



8th March, 2021

BSE Limited
P J Towers,
Dalal Street,
Mumbai – 400001

National Stock Exchange of India Limited
Exchange plaza,
Bandra-Kurla Complex,
Bandra (E), Mumbai – 400051

Scrip Code: 512599

Scrip Code: ADANIENT

Dear Sir,

Sub: Intimation for participation in the Investors' Conference / Webinar

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we hereby inform that the Company will participate in the conference as per details given hereunder through Video Conferencing / Other Audio-Visual Means:

Day & Date	Particulars
Tuesday, 9 th March, 2021	Bank of America, India Virtual Conference, 'Private Companies' (Presentation on Adani Airports and Mining Services Business)

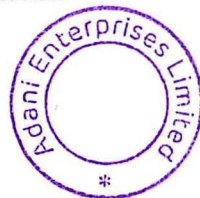
Presentation for the said conference is enclosed herewith and also being uploaded on website of the Company www.adanienterprises.com.

You are requested to take the same on your records.

Thanking you,

Yours faithfully,
For **Adani Enterprises Limited**

J. A. Jalundhwala
Jatin Jalundhwala
Company Secretary &
Joint President (Legal)



Encl: as above

Adani Enterprises Ltd
"Adani Corporate House",
Shantigram, Near Vaishno Devi Circle,
S. G. Highway, Khodiyar
Ahmedabad 382 421
Gujarat, India
CIN: L51100GJ1993PLC019067

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info@adani.com
www.adani.com

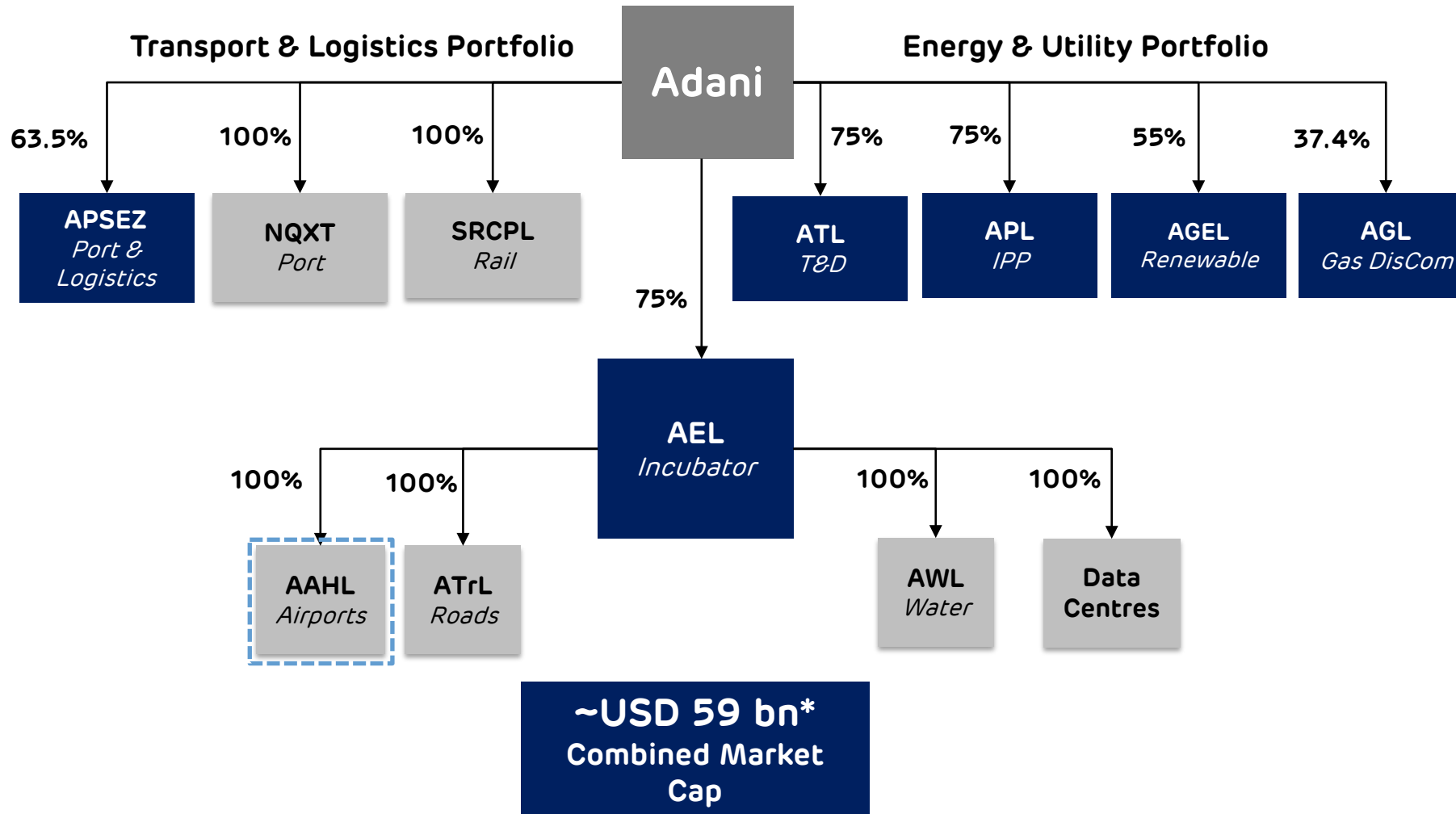
adani

Adani Airports Equity Note – March 2021





Adani Group



- **Marked shift from B2B to B2C businesses**
 - **ATGL** – Gas distribution network to serve key geographies across India
 - **AEML** – Electricity distribution network that powers the financial capital of India
 - **Adani Airports** – To operate, manage and develop six airports in the country
- **Locked in Growth 2020**
 - Transport & Logistics - Airports and Roads
 - Energy & Utility – Water and Data Centre

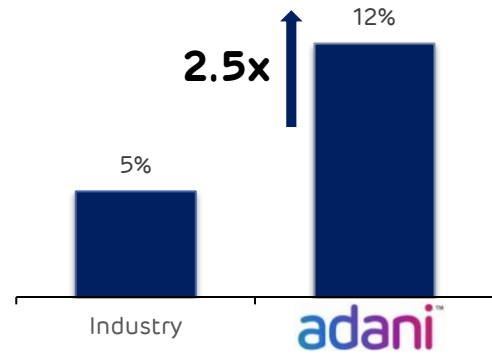
Opportunity identification, development and beneficiation is intrinsic to diversification and growth of the group.

1. North Queensland Export terminal
 Blue colour represent public traded listed vertical * As on Jan 29,2021 USD/INR – 73| Note - Percentages denote promoter holding

ADANI- Decades long track record of industry best growth rates across sectors



Port Cargo Throughput (MT)



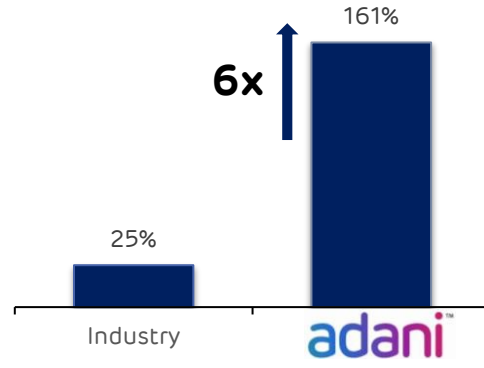
2014	972 MT	113 MT
2020	1,339 MT	223 MT



APSEZ

Highest Margin among Peers globally
EBITDA margin: 70%^{(1),(2)}
 Next best peer margin: 55%

Renewable Capacity (GW)



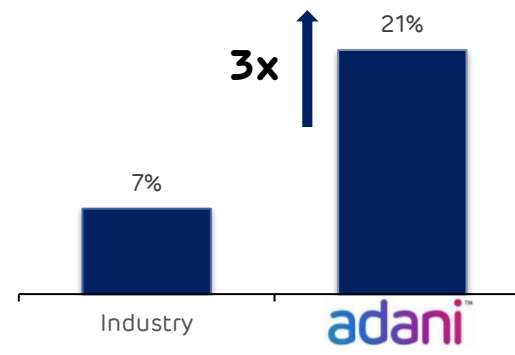
2016	46 GW	0.3 GW
2020	114 GW	14.2 GW ⁽⁶⁾



AGEL

World's largest developer
EBITDA margin: 89%^{(1),(4)}
 Next best peer margin: 53%

Transmission Network (ckm)



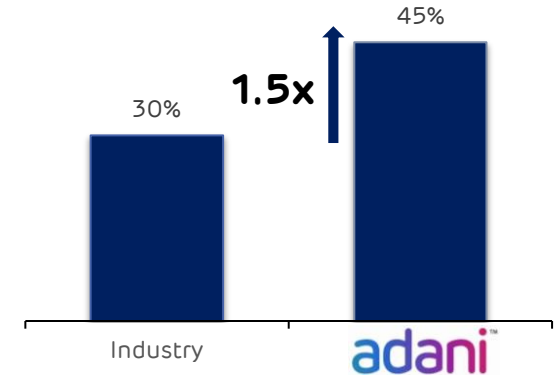
2016	320,000 ckm	6,950 ckm
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ATL

Highest availability among Peers
EBITDA margin: 92%^{(1),(3),(5)}
 Next best peer margin: 89%

CGD⁽⁷⁾ (GAs⁽⁸⁾) covered



2015	62 GAs	6 GAs
2020	228 GAs	38 GAs



ATGL





India's Largest private CGD business
EBITDA margin: 31%⁽¹⁾
 Among the best in industry

Transformative model driving scale, growth and free cashflow

Note: ⁽¹⁾Data for FY20; ⁽²⁾Margin for ports business only, Excludes forex gains/losses; ⁽³⁾ EBITDA = PBT + Depreciation + Net Finance Costs – Other Income; ⁽⁴⁾ EBITDA Margin represents EBITDA earned from power sales and exclude other items; ⁽⁵⁾ EBITDA margin of transmission business only, does not include distribution business. ⁽⁶⁾ Contracted & awarded capacity ⁽⁷⁾ CGD – City Gas distribution GAs ⁽⁸⁾ Geographical Areas - Including JV

ADANI - repeatable, robust & proven model to deliver RoE



Phase	Development			Operations	Post Operations
	Origination	Site Development	Construction	Operation	Capital Management
Activity	<ul style="list-style-type: none"> Analysis & market intelligence Viability analysis Strategic value 	<ul style="list-style-type: none"> Site acquisition Concessions and regulatory agreements Investment case development 	<ul style="list-style-type: none"> Engineering & design Sourcing & quality levels Equity & debt funding at project 	<ul style="list-style-type: none"> Life cycle O&M planning Asset Management plan Tech enabled O&M 	<ul style="list-style-type: none"> Redesigning the capital structure of the asset Operational phase funding consistent with asset life Strategic Partnerships (TOTAL, QIA)
Performance	<ul style="list-style-type: none"> Redefining the space -eg Mundra Port 	<ul style="list-style-type: none"> Envisaging evolution of sector eg Adani Transmission 	<ul style="list-style-type: none"> Complex developments on time & budget eg APL 	<ul style="list-style-type: none"> O&M optimization eg. Solar plants 	<p>Successfully placed 7 issuances totalling ~USD 4Bn in FY20</p> <p>All listed entities maintain liquidity cover of 1.2x- 2x for FY21</p> <p>Focus on liquidity planning ensures remaining stress free</p>

Low capital cost, time bound & quality completion providing long term stable cashflow & enhanced RoE

Key Business Model Attributes

Successfully applied across Infrastructure & Utility platform

✓ **Development at large scale & within time and budget**

India's Largest Commercial Port	Longest Private HVDC Line in Asia	648 MW Ultra Mega Solar Power Plant	Largest Single Location Private Thermal IPP
--	--	--	--

✓ **Excellence in O&M – benchmarked to global standards**

APSEZ	ATL	AGEL	APL
Highest Margin among Peers in the World	Highest availability among Peers	Constructed and Commissioned in 9 months	High declared capacity of 89%⁽⁵⁾
EBITDA margin: 70%^{(1),(2)}	EBITDA margin: 91%^{(1),(3)}	EBITDA margin: 89%^{(1),(4)}	

✓ **Diverse financing sources – only Indian infrastructure portfolio with four (4) Investment Grade (IG) issuers**



MIAL will benefit from the above business model attributes

Note: ⁽¹⁾ Data for FY20; ⁽²⁾ Excludes forex gains/losses; ⁽³⁾ EBITDA = PBT + Depreciation + Net Finance Costs – Other Income; ⁽⁴⁾ EBITDA Margin represents EBITDA earned from power sales and exclude other items, ⁽⁵⁾ FY20 data for commercial availability declared under long term power purchase

Large scale integrated business platform

Airports portfolio currently handling ~ **25% of Indian air traffic**
Consumer base of ~**300+**⁽¹⁾ Mn

Infrastructure built considering **future technology** along with blending of **local flavors**

End to end integration in select business for value enhancement

Customer orientation

Committed to **best ASQ ratings** in respective categories

Address pain-points to **redefine passenger experience** on immediate basis

Creating an **experience** for **consumer attraction**

Capital and Risk Management Plan

Asset sweating with focus on **efficiency, innovation** and **safety**

Hardening of assets assuring the highest **reliability** and **affordability**

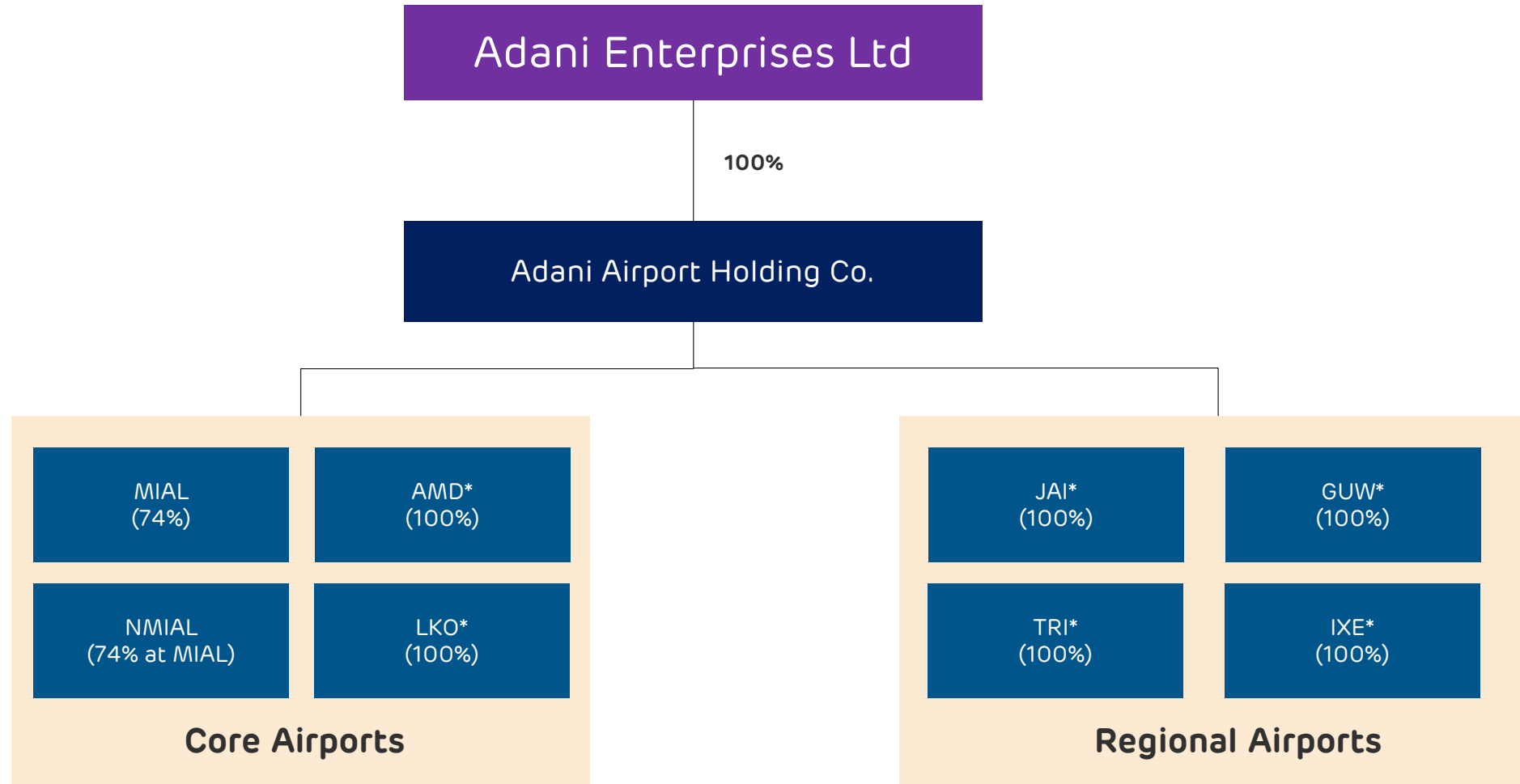
Reset of capital structure upon stability

⁽¹⁾ 80 million airport passengers, 220+ Million non-passengers

2

Adani Airports - Platform Overview

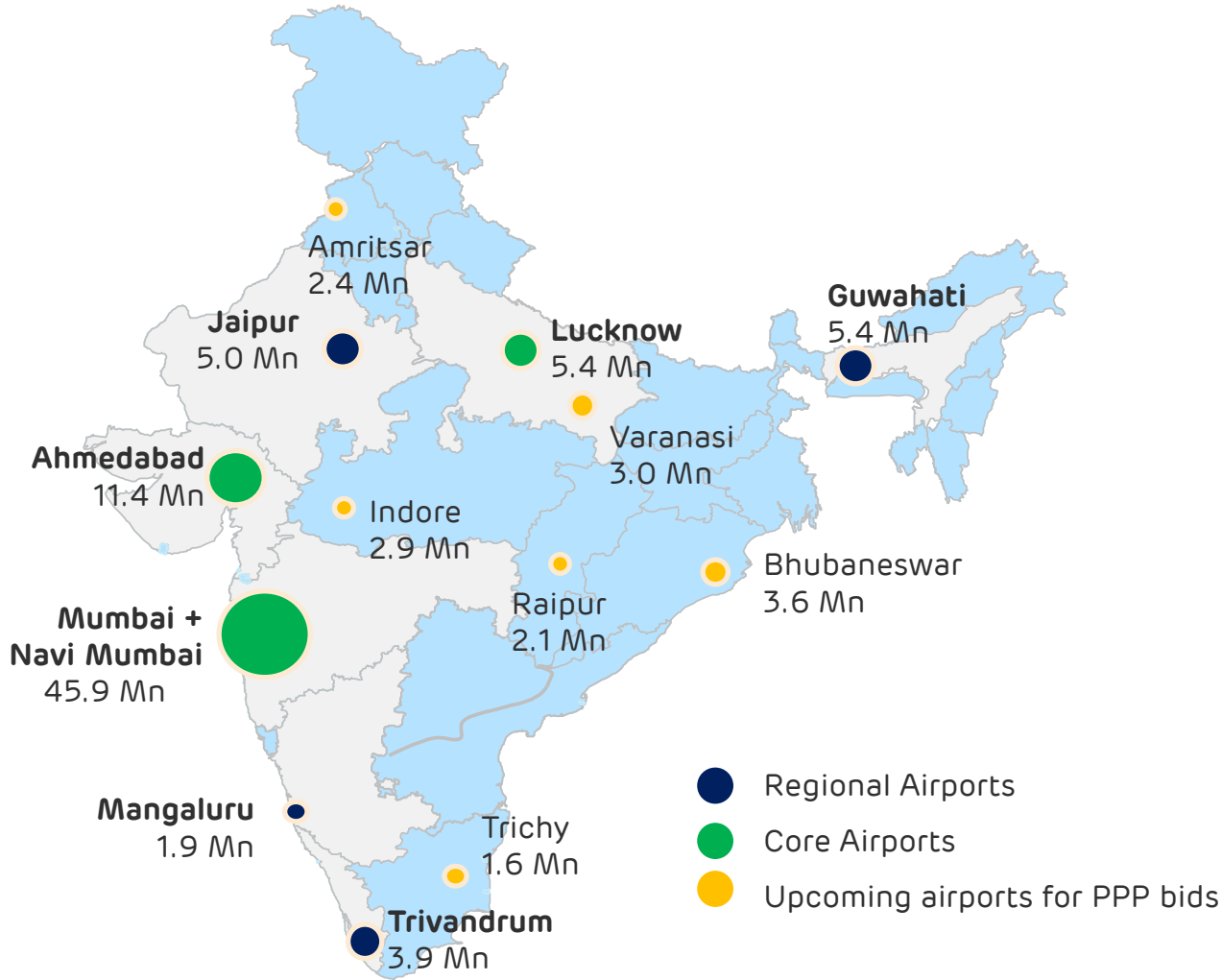
Adani Airports - Holding Structure



AMD – Ahmedabad; LKO – Lucknow; IXE – Mangaluru; GUV – Guwahati; JAI – Jaipur; TRI – Trivandrum
MIAL – Mumbai International Airport Ltd; NMIAL – Navi Mumbai International Airport Ltd.

*Current holding AEL-84.5%, AAHL-14.5% in SPV. Bal. will be transferred post regulatory approvals.

Adani Airports – Portfolio Overview



Network Effect

Platform	Integrated
International Gateway + Regional Network	Multi modal transport hub City-center airports

Audience of One - Consumer Segments

Passengers	
80 Mn	60 Mn – Domestic
	20 Mn - International

Non Passengers	
200 Mn	160 Mn - Meet / Greeters
	40 Mn - City Side

Adani Airports to dominate the Airports space with 300 m + consumer base leveraging network effect and consumer mindset.



1. Source: AAI, Circle size is representative of FY20 passenger traffic

Adani Airports – Operational Framework

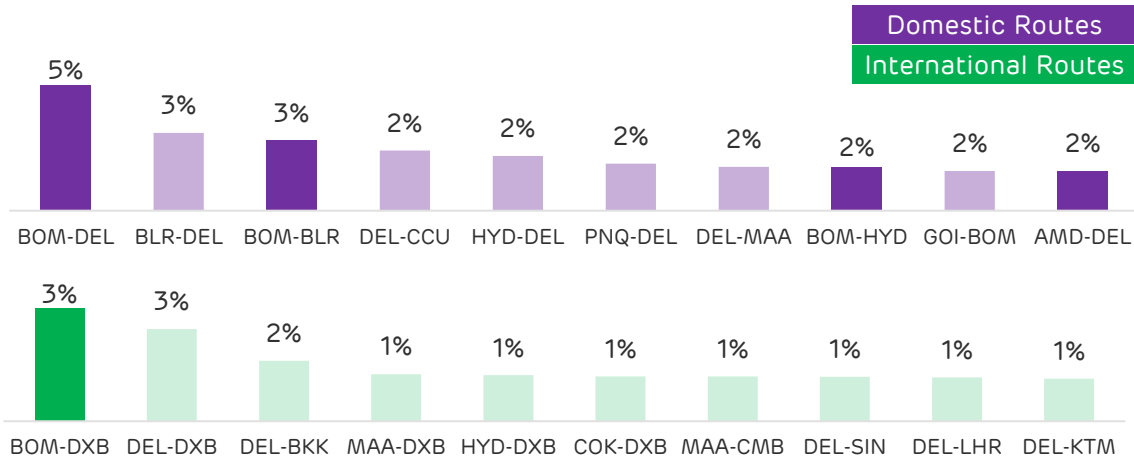
Adani Airport Digital Platform



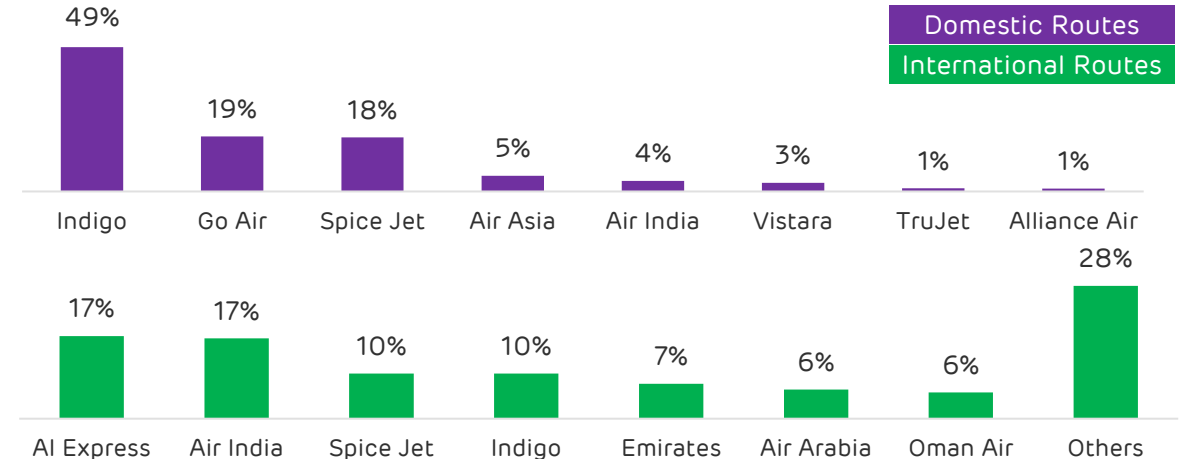
Airport Economic Precinct offers a seamless experience to consumers and passengers - unique interface with consumer segments

Adani Airports – Airside Strategy

Passenger Profile¹



Airline Profile²



Route Development

Network Strength

- Leveraging network synergies to **increase market competitiveness**
- Route development strategy to **leverage on international gateway and regional footprint**

Slot Planning

- Slot planning to work **cohesively** with route development strategy
- Optimizing slot planning to provide **efficient service to airlines**

Airside Strategy

Airline Partnerships

- Establishing **long term partnerships** with anchor airlines to enable sharing of data
- Creating a **market-pull mechanism** to feed into airport infrastructure planning

Airside Operational Efficiency

- Minimizing turn around time** for airlines
- Ensuring **highest level of safety**
- Providing full suite services to airlines

Yield Planning

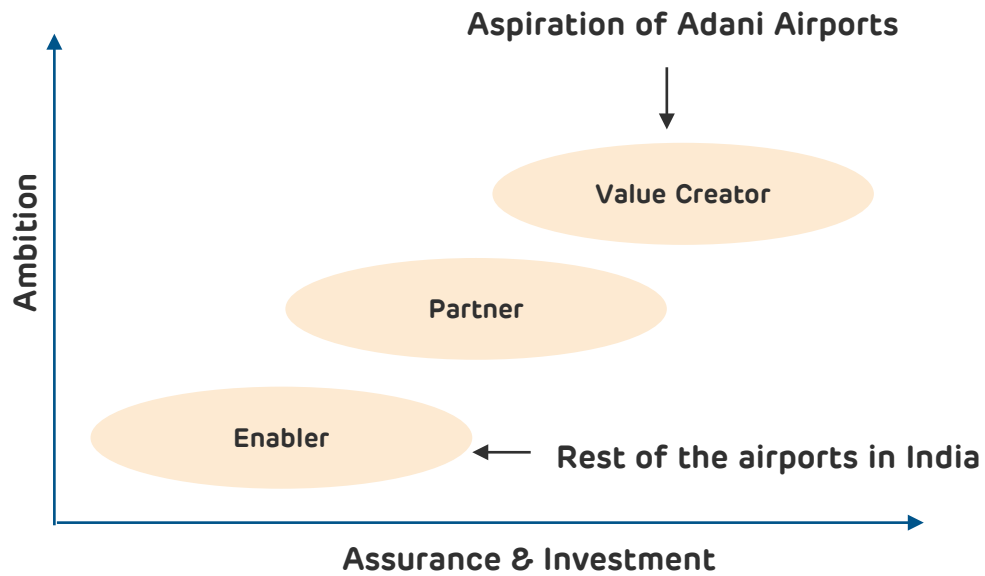
Capex planning to work cohesively with tariff rate strategy to ensure long-term tariff to increase slower than inflation

1 – Source: DGCA, Industry Research
2 – Industry Research

Airside Strategy: Cargo to use inter-group synergies

Adani Airports will orchestrate the journey from enabler to value creator...

...by adopting the differentiating strategies

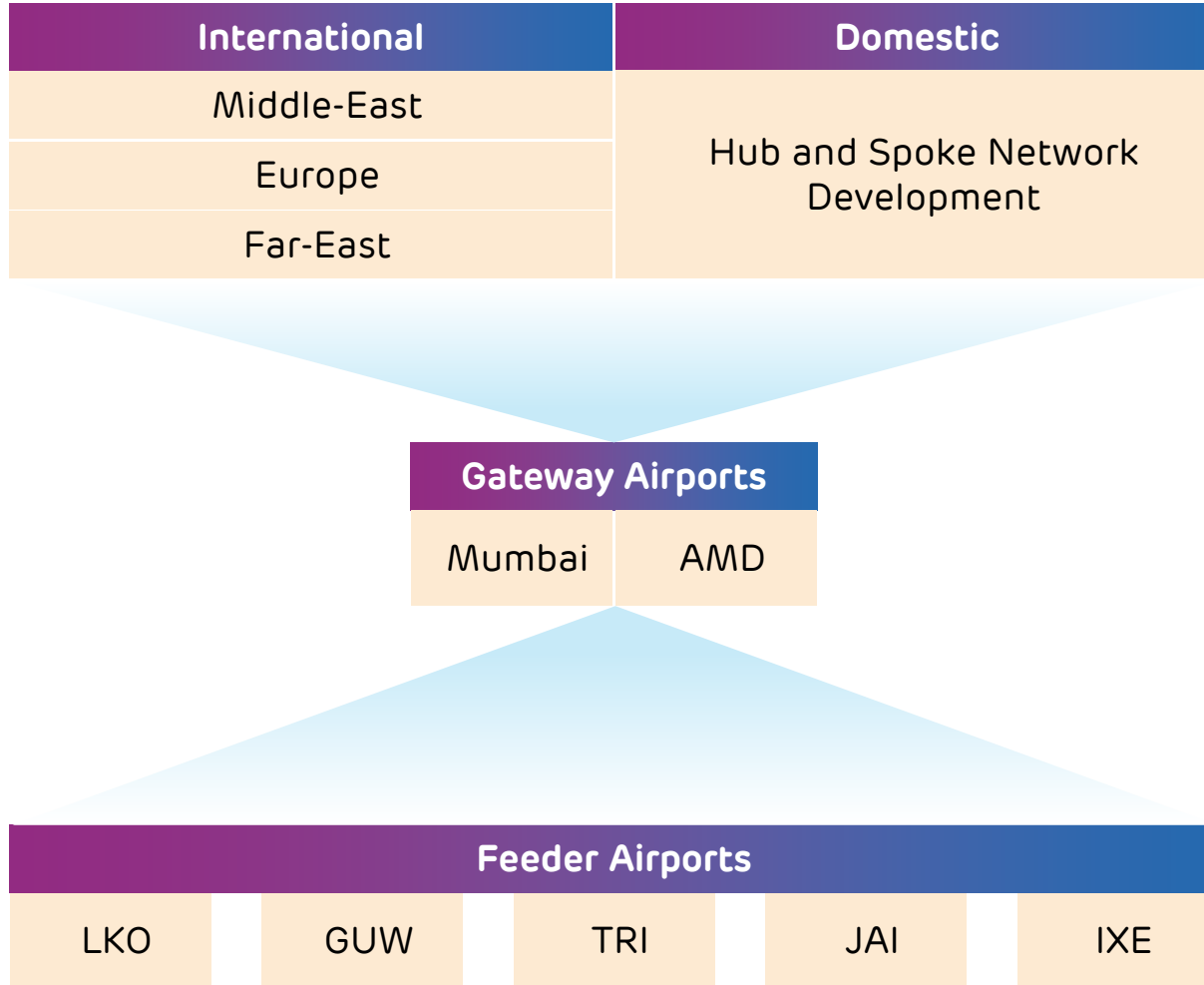


Differentiator	Strategies
Integrated network of logistics	E2E Logistics Services , along with Adani Ports and Logistics Divisions
Multimodal integration	Network of Air Freight Stations , connected with bonded Road Feeder Services (RFS)
Innovative and integrated information technology	Cargo Community System for 100% paperless and integrated system for all modes, customers and regulators

With initiatives such as multi modal logistics hub, single digital platform integrating air, sea, rail & road cargo, single window for customer etc. Adani airports will realize the true potential of air cargo at these airports

Airside Strategy: Network effect of Adani Airport Platform

Gateway-Feeder airport coupling development to create route development synergies



Gateway Development

Gateway Airports offer an opportunity to create regional accessibility

Pricing Strategies to ensure stable traffic throughout the year

Route management to increase gateway operations during off-peak times

Breaking existing monopolies and increasing consumer accessibility

Regional Footprint

Gateway Airports can serve as regional route development hubs

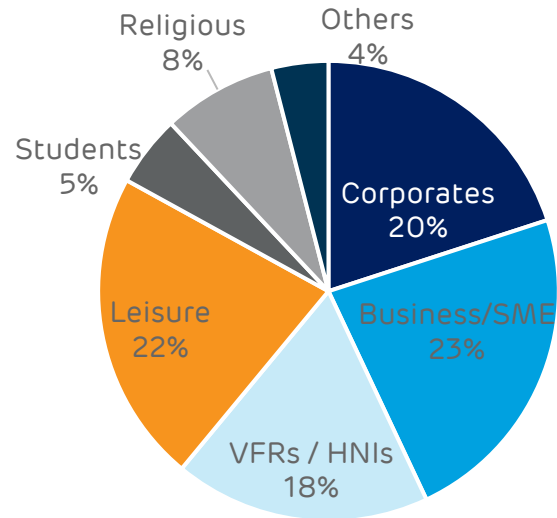
Pricing Strategies to create higher passenger flow

Enable higher extraction of revenue from transit passengers

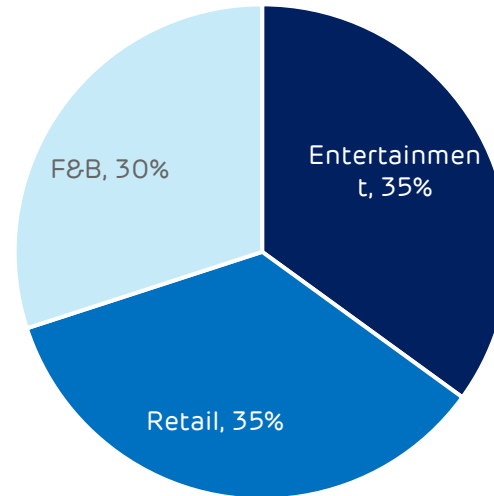


Adani Airports: Landside strategy

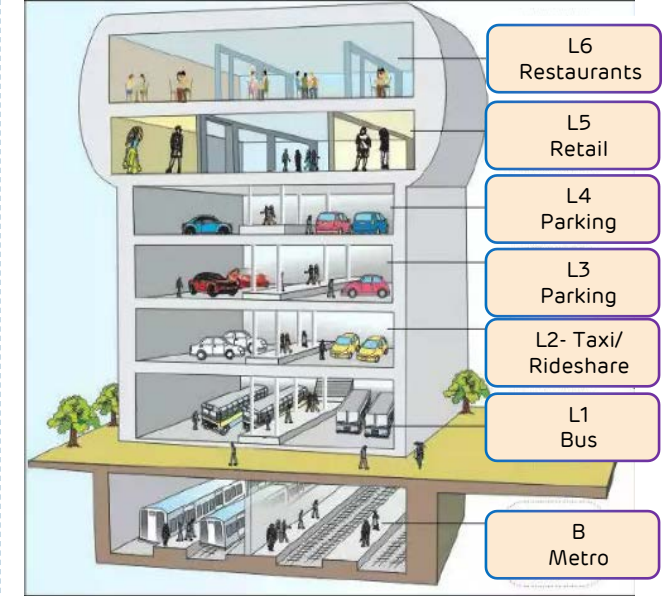
Passenger: Purpose of Visit



Optimum Commercial Mix



Integrated Terminal Plaza



Terminal Development

Passenger flow

- **Urban Turbine Design** to ensure passengers go through the plaza
- Efficient statutory processes, **maximizing time spent at commercial areas**

Terminal Plaza

- **Integration of soft services** – Self check-in kiosks, baggage drop-off
- **Commercial offering** to complement airside offerings

Retail Strategy

Optimal Rental/Retail Mix

- **Customized rental/retail mix** to maximize wallet capture at each destination
- Creative advertising solutions to compliment retail strategy

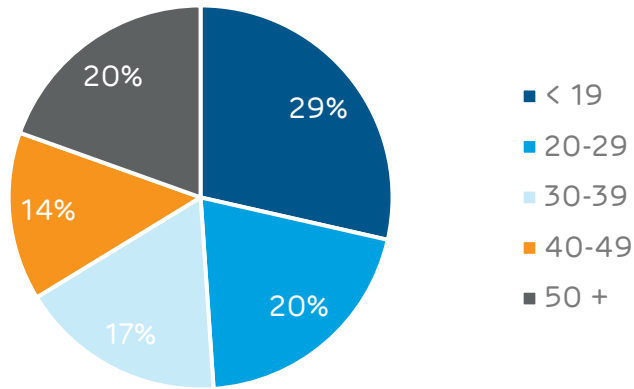
Must-visit destination

- **Iconic installation** with multi sensory experiences
- Concept stores
- Global and local cuisine
- Destination flavors and goods

Adani Airports: City side Strategy

Customer Profile

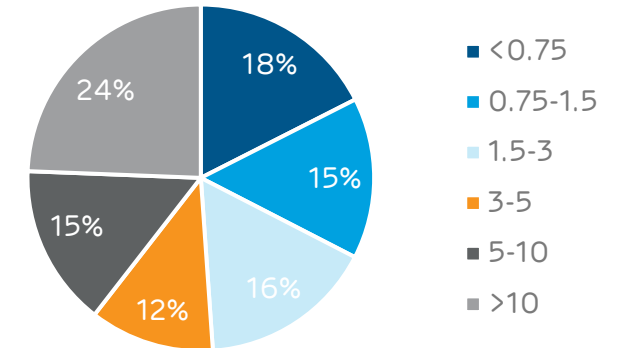
Age



Gender



Income



Real Estate Strategy

Mixed use development

Lease model with development based on detailed airport plan
Integrating various zones through a landscaped central lifestyle hub with open seating and spill out areas

Multi modal connectivity

Integrated connectivity planned with car park, bus terminal and metro station

Lifestyle Hub

Hospitality

Hotels, Restaurants, Bars
Entertainment

Healthcare

Hospitals
Spas, Gyms

Commercial RE

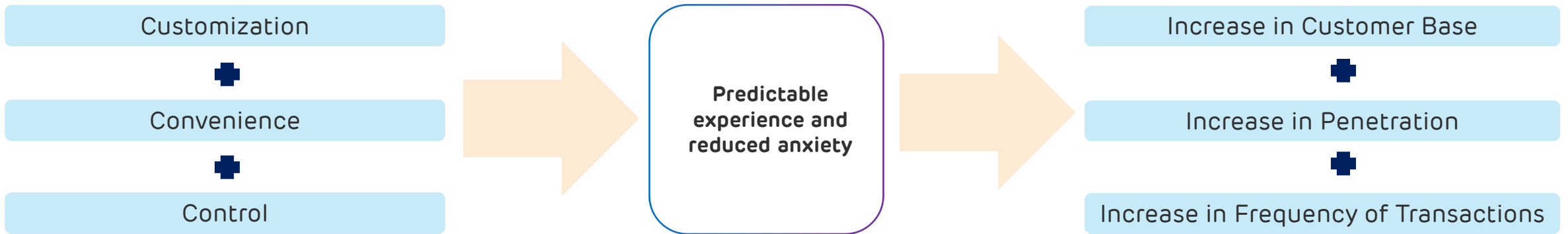
Offices, co-working spaces
Showrooms

Retail

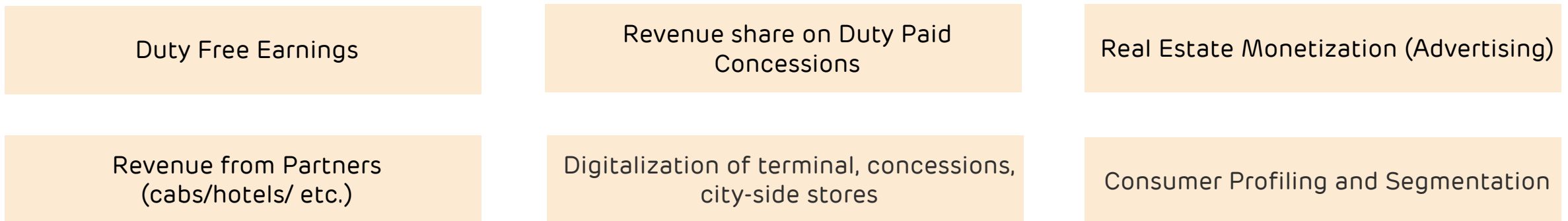
Malls
Brand showrooms

Adani Airports: Digital Platform

Cohesive Tech Platform: 3 Cs



E-Commerce and Digital Marketplace



Audience of One: Consumer and Digital Focus

Consumer and Non Passenger Focus

Non Passengers/Consumer / Passenger Profiling

Consumer Segmentation Expectations

Airline Partnership / Network Planning

Business Intelligence & Measuring Customer Demand

Provide more Customization, Convenience and Control

Digital Strategy and Technology

Digital Market Place to enhance consumer monetization

Digital Platform Connecting all stakeholders

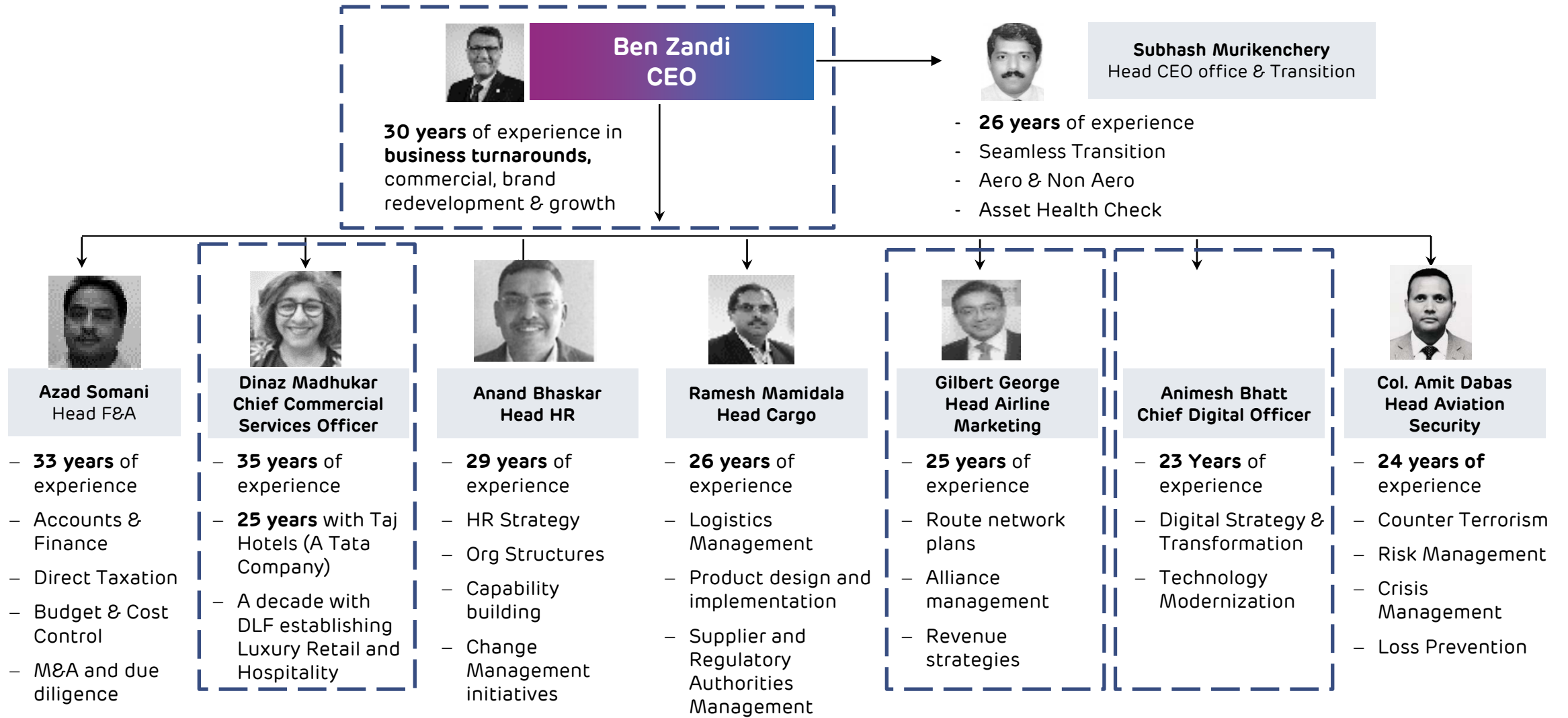
Technology engagements

Cross Sell product portfolio

Voice of the Consumer & Customizing Value

Non passengers and Digital strategy are core to the monetization of 300+ mn consumer base

Strong team in place for – value capture strategy



Management team set to deliver on – Pax & Non Pax integration supported by Digital Leadership and team



Environment based formal assurance program

- Certified environment management system ISO14001
- Carbon Neutrality (Commitment to CDP & TCFD disclosures and SBTi)
- Externally Assured Public Disclosure on auditable standards developed by GRI & SDGs
- Energy management system ISO50001

Social based formal assurance program

- Certified Safety management system - ISO45000
- Signatory and annual progress report to UNGC
- Commitment to social accountability - SA8000
- Certified Quality Management system ISO 9001

Governance

- Policy driven and top-down approach
- Code of Conduct for all areas
- Diversified Board
- Enterprise Risk Management (Basis COSO principle)

Adani Airports – Compelling Investment Opportunity

Group Strength – Delivering World Scale Platform

- **ADANI** – world class infrastructure and utility portfolio
- Repeatable, robust & proven model to deliver RoE and applied consistently across businesses

+

Indian Aviation Market – *Leverage Network Effect*

- Strong growth market, to become **3rd Largest Aviation market**¹
- GoI Initiatives – PPP Model, MRO hub and flexible use of air space
- **Matured regulatory framework** with assured returns

+

Customer Profile – *Target High Spend Consumers*

- Young population with a median age of 27 years
- Burgeoning upper middle class and high net-worth consumers
- Millennial culture having more propensity to spend

+

Customer Centric Strategy – *Audience of One*

- **Audience of One** – more convenience, more control, more customization and predictive approach - One market, One customer
- **Industry first innovation** - integrated terminal, digital market place, multimodal transport hub

↑

Infrastructure Leadership – *Long term intergenerational horizon*

- Leading **Integrated** infrastructure developer
- **Strategic team** with rich experience in infrastructure & airport domain with global alliances



adani

Natural
Resources

Mining Services Business Presentation - BofA



Contents

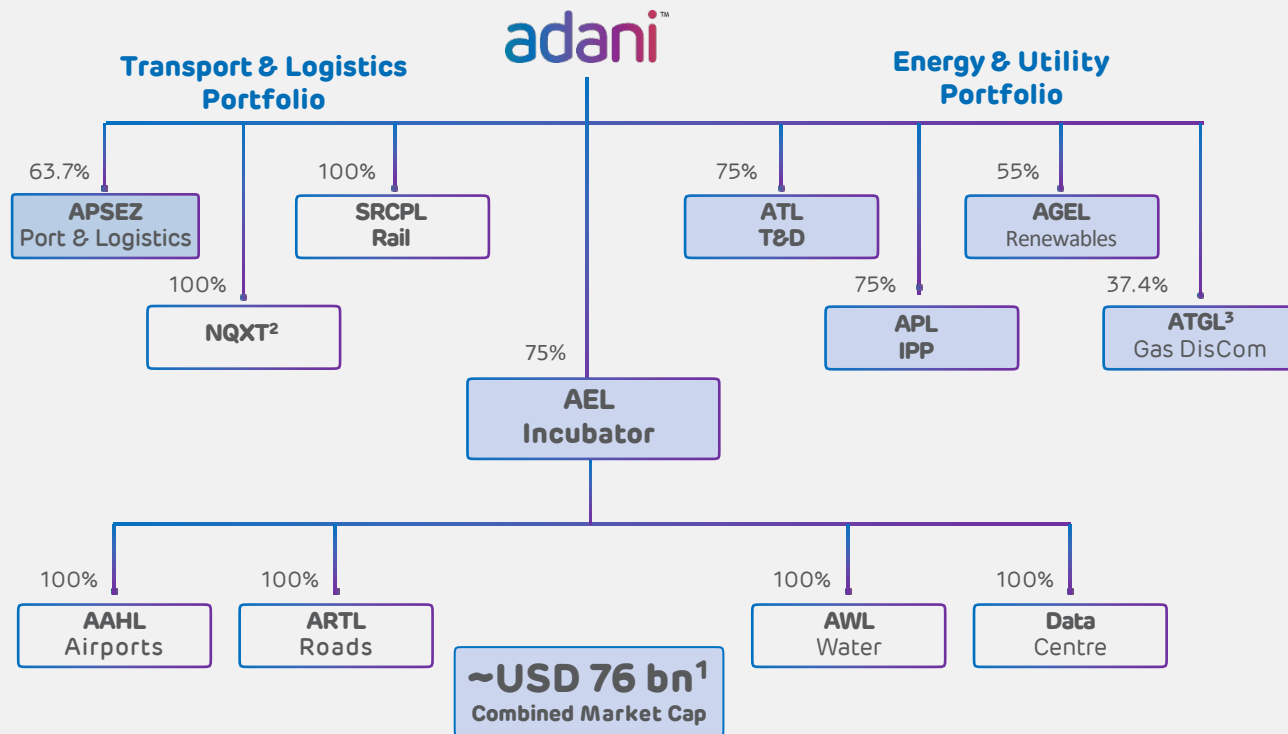
- 03-06** Group Profile
- 07-08** Mining Services Business - Overview
- 09-12** Operational & Development Philosophy
- 13-15** Mining Services – Credit Highlights
- 16-20** ESG & Sustainability Initiatives
- 21-22** Mining Services Business – Outlook



Reclaimed Mine area

Adani Group Profile

Adani Group: A world class infrastructure & utility portfolio



Adani

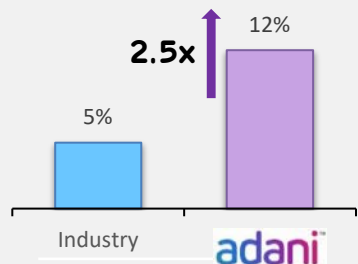
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1. As on Feb 19, 2021, USD/INR – 72.6 | Note - Percentages denote promoter holding
 2. NQXT – North Queensland Export Terminal | Light blue color represent public traded listed verticals
 3. ATGL – Adani Total Gas Ltd

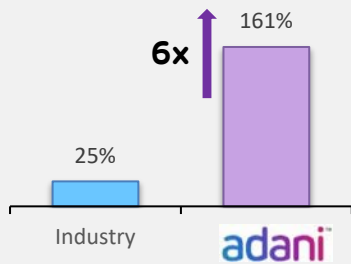
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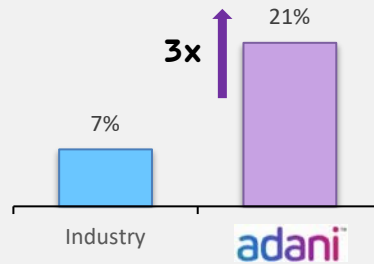
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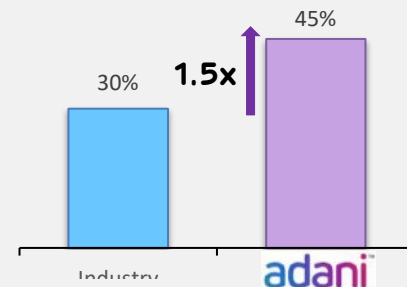
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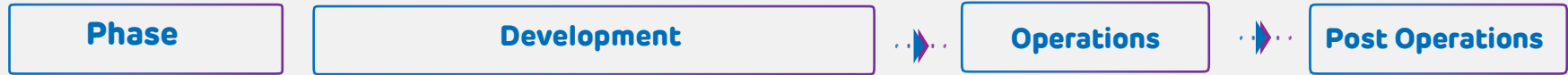
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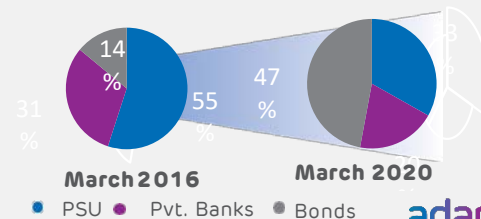
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Adani Group: Repeatable, robust & proven transformative model of investment



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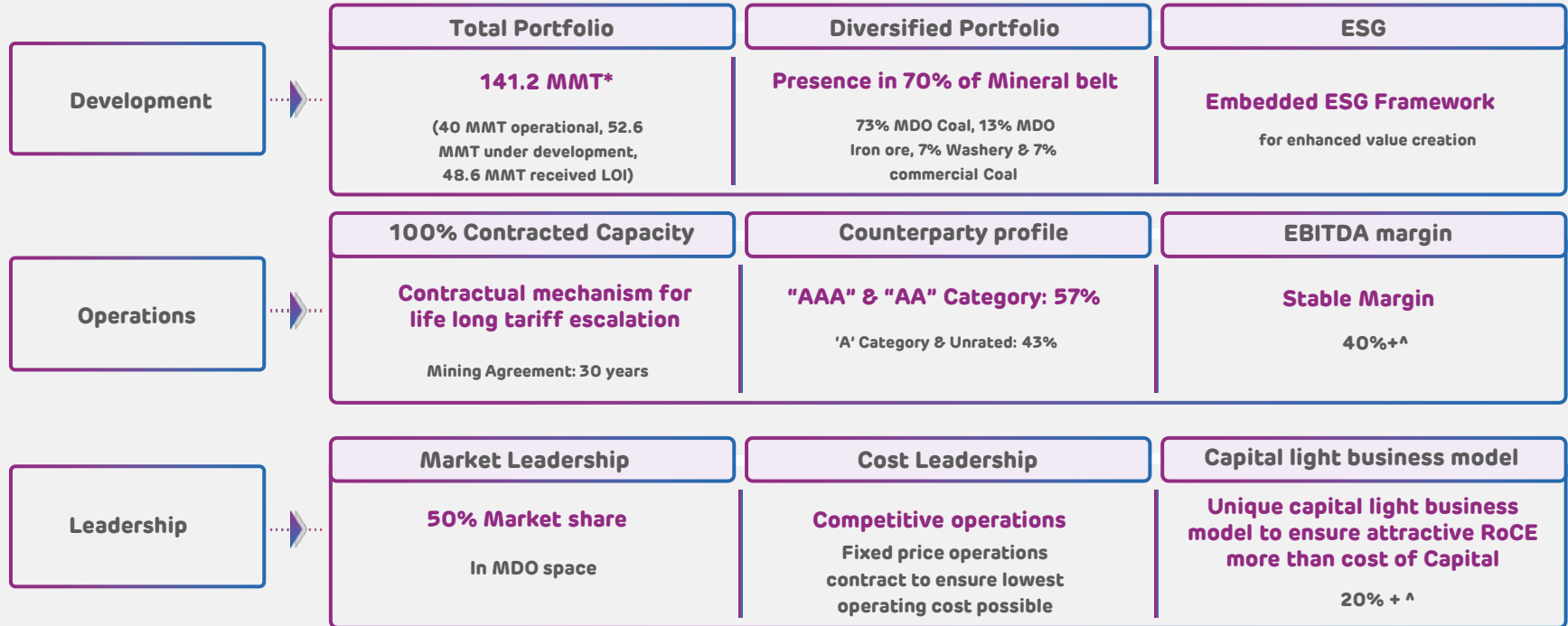
Performance	India's Largest Commercial Port (at Mundra)	Longest Private HVDC Line in Asia (Mundra - Mohindergarh)	Largest Single Location Private Thermal IPP (at Mundra)	648 MW Ultra Mega Solar Power Plant (at Kamuthi, TamilNadu)	In FY20 seven international bond issuances across the yield curve totalling ~USD4Bn
	Highest Margin among Peers	Highest line availability	High declared capacity of 89% ¹	Constructed and Commissioned in nine months	All listed entities maintain liquidity cover of 1.2x- 2x as a matter of policy.



1. FY20 data for commercial availability declared under long term power purchase agreements;

Mining Services Business - Overview

Robust Business Model with Rapid Growth & Predictable Returns

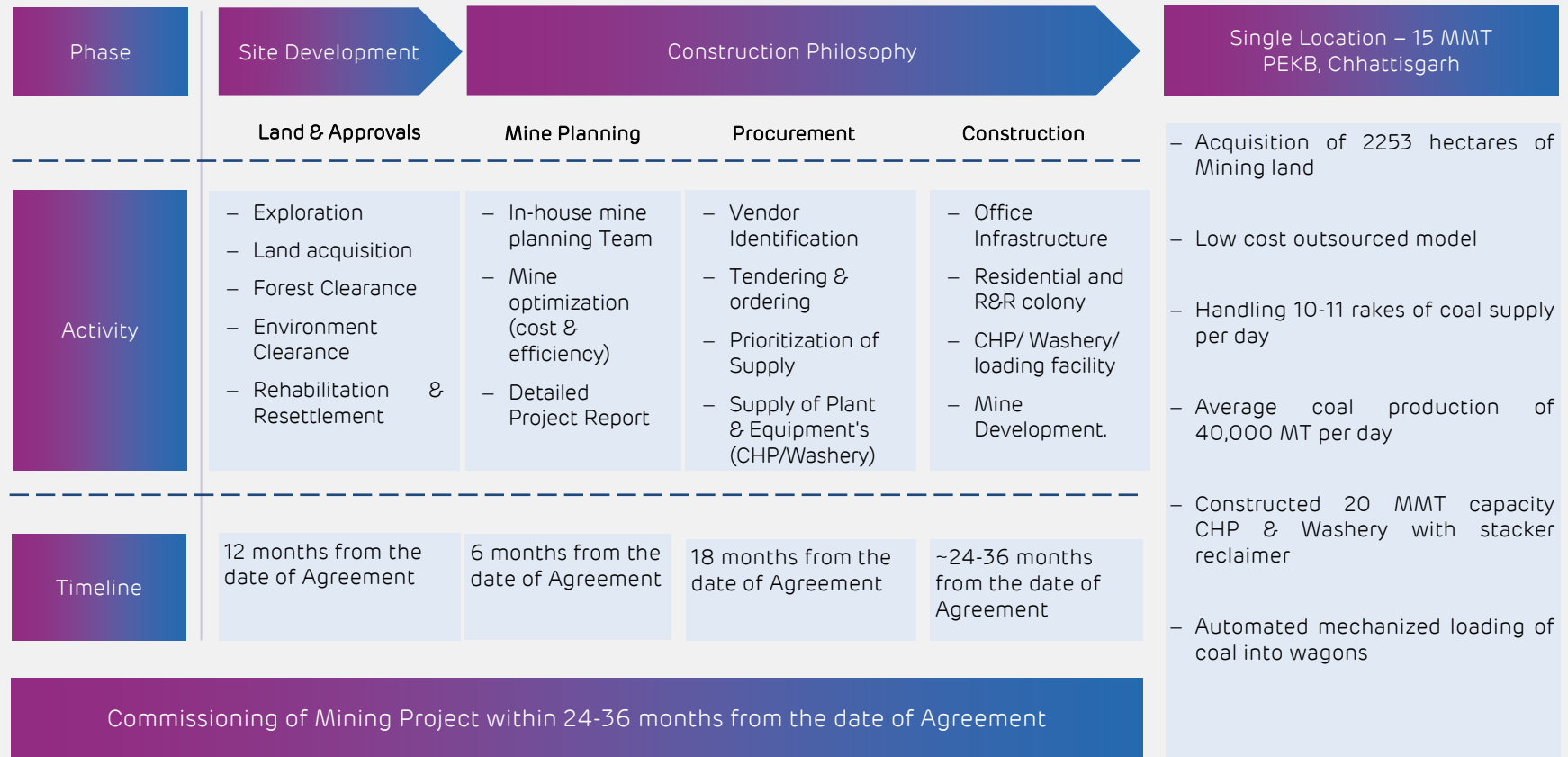


* Locked in Growth - Signed concession agreement or received LOI

^ Steady state Margin

Mining Services Business - Development & Operations Philosophy

MSB - Development & Construction Philosophy



MSB - Tech Initiatives for World Class O&M capabilities

Key O&M Focus Areas

**Productivity,
Automation,
Compliance,
Monitoring,
Optimization, Safety**



Surveillance



**Safety, Security,
Process, Optimisation**



Unique Innovation

**Operator
Independent
Truck Dispatch
System (OITDS)**

**Outbound Logistics
Monitoring**

**Security &
Surveillance
(Including Video
Analytics)**

Benefits

- Real time visibility, & Mine performance management
- Fleet productivity improvement by around 10%
- Mine Safety.
- Currently under Pilot

- Rake efficiency increased from 8.5 rakes/day in FY 19 to 10.25 rakes in FY 20.
- Reduces administrative cost and minimal theft risks.
- Real time monitoring - GPS & Geo fencing
- Automatic alerts on route deviation.
- QRT to prevent pilferages.
- Resource Optimization, ensures driver safety, movement and track overall performance.

- Reduction in security Manpower from 42 to 21 Nos.
- Potential to reduce reaction time
- Enhance security with automated system providing enhance operation
- Integrated security system for alarm and other notification trigger
- Auto logging of vehicles during entry and exit time.

MSB - Tech Initiatives for World Class O&M capabilities

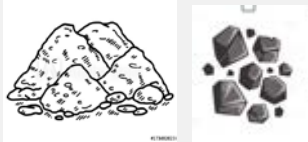
Key O&M Focus Areas

**AI & Analytics,
Efficiency
Improvement**



1st Time
in Mining

**Database
Management,
Analytics,
Monitoring,
Planning**



**Project
Management,
Planning**



Unique Innovation

**Asset performance
management CHPP**

**Monitoring
Operational
Coal/Mineral, Waste
Removal Plan and
OB Management**

**Infrastructure
Planning & Project
Management**

Benefits

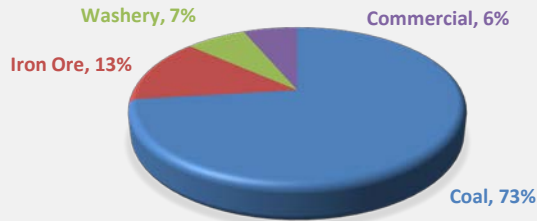
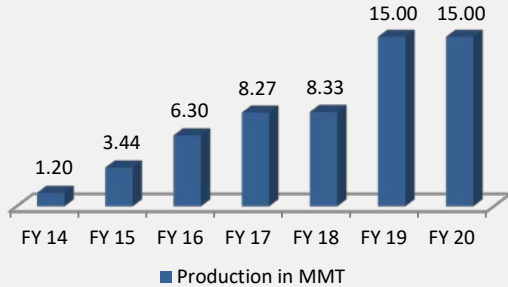
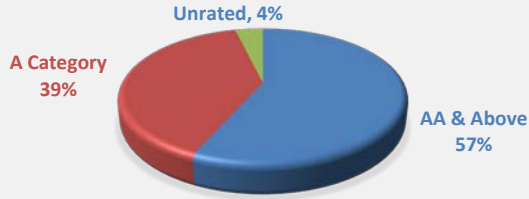
- Systematic on-line data collection - CHPP and Big Data performance analysis
- Criticality Alerts for equipment health
- Opportunity to improve efficiency
- JIT Inventory based on Predictive Maintenance

- Minimum deviation from our Monthly Operational Plan
- Eliminating excess payments
- Ensure Mines Safety as per DGMS Dashboard of Contractor performance
- Reclamation submission details to MoC and MoEF

- **GP III and Talabira projects got operational in 2 years time.**
- Optimum utilization of mining area
- Project execution and performance as per priority
- Life Cycle Project Cost Control.

Mining Services Business – Credit highlights

MSB – Key Strengths



Strong Counter party

- Long term (30 Yr) contract with sovereign / sub-sovereign entities
- State and Central Government backed counter-parties
- Utilities and "Essential Services" ensures must run status
- Predominantly "AA" & above rated counter-parties

Assured Volume

- No volume risk due to confirmed Annual offtake of the entire Contacted Qty.

Stable Revenue

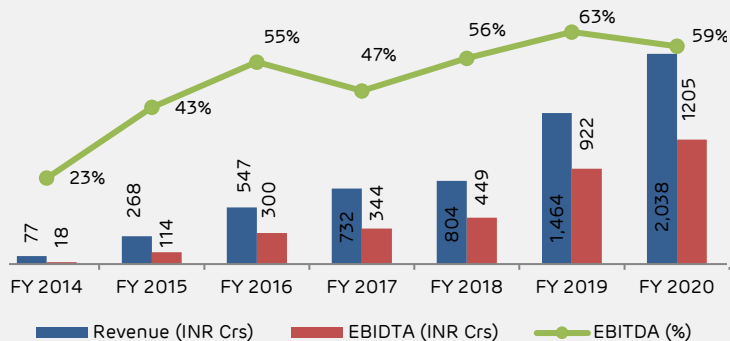
- Stable, predictable cash flow generation by long-term, fixed & cost pass-through agreements with sovereign/ sub sovereign off-takers
- Payment security mechanism & Carrying cost to ensure timely payments considering adverse economic implications

Diversification

- Geographical Diversification across states.
- Product Diversification in terms of Coal, Commercial, Iron ore, Washery, other Minerals and Transportation services

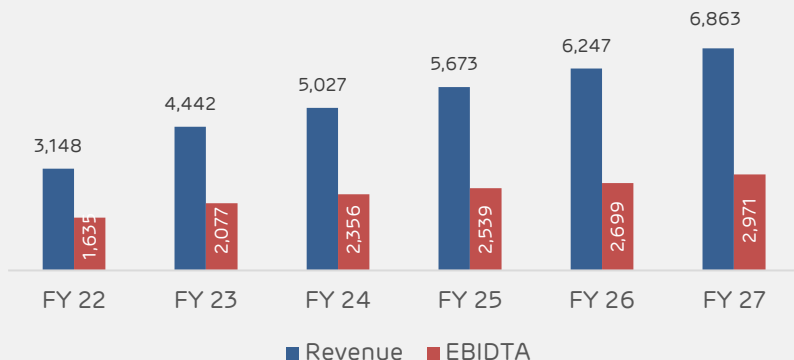
MSB – Financial Outlook (Existing & Forecast)

Revenue & EBIDTA (INR Crs)

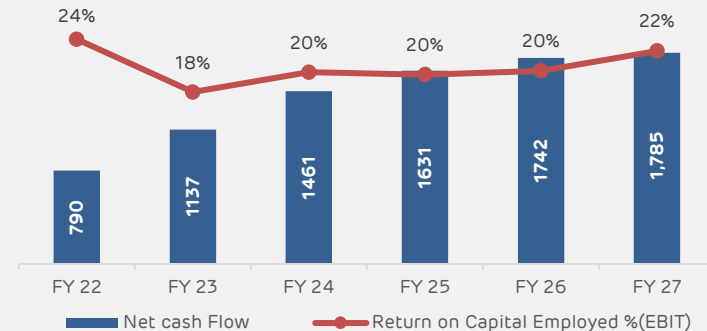


- ✓ EBIDTA margin of > 40% for entire life cycle.
- ✓ ROCE of > 20% on a sustainable basis.
- ✓ No product risk and price risk.
- ✓ Unique Fixed Operating Cost model for First Quartile Cost curve.

Projected Revenue & EBIDTA (INR Crs)



Projected Cash Flow* & ROCE (INR Crs)



Mining Services Business - ESG & Sustainability initiatives

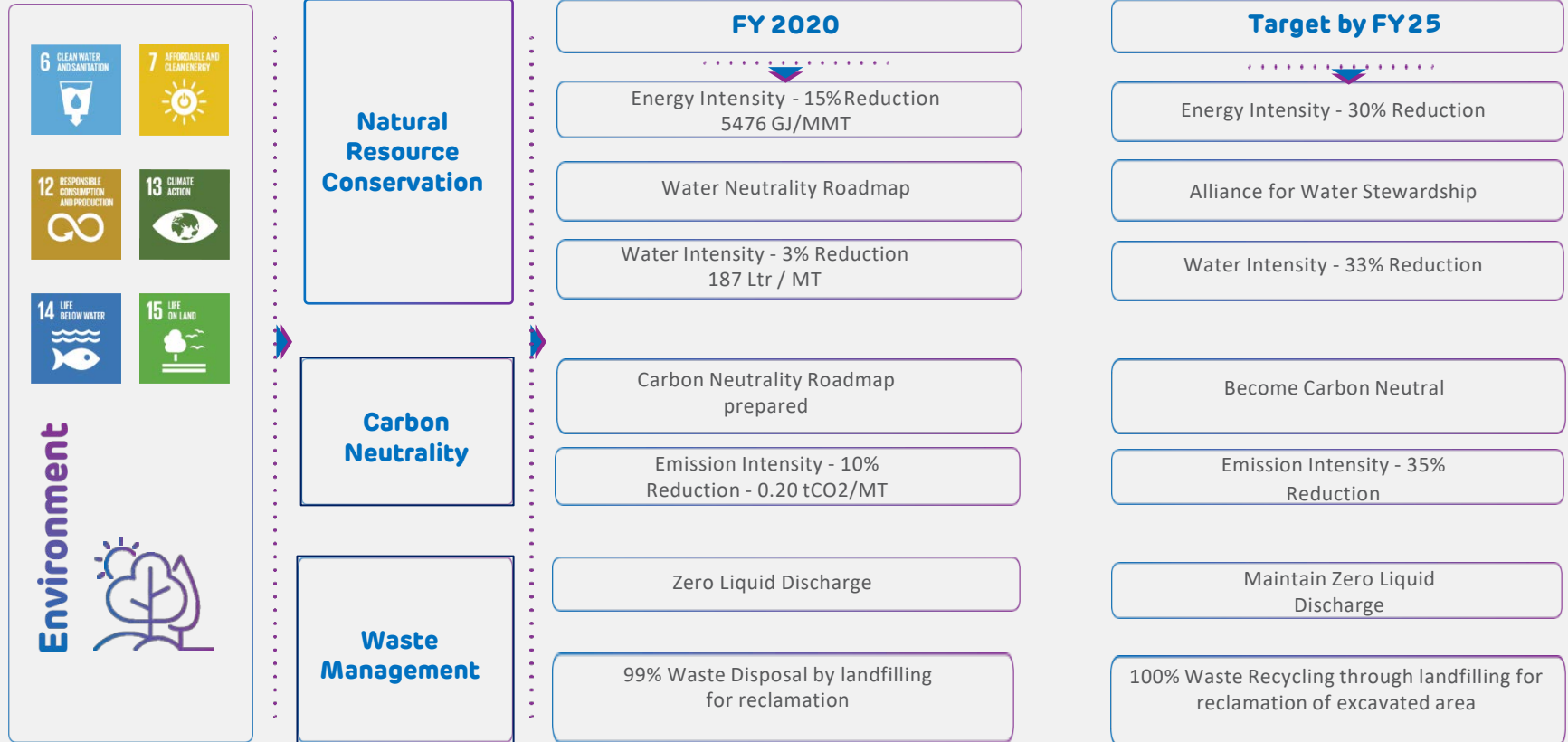
Certification

ISO 2600:2010, ISO 31000: 2009,
ISO 9001:2015, ISO 14001:2015,
OHSAS-18001:2007

Focus Areas

- Efficient use of water and energy
- Reduction of emission levels
- Zero tolerance for fatalities at mine sites
- Biodiversity Conservation

MSB ESG: Sustainability Roadmap



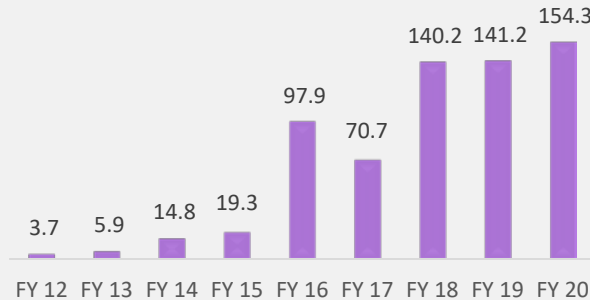
Compared to Base year FY 18



Recreating Environment

- Innovative Reforestation technology of Tree Transplantation.
- Transplanting native tree species to an alternative site
- Conserving the local ecology through Tree Plantation.

Tree Plantation (,000)



8376
Trees
Transplanted



6.48 Lakh
Trees Planted
Terrestrial
Plantation



**CA Land &
Excavation
Area**

3797 Ha - C Afforestation
261 Ha - Reclamation

MSB Sustainability – Social Footprint

Our CSR Philosophy



As a Group, social upliftment is key to our approach

Healthcare

- Free medical assistance and healthcare available at the doorstep of villagers

Education

- 10+2 CBSE school set up to impart quality education to tribal children

Employment

- More than 400 tribal people employed at the PEKB mines

Sports

- Adani Surguja Football Academy at Ambikapur to nurture aspirations of tribal youth

Flagship Initiatives Undertaken at project site



Kaushal Vikas Kendra
Empowering the youth to be financially independent and self-sufficient



Adani Vidya Mandir
Cost-free quality education to children of project affected village families



Rural Infrastructure Development
Solar power as an alternative of conventional energy to villagers



Skill Development and Entrepreneurship
State of the Art Vocational Training Centre for local villagers

MSB Sustainability - Community Development



Education

Adani Vidya Mandir- Free Educational support to students from LKG to Class IX.

672 students

Project Sankalp- Special Coaching Classes for students of Class X and XII appearing for Board Exams.

78 students



Sustainable Livelihood

Economic Engagement of women through formation of Women Cooperative MUBSS (Project Unnayan).

90 Women Directly Engaged and 210 Women Indirectly Engaged

Sustainable source of income for the farmers through the use of modern agriculture agricultural practices (Project Annapurna and Project Vasundhara)

600 Beneficiaries



Community Health

General Mega Health Checkup Camps -

3 Camps, Total-1200 patients

Project Jeevan Amrit- Distribution of drinking water to households of mine peripheral villages

300 Households

Village Pad Banks to promote good menstrual hygiene practices

42 Pad Banks



Community Infrastructure

Repairing and Maintenance of Hand Pumps in 14 mine peripheral villages

254 hand pumps

Pond Deepening to help farmers meet their irrigation needs

100 Beneficiaries

Mining Services Business – Outlook

Mining Services Business – Outlook

Group Strength

- **ADANI** – world class infrastructure and utility portfolio.
- AEL sponsorship providing **long term stable cashflow & enhanced RoE**.
- **Repeatable, robust & proven model** to deliver RoE and applied consistently across businesses.

Business Outlook

- **Current order book of 141.2 million ton** under operation/development.
- **Mining Service Tenders of approx. 100-125 million ton** are expected in next 2-3 years.
- **Contractual Business** supported by Long term fixed contracts[^]

Asset profile

- **Proven business model** with efficient capital investment requirement leading to high EBIDTA margins of more than 40% and ROCE of more than 20%.
- **Unique operating model** with stable and assured offtake and revenue with Inflation linked service fee ensures annuity cash-flow stream.

Customer Profile

- **Predominantly "AA" & above** rated counter-parties.
- **State and Central Government** backed PSU's counter-parties.
- **Utilities and "Essential Services"** ensures must run status even in COVID 19 Pandemic period.

Credit Rating

- Initial Credit Rating of **BBB in 2012**.
- **Upgraded to A in 2015 and rated A+ (SO) in 2016** i.e. one notch higher than AEL under ring fenced structure.

Infrastructure Leadership

- **Largest pure play** Mining Services player in India.
- **Strategic team with rich experience** and focus on World-class technology, Sustainability, Environment & Community development.

[^] 30 Years concession period

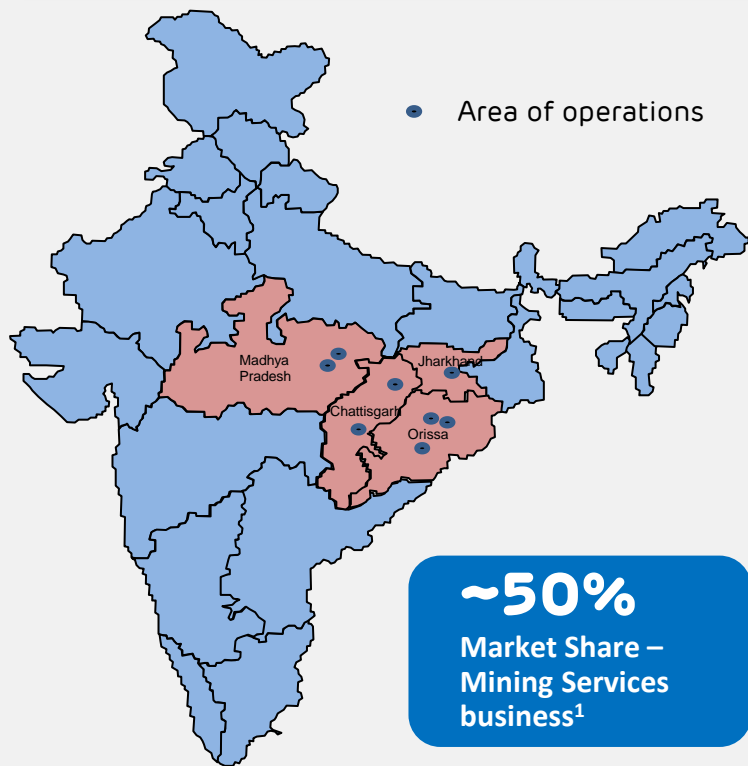
Thank You



Backup – Annexures

Largest Mining Services Business player in India

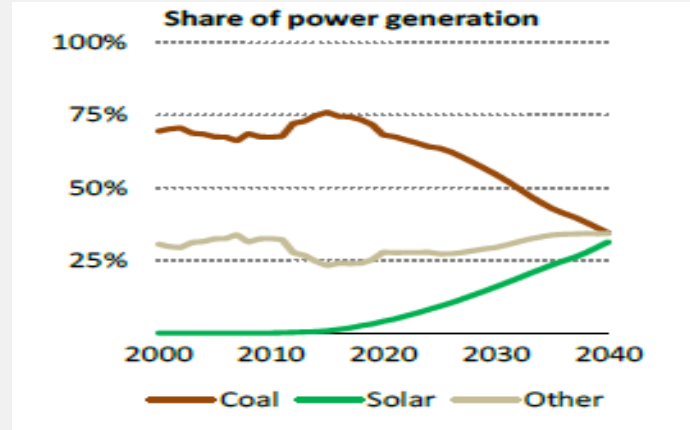
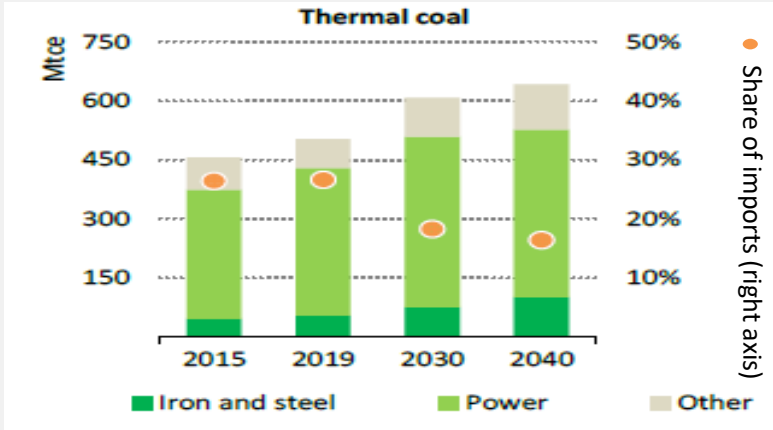
Point of Presence covers 70% of mineral belt



Status	Block Name	Capacity (MMTPA)	Project Type
Operational Mines (40 MMTPA)	Parsa (E) Kanta Basen	15.0	Mining Services
	Talabira II & III	20.0	Mining Services
	Gare Palma - III	5.0	Mining Services
Under Development (52.60 MMTPA)	Parsa Basen	5.0	Mining Services
	Kente Extension	9.0	Mining Services
	Gidhmuri Paturia	5.6	Mining Services
	Suliyari Coal Block	5.0	Mining Services
	Bailadila Iron Ore	10.0	Mining Services
	Kumitar Iron Ore	9.0	Mining Services
	Gondulpara	4.0	Commercial
	Dhirauli	5.0	Commercial
LOI Received (48.60 MMTPA)	Gare Palma Sector - I	15.0	Mining Services
	Gare Palma Sector - II	23.6	Mining Services
	Hingula Washery	10.0	Washery Services
Grand Total		141.2	

1. Based on Mining Services contracts awarded till date
2. Based on Peak capacity contracted

Coal Demand & share in Power generation in India



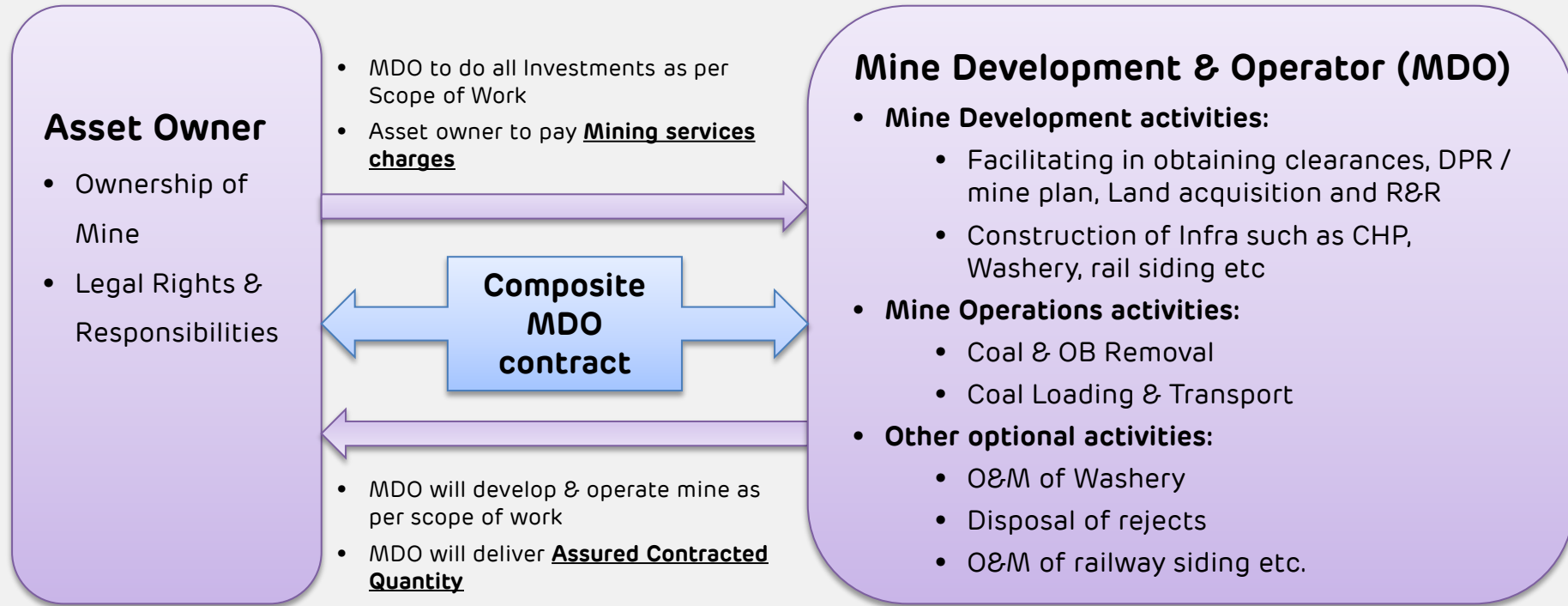
India is the world's third-largest energy consuming country, thanks to rising incomes and improving standards of living.

Energy use has doubled since 2000, with 80% of demand still being met by coal, oil and solid biomass. India's electricity demand is still projected to grow by almost 5% per year to 2040.

An expanding economy, population, urbanisation and industrialisation mean that India sees the largest increase in energy demand of any country to 2040.

- India's ambitions to reduce import coal dependence is key to its 1334 Twh (2019 - 1135Twh) coal-based electricity by 2040.
- Coal based generation will continue to have major share in overall power generation till 2040

Mine Development & Operations Business Model - Overview



Major activities are transferred to one contractor - Ease in Contract Management