fitted Shafts, Motors for Submersible pumps (water filled), Controls Panels
- **Motors:** 3 Phase AC induction Motors (incl. IE4, IE5), Elevator Motors, NS - Stators -Rotor fitted shaft, Stators ,Domestic water handling pumps, Motors for Submersible pumps (Oil filled) etc.
- **Components:** Drive Units for Pumps & Connecting Rods for ACR industry, Components for auto priming system (Priming tank & Coalescer)

Markets Catered

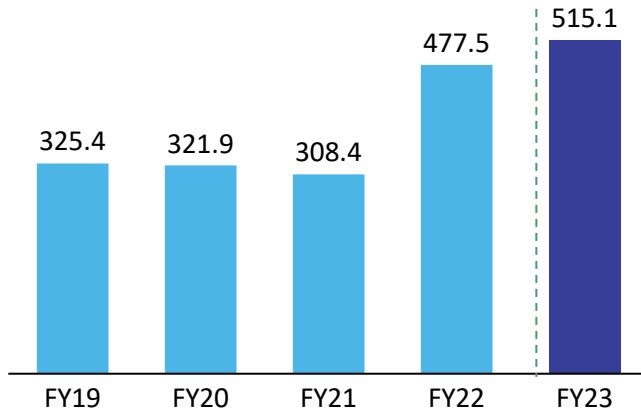
- Austria India
- Germany
- France
- USA
- Mexico
- China
- Spain
- UK

Industries Catered

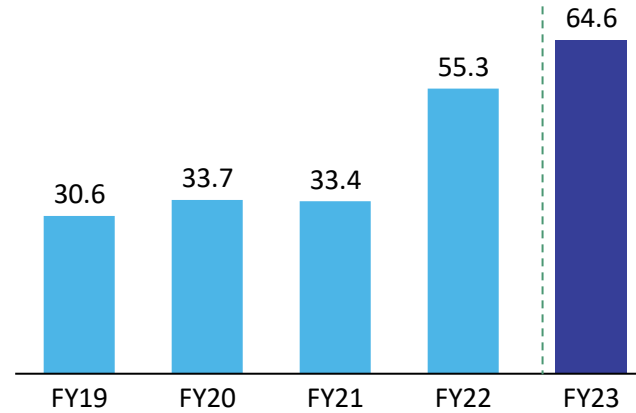
- Pumps
- Hermetic Compressors
- Healthcare
- Elevator



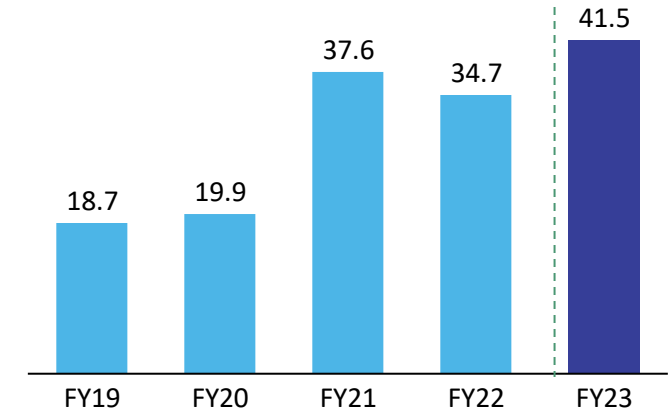
Revenue (Rs. Crores)



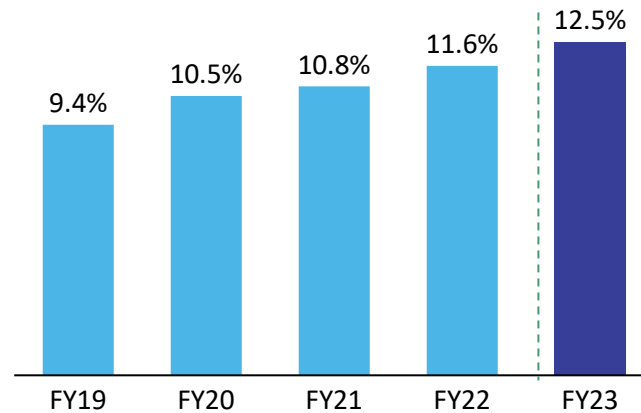
EBITDA (Rs. Crores)



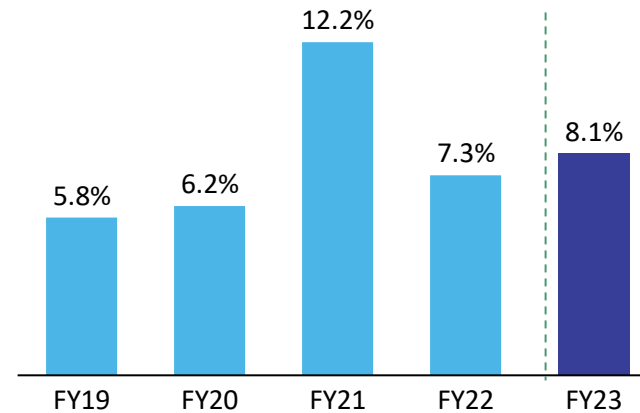
PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)





Genesis

- Established in 1988 as a Joint Venture (JV) company promoted by KBL and Ebara Corporation with a mission to manufacture and supply rotary equipment like process pumps, boiler feed water pumps, steam turbines for mechanical drive and steam turbine generators, etc. required for critical applications in hydrocarbon processing industries and power projects.
- Current Orderbook: Rs. 451 Crores

Product Profile

- **Pumps:**
 - Centrifugal pumps as per API 610
 - Multistage Boiler feedwater pumps
- **Turbines:**
 - API 611 Steam turbines
 - Non-API Saturated Steam Turbine
 - Hydraulic Power Recovery Turbine (HPRT)

Strategy

- ✓ Expand Services offering across the geographies catered
- ✓ Leverage proven track record and approvals with customers to increase the market share
- ✓ Improve margin profile and profitability through cost leadership
- ✓ Maintain the robust order book trajectory

Markets Catered

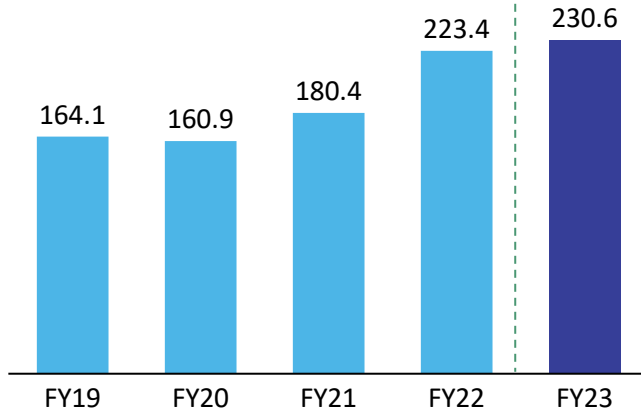
- Indian Subcontinent
- Europe
- CIS Countries
- South-East Asia
- Middle-East

Industries Catered

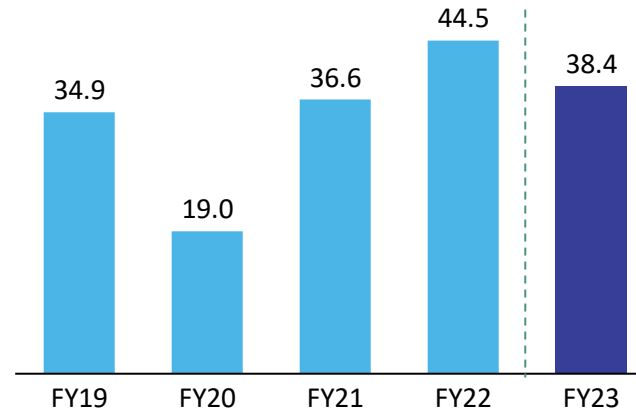
- Oil & Gas (Downstream – Refinery, Pipelines and Depots)
- LPG and LNG Bottling Plants
- Fertilizers
- Power
- Nuclear Energy
- Cogen Power Plants



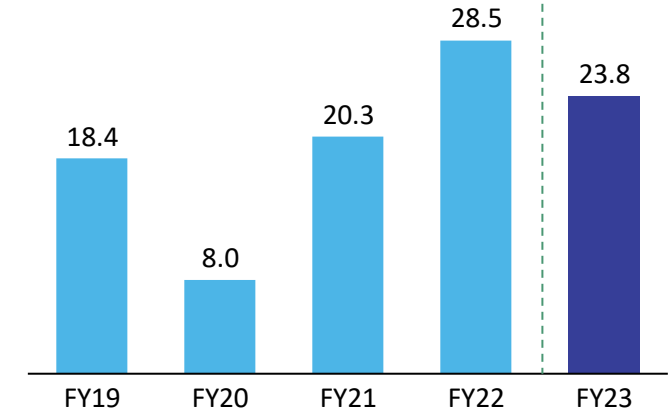
Revenue (Rs. Crores)



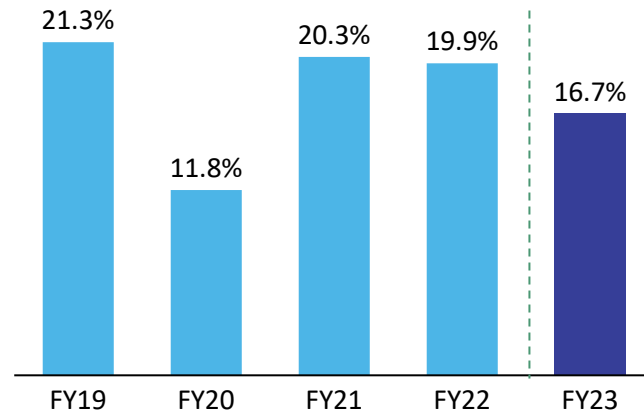
EBITDA (Rs. Crores)



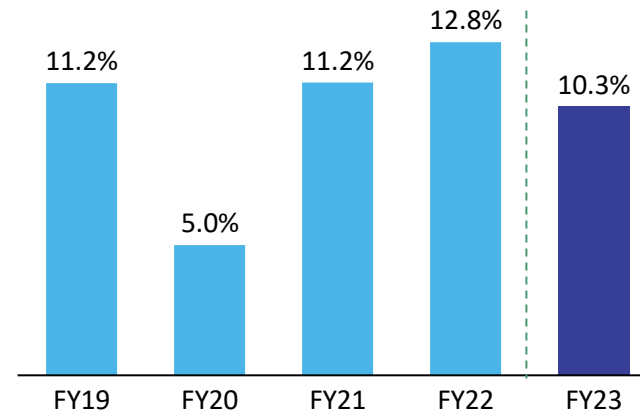
PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)



The Kolhapur Steel Limited (TKSL)



Enriching Lives

Genesis

- Kolhapur Steel Limited (TKSL) is a subsidiary company of KBL.
- Established in the year 1965.
- Steel castings in the weight range of 300 kg-10 tonne single piece casting
- State-of-the-art facility with IBR and NORSOK certifications
- Installed Capacity: 3,600 MTPA

Product Profile

- High Grade Steel Alloy Castings for
- Pumps
- Steel Turbines
- Hydro Turbines
- Valves
- General Engineering



Strategy

- ✓ Reduce the losses
- ✓ Enhance the operations through recently infused capital

Markets Catered

- India
- South Korea

Industries Catered

- Turbomachines
- Shipping & Heavy Engineering
- Earthmoving
- Mining
- Power

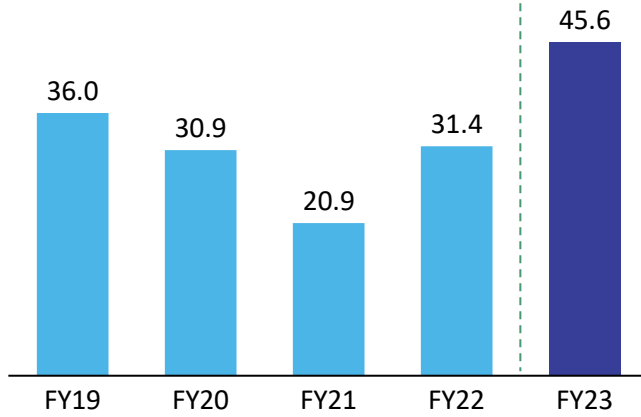


The Kolhapur Steel Limited

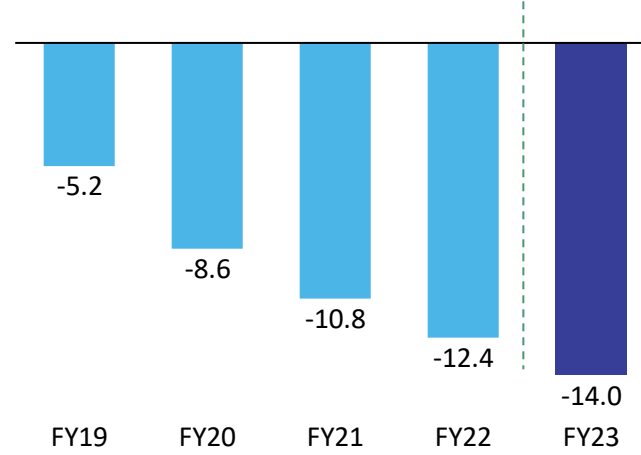


Enriching Lives

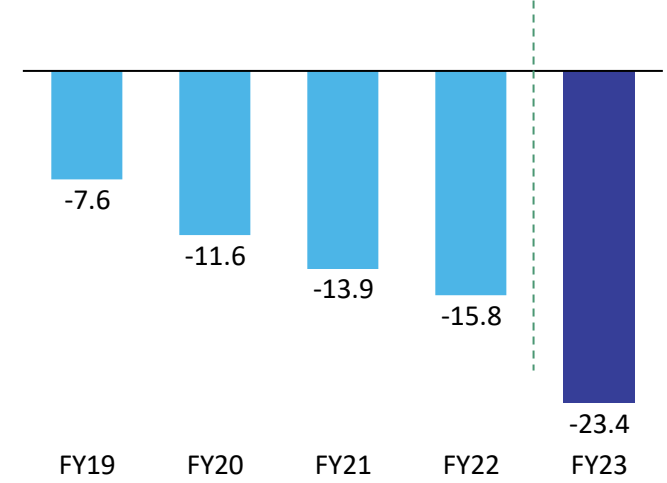
Revenue (Rs. Crores)



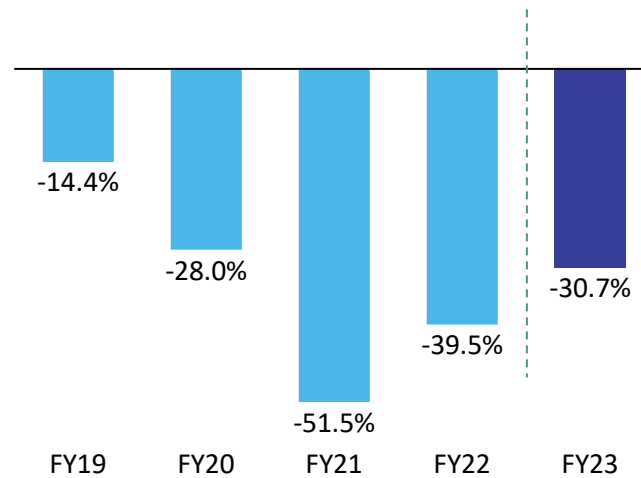
EBITDA (Rs. Crores)



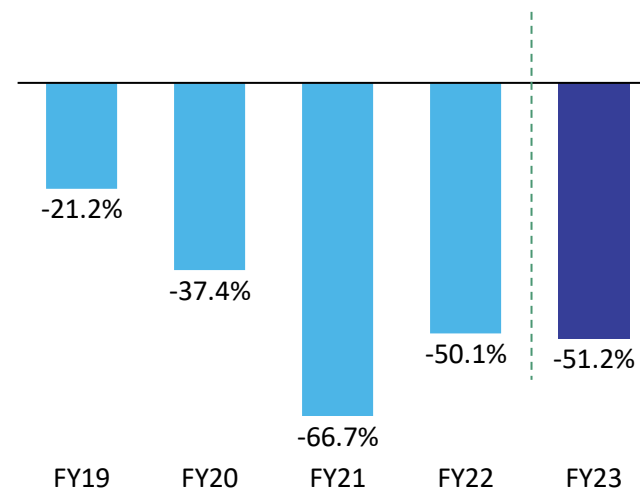
PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)



Note: PAT for FY 23 is after considering exceptional item of Rs. 4.2 Cr.

Kirloskar Corrocoat Private Limited



Enriching Lives

Genesis

- JV between KBL and Corrocoat Ltd. U.K.
- The company manufactures glass flake polymer coatings at its state-of-the-art plant at Kirloskarvadi , Maharashtra.
- Undertakes turnkey projects for supply and application of energy enhancing and anti-corrosion and anti-erosion coatings on a pumps, valves, pipelines and other equipment.

Product Profile

- **Corroglass** - High performance engineering glass flake filled composites
- **Corrocoat** - A range of tailor-made, high performance polymeric solutions for critical service applications
- **Plasmet** - High performance, abrasion-resistant protective coatings and surface-tolerant primers.
- **Fluiglide** - Energy efficiency coatings



Strategy

- ✓ *Product Differentiation – Provide innovative solutions to the customers to enhance efficiency and life of pumps , valves and pipelines*
- ✓ *Developed unique solution to remain ahead of the curve- Innovative product range for Power Sector supported by FGD Regulation and marine anti-corrosion applications*

Markets Catered

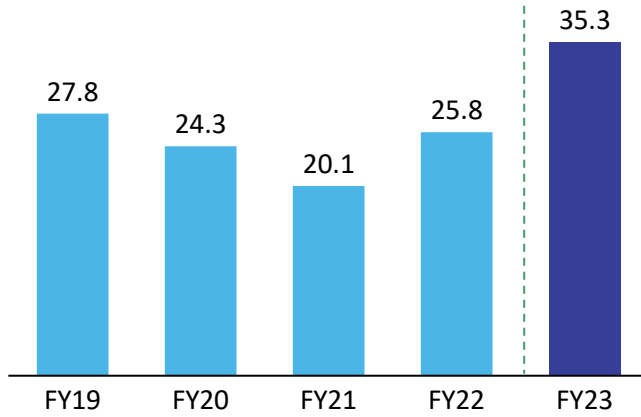
- Pump and Valve Users
- Oil Refineries
- Power plants

Industries Catered

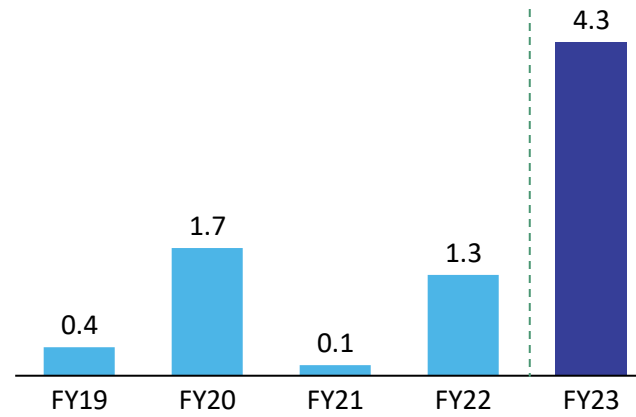
- Oil & Gas
- Petrochemicals
- Power
- Steel
- Water
- Waste Management



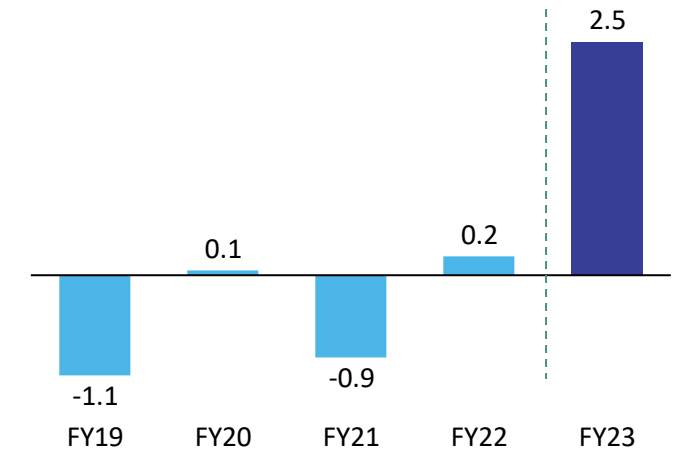
Revenue (Rs. Crores)



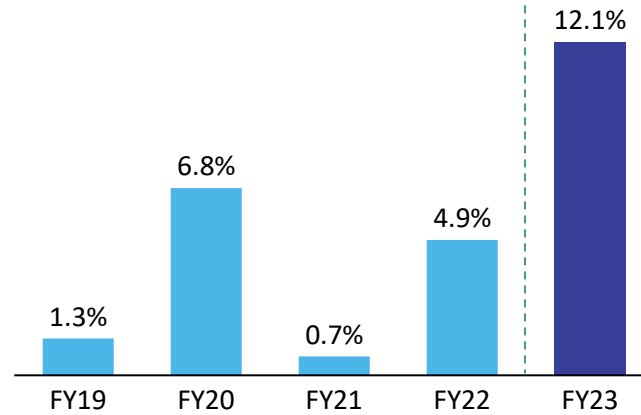
EBITDA (Rs. Crores)



PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)

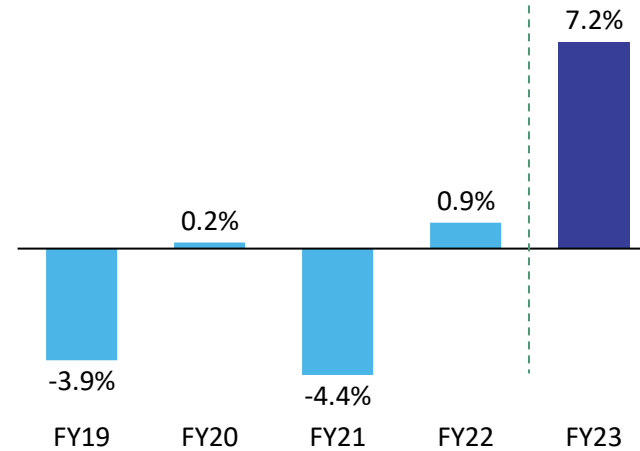


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Notable Projects

Robust Orderbook Implying Strong Revenue Visibility

Sector (In Rs. crores)	Q1 FY24	Q4 FY23	Q3 FY23	Q2 FY23	Q1 FY23
Irrigation + Water Resource Mgmt.	879	851	885	893	664
Power	503	504	473	486	491
Oil & Gas	84	71	86	91	91
Marine & Defence	59	42	53	61	83
Industry	112	102	125	146	137
Building & Construction	106	90	111	118	136
Customer Support & ESD	105	91	103	108	107
Valves	66	69	86	97	68
Total	1,914	1,820	1,922	2,000	1,777

KBL Standalone (In Rs. crores)	Q1 FY24	Q4FY23	Q3FY23	Q2FY23	Q1FY23
Orders Received	656	695	485	814	596
KBL Consolidated (In Rs. crores)	Q1 FY24	Q4FY23	Q3FY23	Q2FY23	Q1FY23
Orders Received	1,157	1,324	1,015	1,267	941
Pending Orders	3,020	2,888	2,845	2,848	2,611

Note:1. Sectoral orderbook is only for standalone business. KBL consolidated Orderbook includes orderbook of all domestic as well as its International companies

Note 2. Pending Orderbook does not include orders for small pump business as this is a made to stock business. Orders received include small pump business orders received and executed in the same month from stock

Q1 FY24 Key Subsidiaries Financials Performance



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Revenue from Operations (Rs. Crores)	Q1FY24	Q1FY23
KBL	581.2	542.4
KCPL	6.0	7.9
TKSL	13.4	8.8
KPML	132.9	147.9
KBIBV (consol.)	315.6	247.2
Subtotal	1049.1	954.2
Elimination/ Consol. adjustment	(149.6)	(170.1)
Total KBL without KEPL (JV Company)	899.5	784.1

Profit before tax (Rs. Crores)	Q1FY24	Q1FY23
KBL	45.1	12.6
KCPL	(0.2)	0.4
TKSL	(4.2)	(5.7)
KPML	21.1	17.6
KBIBV (consol.)	24.6	(2.2)
Subtotal	86.2	22.7
Elimination/ Consol. adjustment	8.7	1.8
Total KBL without KEPL (JV Company)	94.9	24.5

Consolidated Profit & Loss Statement



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Particulars (Rs. Crores)	Q1FY24	Q1FY23	YoY%
Net Revenue from Operations	899.5	784.1	14.7%
Other Income	5.5	7.3	
Materials Consumed	458.4	412.2	
Gross Profit	446.6	379.2	17.8%
Gross Margin (%)	49.6%	48.4%	129bps
Employee Expenses	152.4	131.3	
Other Expenses	178.7	199.8	
EBITDA	115.5	48.1	140.1%
EBITDA Margin (%)¹	12.8%	6.1%	671bps
Finance Costs	7.5	7.3	
Depreciation	18.1	16.3	
Exceptional Item*	-5.0	-	
PBT	94.9	24.5	287.3%
Taxes	28.9	9.3	
Share in JV Profit	(2.4)	0.3	
Reported PAT	63.6	15.5	310.3%
PAT Margin (%)¹	7.1%	2.0%	509bps
Earnings Per Share (EPS)	8.02	1.94	

1. EBITDA & Reported PAT margin is % to Revenue from Operations

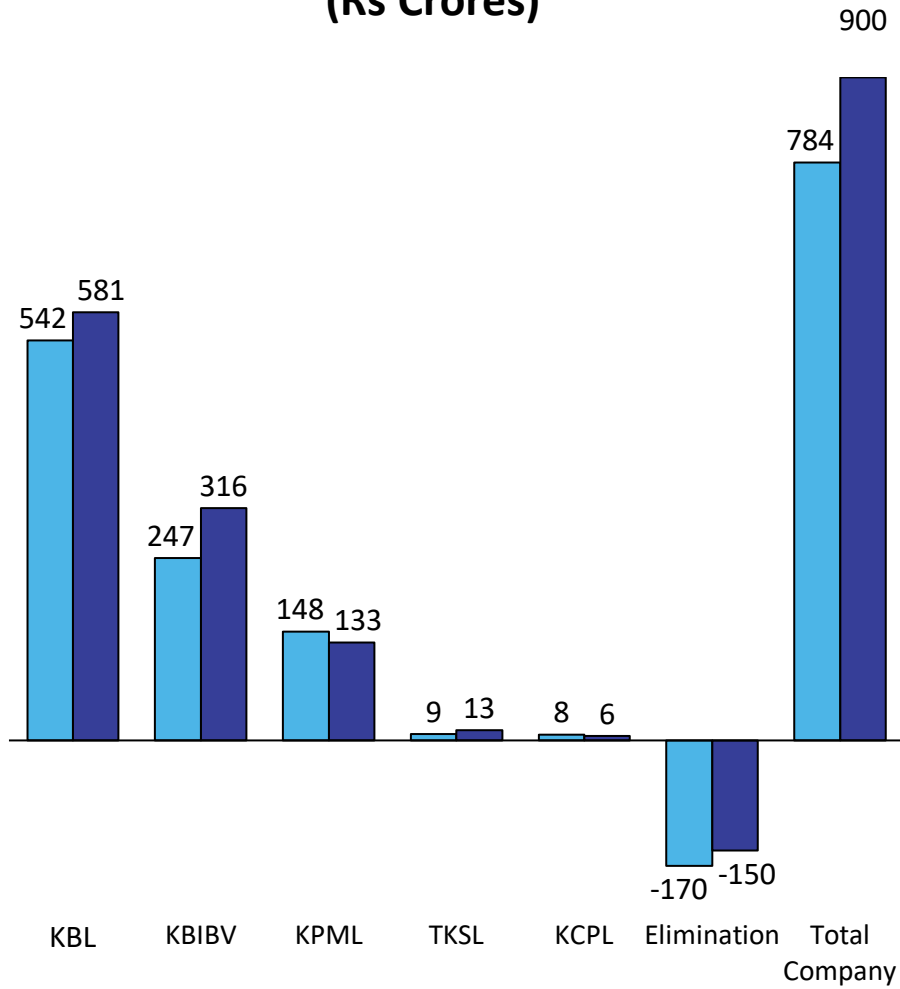
* Represents net credit amount of reversal of project related provisions and credit on sales tax related provisions of earlier period in respect of company's subsidiary 'Karad Projects and Motors Limited'.

KBL Group's Revenue breakup

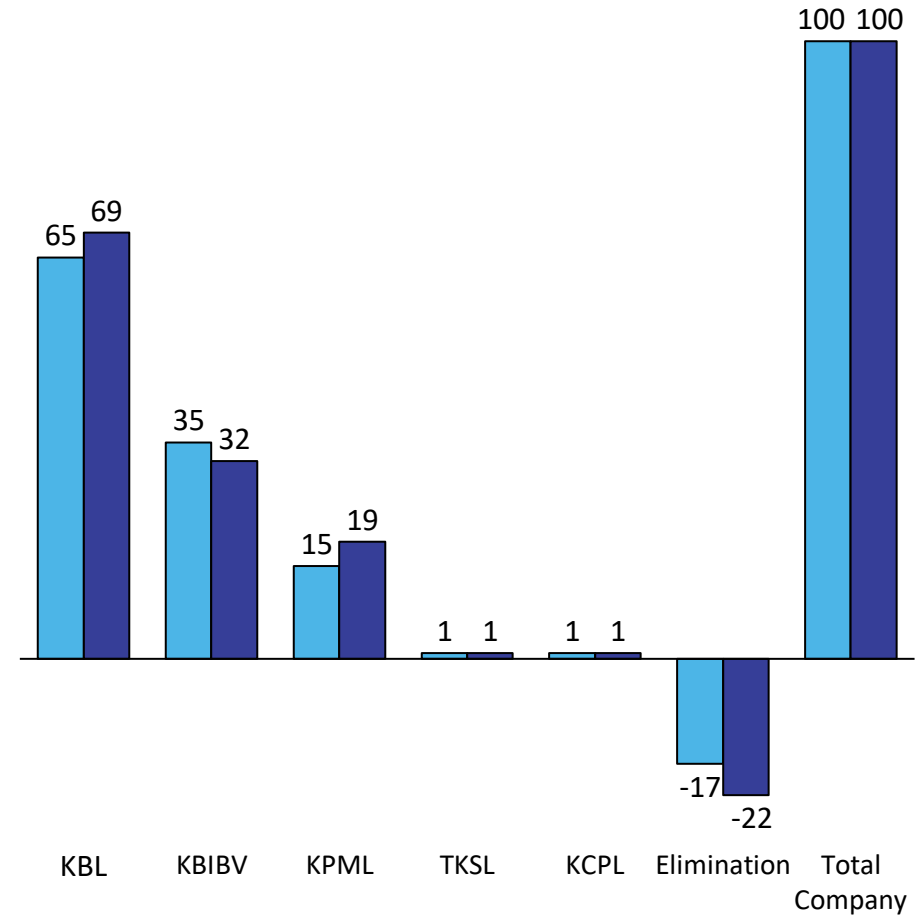


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KBL Group's Revenue Breakup (Rs Crores)



KBL Group's Revenue % Breakup



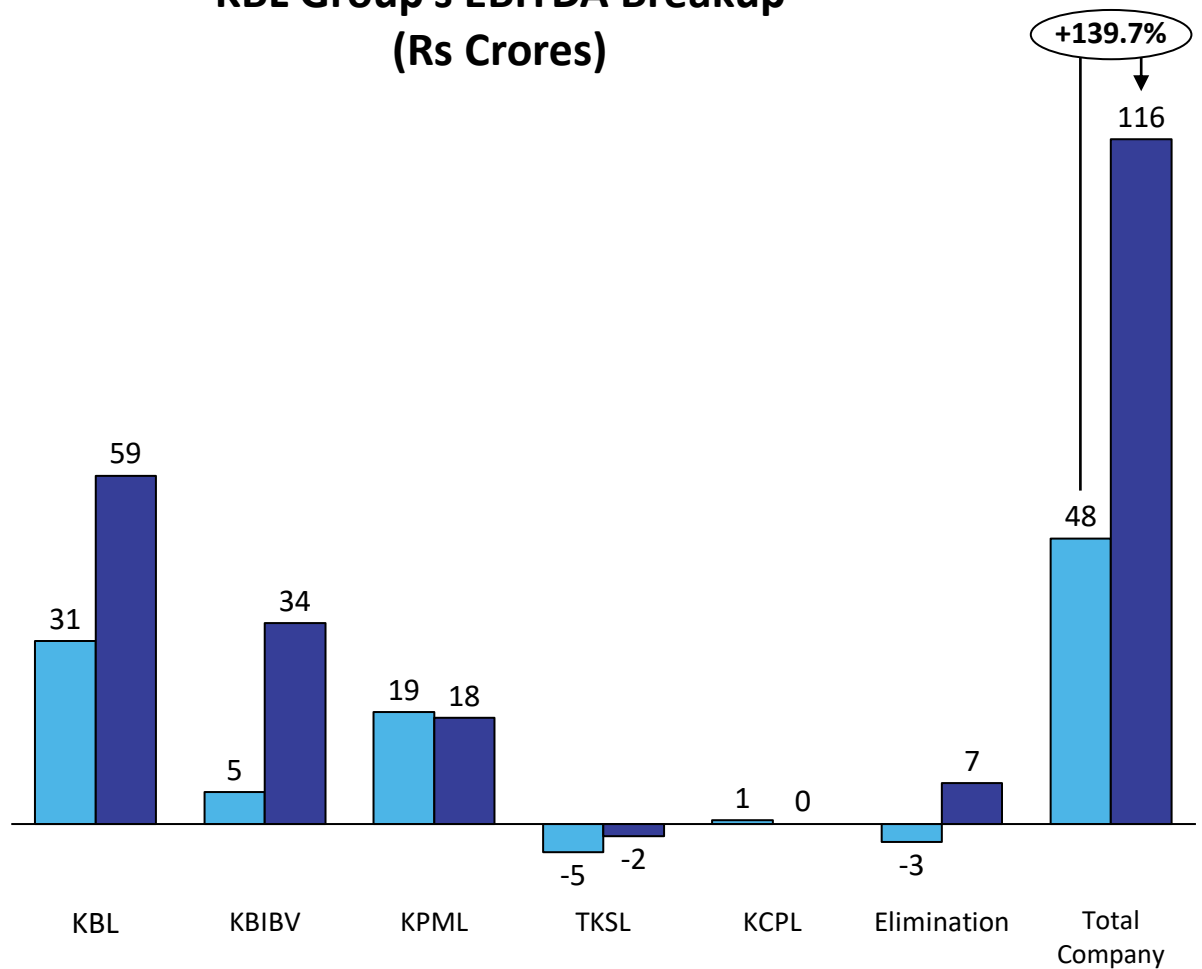
Q1 FY23 Q1 FY24

KBL Group's EBITDA % Breakup

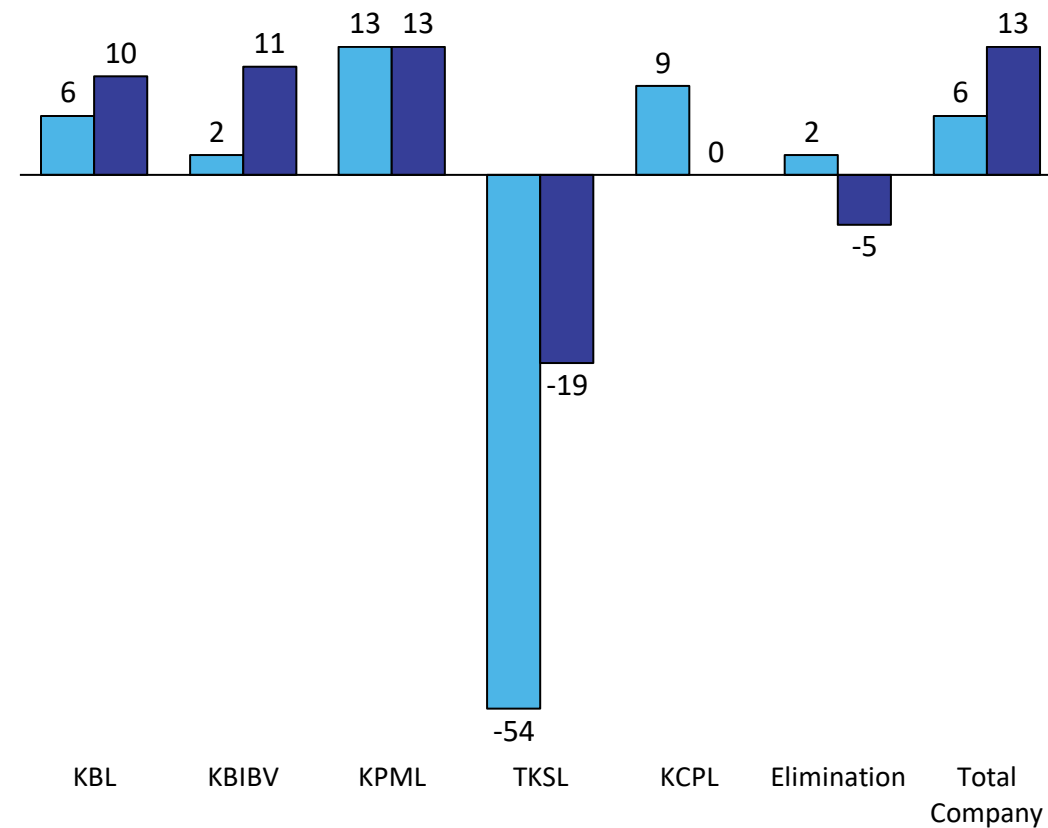


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KBL Group's EBITDA Breakup (Rs Crores)



EBITDA % of respective company



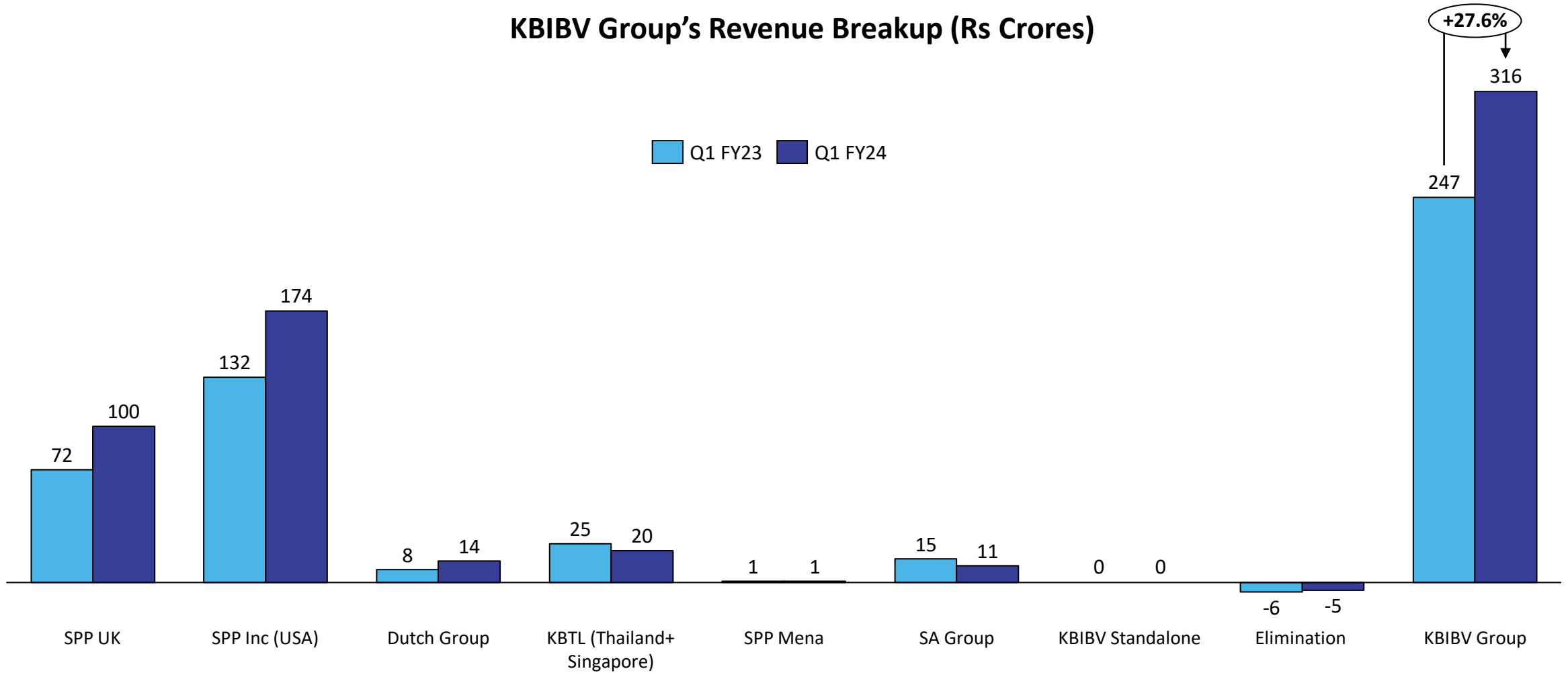
Q1 FY23 Q1 FY24

KBIBV's Revenue Breakup



Enriching Lives

KBIBV Group's Revenue Breakup (Rs Crores)



KBIBV's EBITDA Breakup



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KBIBV Group's EBITDA (Rs Crores) and as % of sales

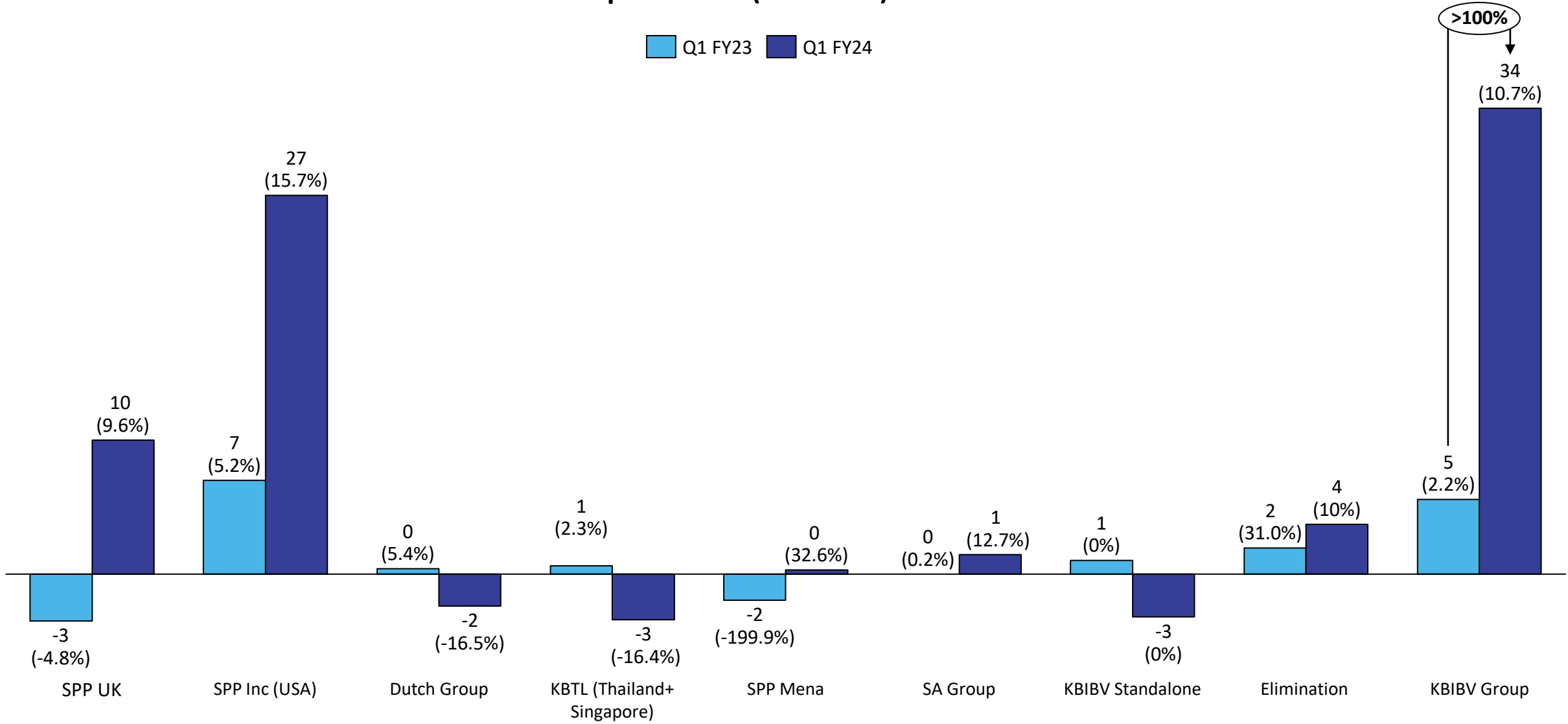


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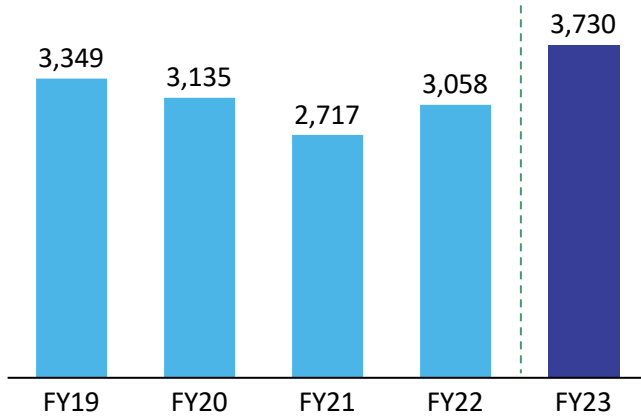
Notable Projects

Historical Financial Performance - Consolidated

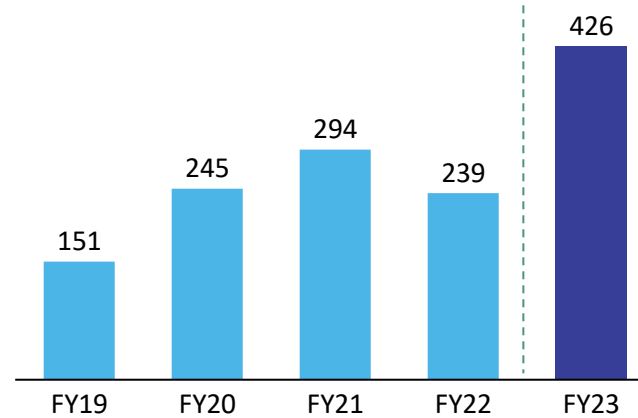


Enriching Lives

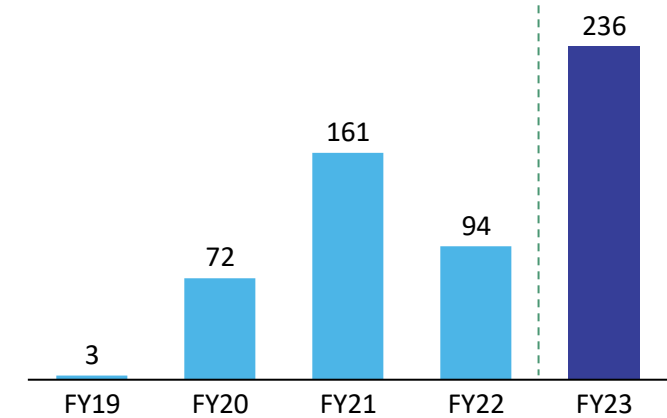
Revenue (Rs. Crores)



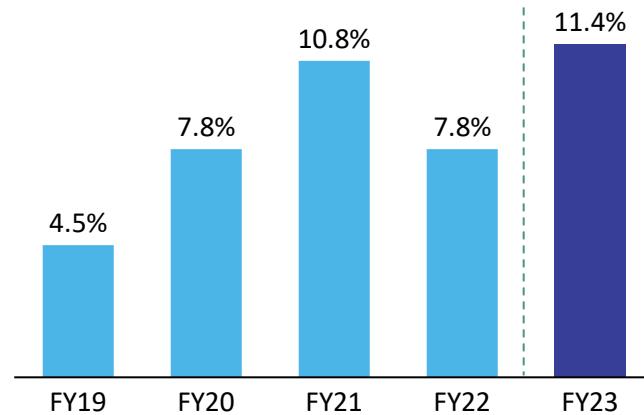
EBITDA (Rs. Crores)



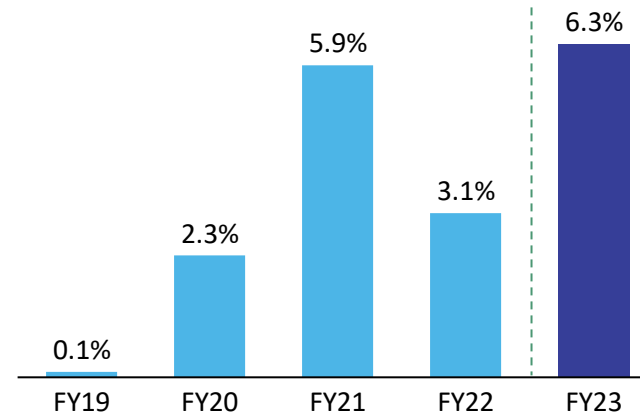
PAT (Rs. Crores)



EBITDA Margin (%)



PAT Margin (%)

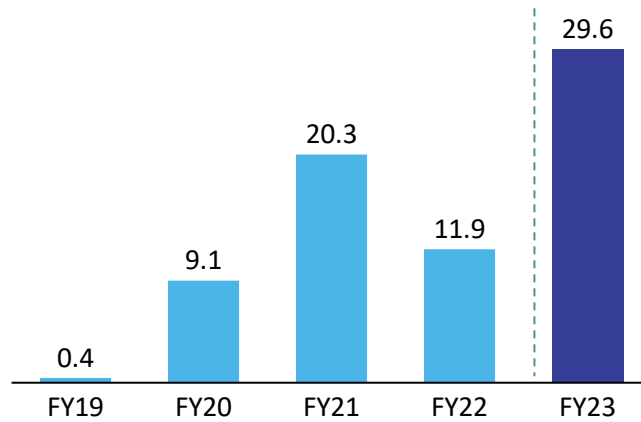


Historical Financial Performance - Consolidated

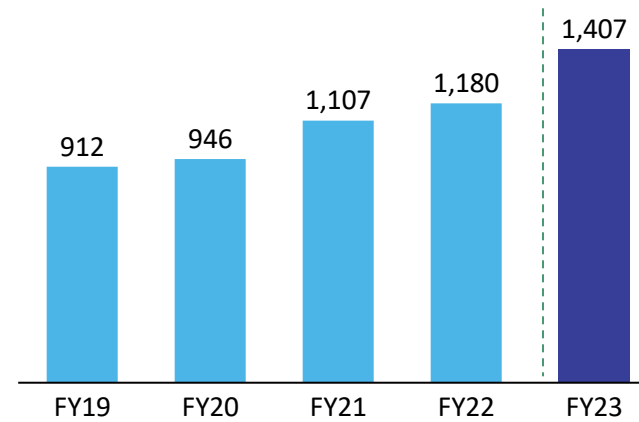


Enriching Lives

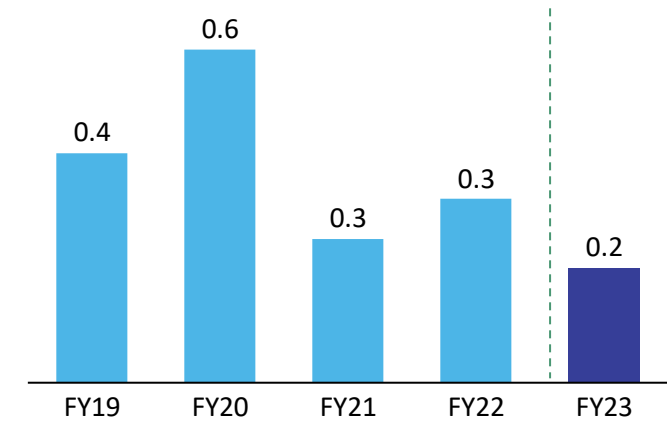
EPS (in Rs.)



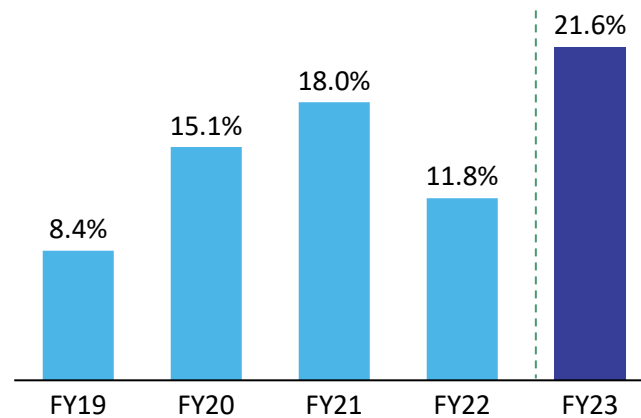
Net Worth (Rs. Crores)



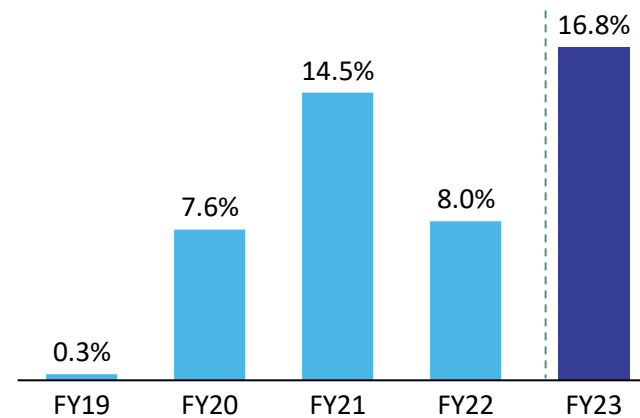
Leverage (X)



RoCE (%)



RoE (%)



Consolidated Profit & Loss Statement



Enriching Lives

Particulars (Rs. Crores)	FY23	FY22	FY21	FY20	FY19	FY18
Net Revenue from Operations (Net of Excise)	3,730.2	3,057.6	2,716.5	3,135.4	3,349.0	2,775.4
Other Income	27.3	32.4	53.8	37.6	23.7	21.9
Materials Consumed	1,954.7	1,680.3	1,449.5	1,641.9	1,829.8	1,456.8
Gross Profit	1,802.8	1,409.7	1,320.8	1,531.1	1,542.9	1,340.5
Gross Margin (%)	48.3%	46.1%	48.6%	48.8%	46.1%	48.3%
Employee Expenses	565.1	501.5	488.8	531.1	583.8	477.8
Other Expenses	811.3	669.7	537.7	755.4	807.7	690.9
EBITDA	426.4	238.5	294.3	244.6	151.4	171.8
EBITDA Margin (%)¹	11.4%	7.8%	10.8%	7.8%	4.5%	6.2%
Finance Costs	35.4	33.5	44.2	52.1	47.0	39.9
Depreciation	68.6	69.5	68.0	71.2	63.8	58.6
Exceptional Item	4.2	0.0	0.0	0.0	0.0	0.0
Profit Before Tax (PBT)	318.2	135.5	182.1	121.3	40.6	73.3
Taxes	93.1	54.0	28.2	53.0	45.8	26.8
Profit After Tax (PAT)	225.1	81.5	153.9	68.3	-5.3	46.5
Share in profit of joint venture company	10.7	12.8	6.8	3.6	8.4	3.5
PAT after profit of joint venture company	235.8	94.3	160.7	71.9	3.1	50.0
PAT Margin (%)¹	6.3%	3.1%	5.9%	2.3%	0.1%	1.8%
Earnings Per Share (EPS)	29.59	11.88	20.29	9.05	0.44	6.22

1. EBITDA & Reported PAT margin is % to Revenue from Operations

Consolidated Balance Sheet Statement



Enriching Lives

Particulars (Rs. Crores)	FY23	FY22	FY21	FY20	FY19
Equity					
Equity Share capital	15.9	15.9	15.9	15.9	15.9
Other Equity	1,388.1	1,161.5	1,088.8	927.2	893.4
Non Controlling Interest	3.4	2.6	2.5	2.9	2.9
Total Equity	1407.4	1,180.0	1,107.2	946.0	912.2
Financial liabilities					
(i) Borrowings	110.9	136.4	84.0	117.0	62.2
(ii) Other Financial liabilities	16.2	15.1	9.7	21.5	1.2
(iii) Trade Payables	8.0	7.5	9.0	10.3	15.7
Other non current Liability	70.3	68.8	21.5	24.5	25.7
Deferred tax liabilities (Net)	-	-	-	-	-
Provisions	27.5	25.9	24.6	25.7	27.1
Total Non Current Liabilities	232.9	253.7	148.8	199.0	132.0
Financial liabilities					
(i) Borrowings	141.8	238.8	216.5	432.9	301.0
(ii) Trade Payables	617.7	591.1	549.8	535.0	675.1
(iii) Other financial liabilities	186.2	155.0	228.3	249.0	159.4
Provisions	83.9	74.0	55.3	62.7	61.5
Other current liabilities	339.7	369.7	408.7	423.2	424.6
Current tax liabilities (Net)	6.1	-	-	-	-
Total Current Liabilities	1,375.5	1,428.6	1,458.6	1,702.8	1,621.7
Total Equity and Liabilities	3015.8	2,862.3	2,714.6	2,847.8	2,665.9

Particulars (Rs. Crores)	FY23	FY22	FY21	FY20	FY19
Non Current assets					
Property, Plant and Equipment	481.4	487.0	428.4	429.4	433.6
Capital work in progress	81.3	26.7	72.9	50.8	24.8
Intangible assets	4.8	3.7	5.4	6.8	6.4
Right to use assets	30.6	27.4	30.2	48.4	0.0
Goodwill	14.4	13.9	14.1	14.2	14.1
Investment Property	0.7	0.2	2.5	2.5	2.5
Financial Assets					
(i) Investments	88.5	79.7	68.0	59.3	57.4
(ii) Loans	0.0	0.0	0.0	9.8	13.3
(iii) Trade Receivables	57.4	39.0	59.6	64.5	17.1
(iv) Others	16.9	25.4	16.6	5.6	4.3
Deferred Tax Assets (net)	40.8	41.8	47.2	32.0	45.5
Other non-current assets	69.7	103.7	103.7	96.4	111.3
Total Non Current Assets	889.0	848.5	848.6	819.7	730.3
Current Assets					
Inventories	714.0	643.5	602.8	615.7	616.7
Financial Assets					
(i) Trade receivables	488.4	515.2	463.7	489.7	609.7
(ii) Cash and Cash Equivalents	221.3	134.1	173.5	317.0	58.4
(iii) Other Bank balances	31.6	29.8	1.9	3.9	15.1
(iv) Investments	226.7	253.4	126.8	45.0	0.0
Current Tax Assets(Net)	5.7	9.3	6.6	6.2	3.3
Other financial assets incl. Loans	103.5	86.7	100.2	102.8	96.8
Other current assets	335.5	341.8	390.5	447.8	535.5
Total Current Assets	2,126.8	2,013.9	1,866.0	2,028.1	1,935.5
Total Assets	3,015.8	2,862.3	2,714.6	2,847.8	2,665.9

Consolidated Cash Flow Statement



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Particulars (Rs. Crores)	FY23	FY22	FY21	FY20	FY19
Profit Before Taxes	318.2	135.5	182.1	121.3	40.6
Changes in working capital	80.8	18.8	170.1	219.9	39.6
Cash generated from operations	399.0	154.3	352.2	341.2	80.2
Direct taxes paid (net of refund)	67.4	41.4	35.8	36.0	18.2
Net Cash from Operating Activities	331.6	112.9	316.4	305.2	62.0
Net Cash from Investing Activities	(75.4)	(181.9)	(143.9)	(171.2)	(57.1)
Net Cash from Financing Activities	(169.3)	29.8	(315.3)	125.1	(23.4)
Net Increase in cash and cash equivalents	86.9	(39.1)	(143.5)	258.6	(18.6)
Add: Cash & Cash equivalents at the beginning of the period	134.4	173.5	317.0	58.4	77.0
Cash & Cash equivalents at the end of the period	221.3	134.4	173.5	317.0	58.4

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Notable Projects

Notable Work – Building & Construction



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KBL's pumping solutions are operational in many of the world's iconic buildings



The Shard, UK

Hong Kong-Zhuhai-Macau Bridge

Marina Bay Sands, Singapore

Atal Tunnel, India

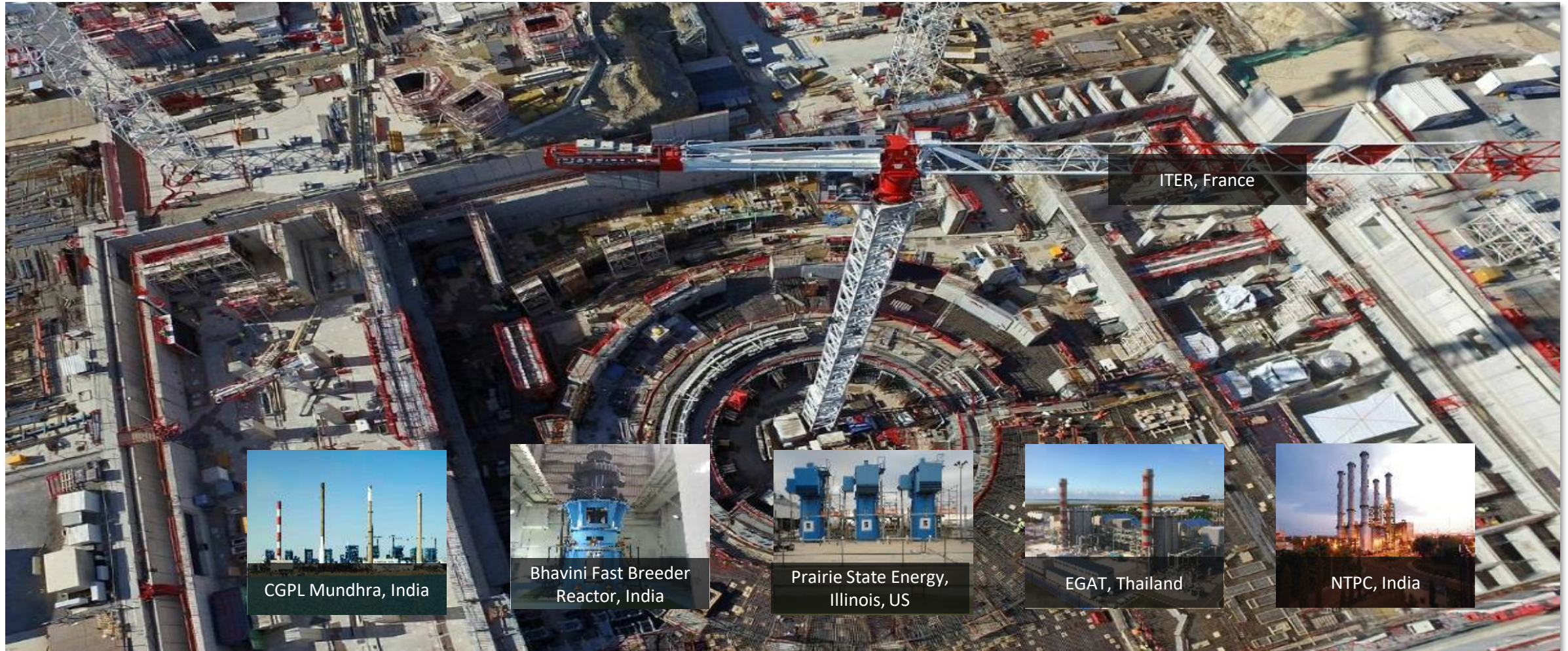
Statue of Unity, India

Notable Projects – Power



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KBL is the first and leading manufacturer of critical pumps for nuclear power in India. Supplied primary and secondary sodium pump to Bhavini and specialised pump sets for the ITER (International Thermonuclear Experimental Reactor) project in France, the world's largest magnetic confinement plasma physics experiment.



ITER, France



CGPL Mundhra, India



Bhavini Fast Breeder Reactor, India



Prairie State Energy, Illinois, US



EGAT, Thailand

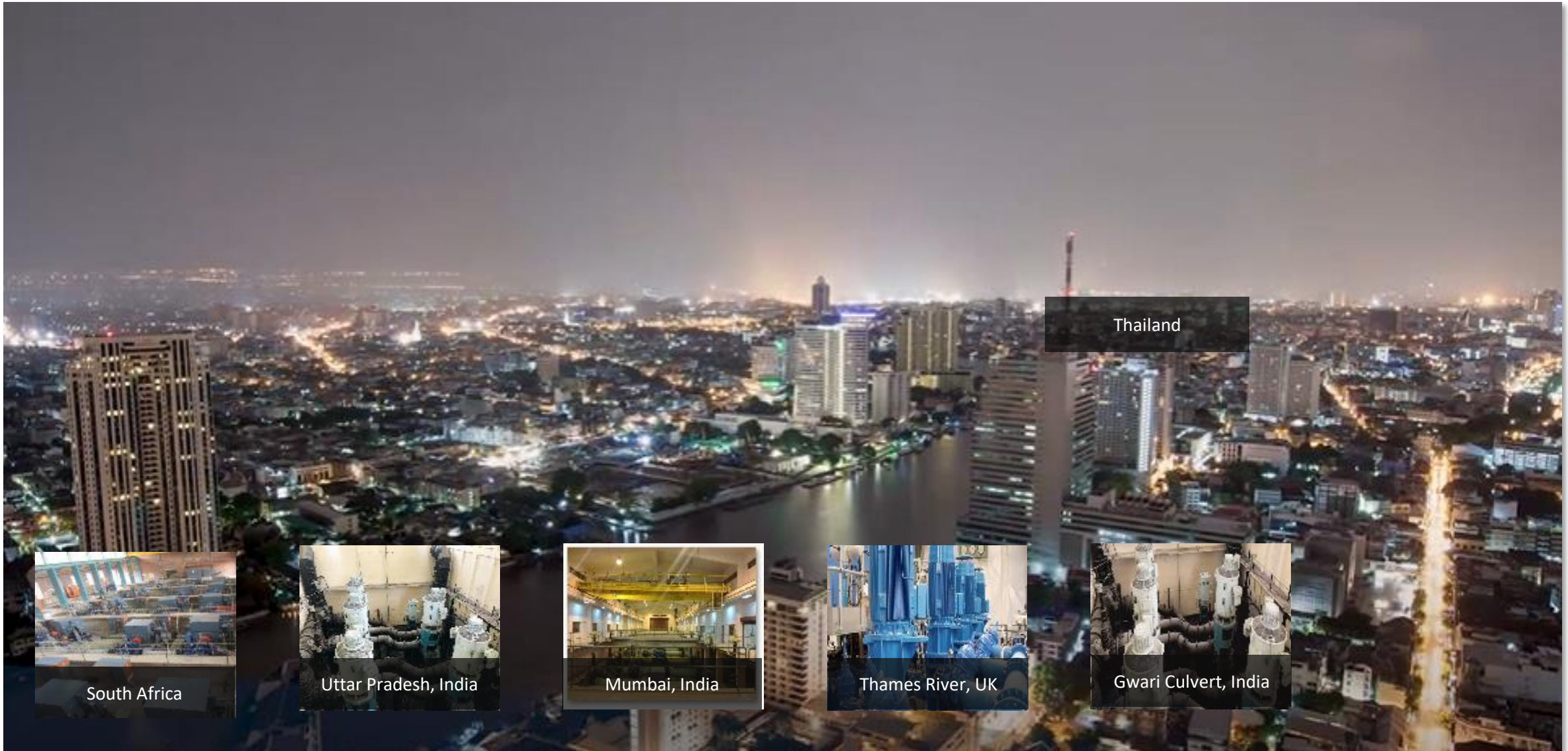


NTPC, India

Notable Projects – Municipal Water



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Thailand

South Africa

Uttar Pradesh, India

Mumbai, India

Thames River, UK

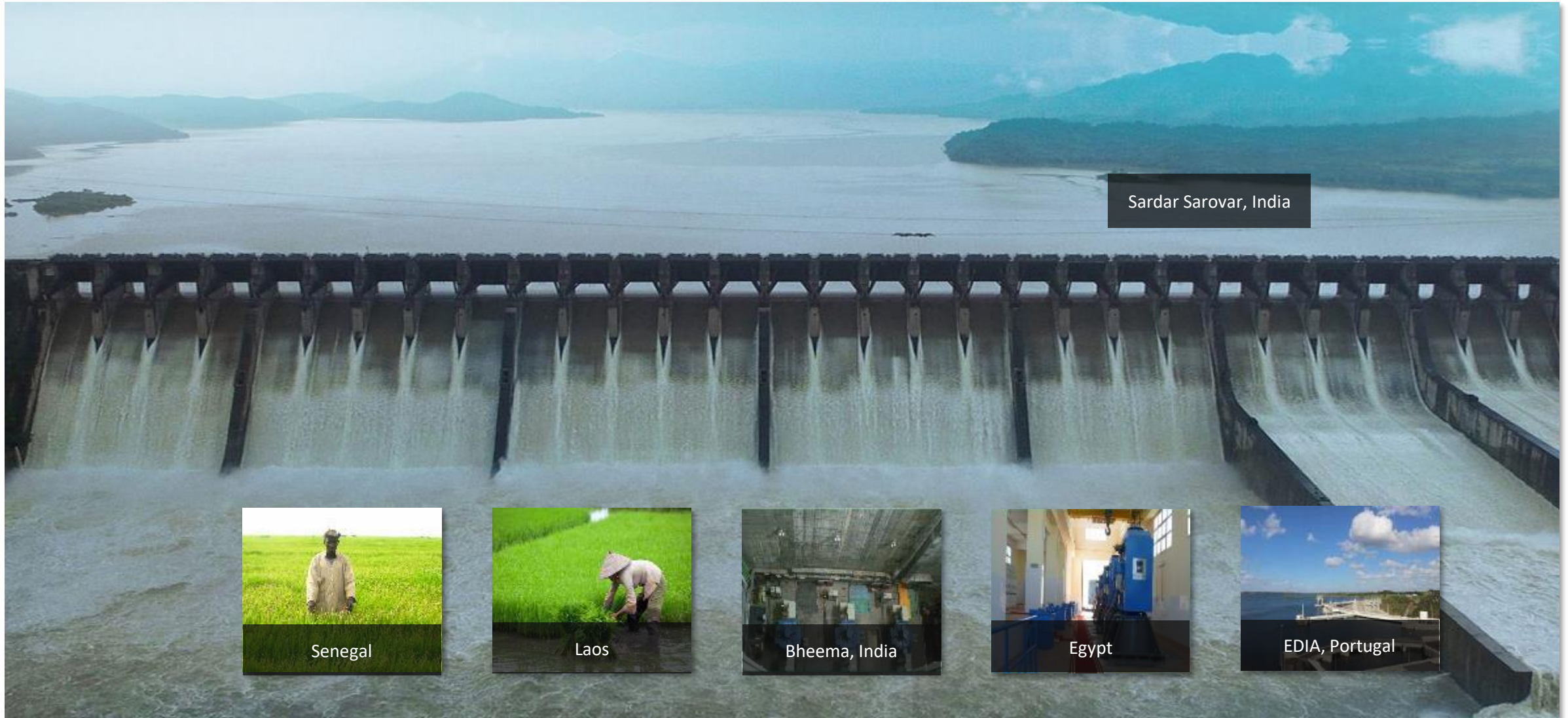
Gwari Culvert, India

Notable Projects – Irrigation



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KBL's irrigation solutions are operational across the world



Sardar Sarovar, India



Senegal



Laos



Bheema, India



Egypt



EDIA, Portugal

For further information, please contact

Company



Enriching Lives

CIN: L29113PN1920PLC000670

Mr. Chittaranjan Mate

Email: Chittaranjan.Mate@kbl.co.in

www.kirloskarpumps.com

Investor Relations Advisor

SGA Strategic Growth Advisors

CIN: U74140MH2010PTC204285

Ms. Ami Parekh / Mr. Jigar Kavaiya

E: ami.parekh@sgapl.net / jigar.kavaiya@sgapl.net

T: +91 8082466052 / +91 9920602034

www.sgapl.net