

**इंजीनियर्स
इंडिया लिमिटेड**
(भारत सरकार का उपक्रम)
एक नवरात्र कम्पनी

**ENGINEERS
INDIA LIMITED**
(A Govt. of India Undertaking)
A Navratna Company

पंजीकृत कार्यालय : इंजीनियर्स इंडिया भवन, 1, भीकाएजी कामा प्लेस, नई दिल्ली-110 066 भारत
Regd. Office : Engineers India Bhawan, 1, Bhikaiji Cama Place, New Delhi-110 066 INDIA
ईमेल/e-mail: company.secretary@eil.co.in, दूरभाष /Phone: 011-26762855/2580

कंपनी सचिवालय/ COMPANY SECRETARIAT

सं.सचिव/No. Secy/906/9/10

09.06.2021

The BSE Limited Phiroze Jeejeebhoy Towers Dalal Street, Fort Mumbai – 400 023 Scrip Code-532178	The National Stock Exchange of India Limited Exchange Plaza, 5th Floor Bandra Kurla Complex Bandra (East), Mumbai-400051 Symbol-ENGINEERSIN
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विषय: निवेशक प्रस्तुति: वार्षिक वित्तीय परिणाम FY 2020-21 पर हाइलाइट्स

Sub: Investor Presentation: Highlights on Annual Financial Results FY 2020-21

प्रिय महोदय/महोदया,
Dear Sir/Madam,

Pursuant to the provisions of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, the Investor Presentation on highlights of the Annual Financial Results for the FY 2020-21 is enclosed herewith for the purpose of dissemination of information widely to the members.

धन्यवाद/Thanking you,

भवदीय/Very truly yours,



नरेंद्र कुमार/Narendra Kumar

अनुपालन अधिकारी/Compliance officer

संलग्नक: यथोक्त/Encl: As above



इंजीनियर्स
इंडिया लिमिटेड (भारत सरकार का उपक्रम)

 ENGINEERS
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Investor Presentation

Annual Results : FY 20-21

8th Jun 2021

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1

Overview of Engineers India Limited (“EIL”)

Company Background



- India's leading engineering consultancy & EPC company
- Over 7000 assignments executed for projects worth over USD 200 Bn
- More than Five decades of experience on landmark projects
- Significant track record across entire oil & gas value chain
- In-house and collaborative R&D (36 live patents)
- **International presence** : *Middle East, Africa, South Asia & Central Asia*
- Around 2,800 employees
- Zero debt company
- **Focused diversification:** *Infrastructure, Strategic crude oil storage, Water & Waste Water Management, Fertilizer, Non-ferrous Metallurgy, Ports and LNG*

Marquee Projects



*BPCL Refinery,
Kochi*



Bina Refinery



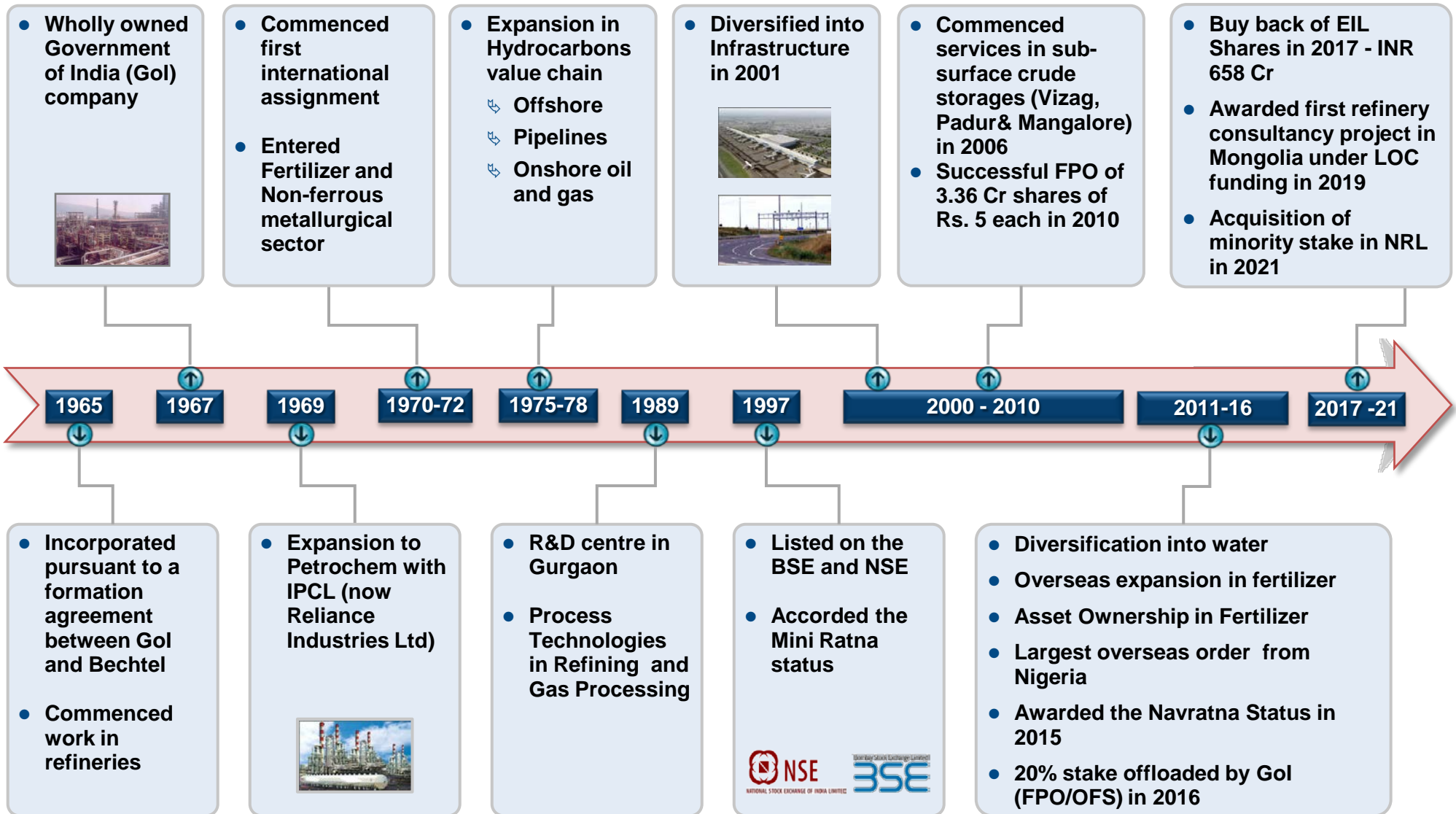
*Panipat Naphtha
Cracker Unit*

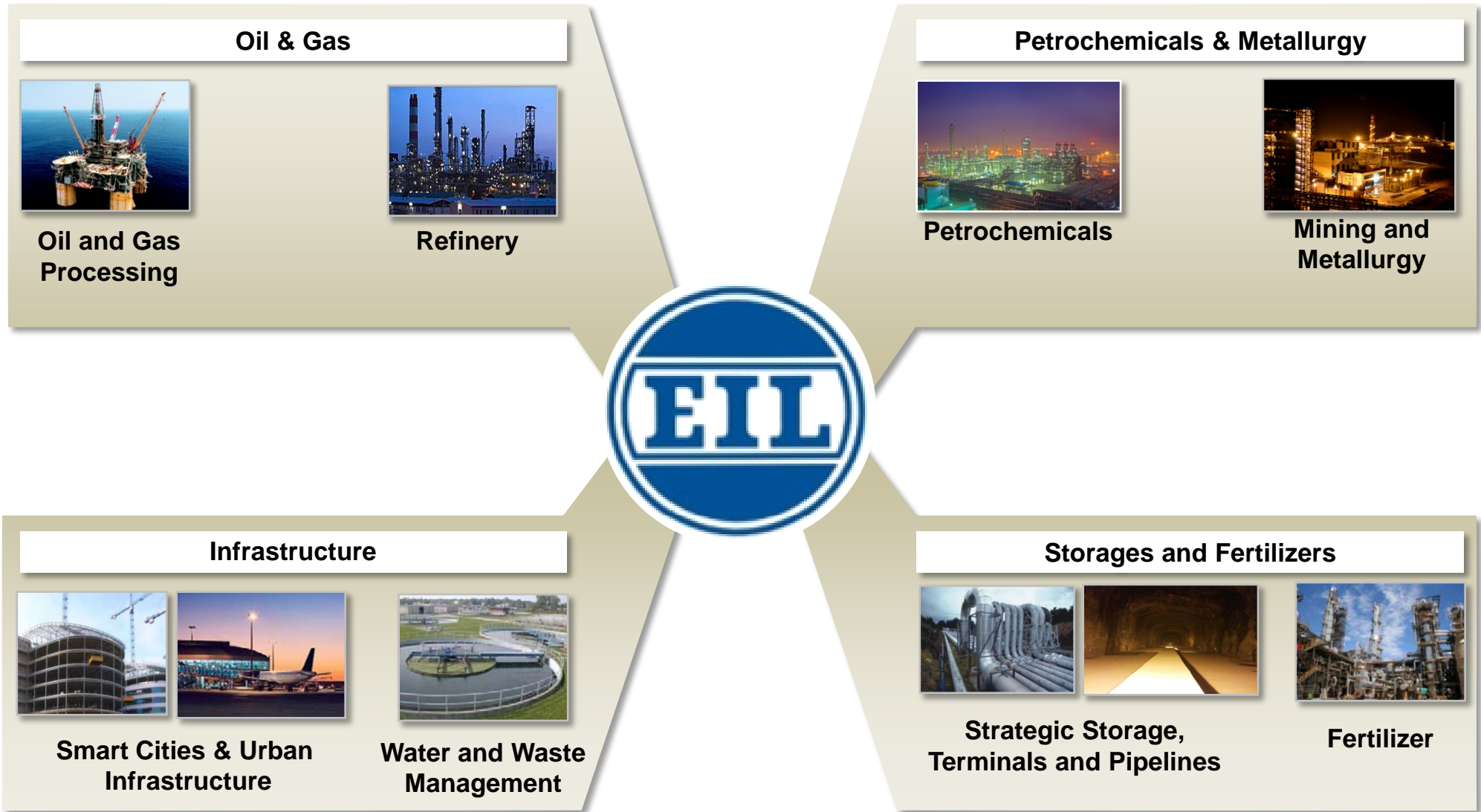


*Guru Gobind Singh
Refinery, Bathinda*

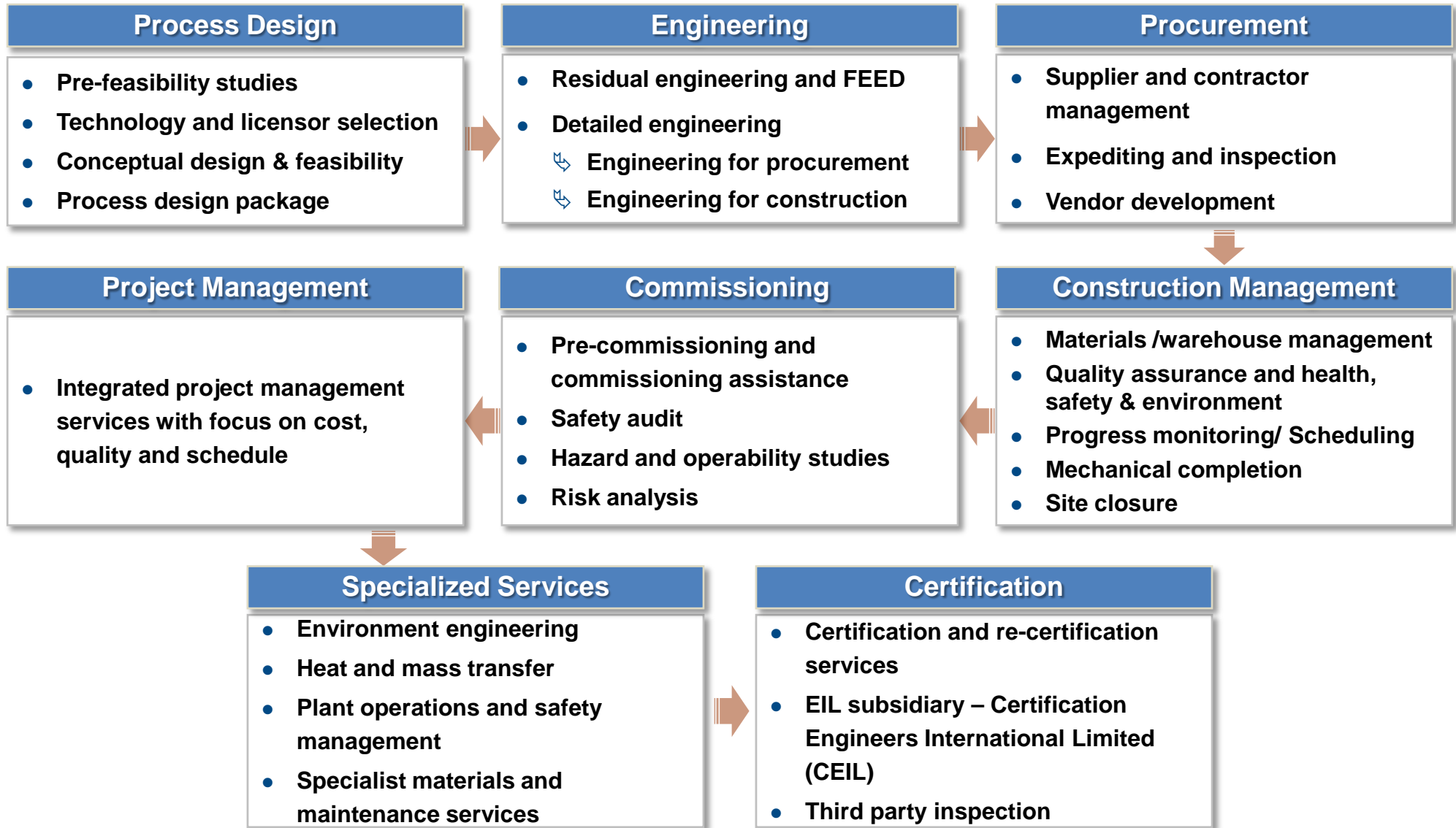


Evolution & Key Milestones – Over 5 decades





Service Offering - From Concept to Commissioning



Consultancy Contracts

<p>1 EPCM</p>	<ul style="list-style-type: none">• Engineering, Procurement and Construction Management Services	<p>2 FEED</p>	<ul style="list-style-type: none">• Front-end Engineering & Design for complete definition of scope for selection of EPC contractor
		<p>3 PMC</p>	<ul style="list-style-type: none">• Project Management Consultancy Services for managing EPC contractors

Turnkey Contracts

<p>1 LSTK</p>	<ul style="list-style-type: none">• Fixed price Lump Sum Turnkey Contracts also referred to as EPC contracts
<p>2 OBE</p>	<ul style="list-style-type: none">• Open book estimate - Also known as Cost plus contracts

Asset Ownership

<p>1 JVC</p>	<ul style="list-style-type: none">• Acquisition of Assets through Equity Participation.
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- R&D Center with multiple pilot and demo facilities at **Gurugram**
- Developed more than 35 Process Technologies
- **36 live Patents, 31 patent applications filed**
- Technology collaboration with Research Organizations of IOCL, BPCL, HPCL, GAIL and Research Institutes like CISR-IIP, CSIR-NCL, ICT, IITs
- **>60% of process technologies in refineries already indigenized**
- Tremendous technology absorption capacity has been successfully demonstrated
- **100% Engineering indigenization in high tech domain of oil & gas achieved**
- Facilitating further development of indigenous capabilities through **Start-up India (EngSUI)TM**



Capital Investments – as on Q4 FY 20-21



Description	Investment 1	Investment 2		Investment 3
Name	Ramagundam Fertilizer Project	NELP IX : Two Upstream Assets		Minority stake in Numaligarh Refinery Ltd.
		(CB-ONN-2010 / 8)	CB-ONN-2010 / 11	
Implementing agency	M/s Ramagundam Fertiliser & Chemical Ltd.	M/s Bharat Petro Resources Ltd. (BPRL)	M/s GAIL India Ltd.	-
JV Partners / Shareholding	NFL - 26%; EIL - 26%; FCIL - 11%; GAIL- 14.3%; Telangana Govt - 11%; HTAS Consortium- 11.7%	BPRL – 25%, GAIL – 25%, EIL – 20%, BFIL – 20%, MIEL – 10%	BPRL – 25%, GAIL – 25%, EIL – 20%, BFIL – 15%, MIEL – 15%	EIL stake 4.37%
State	Telangana	Gujarat	Gujarat	Assam
Size / Capacity / Area	<u>Urea:</u> 3850 MTPD <u>Ammonia:</u> 2200 MTPD	Exploration Acreage 42 Sq. Km.	Exploration Acreage 131 Sq. Km.	3 MMTPA Refinery (Currently undergoing expansion to 9 MMTPA)
Approximate project cost/ investment at start	Rs. 6120 Crores	Rs. 300 Crores / USD 50 Million (During Bidding Stage)		-
Total Equity Investment Committed by EIL	Rs. 448 Crores	Rs. 100 Crores		Rs 700 crores (approx)



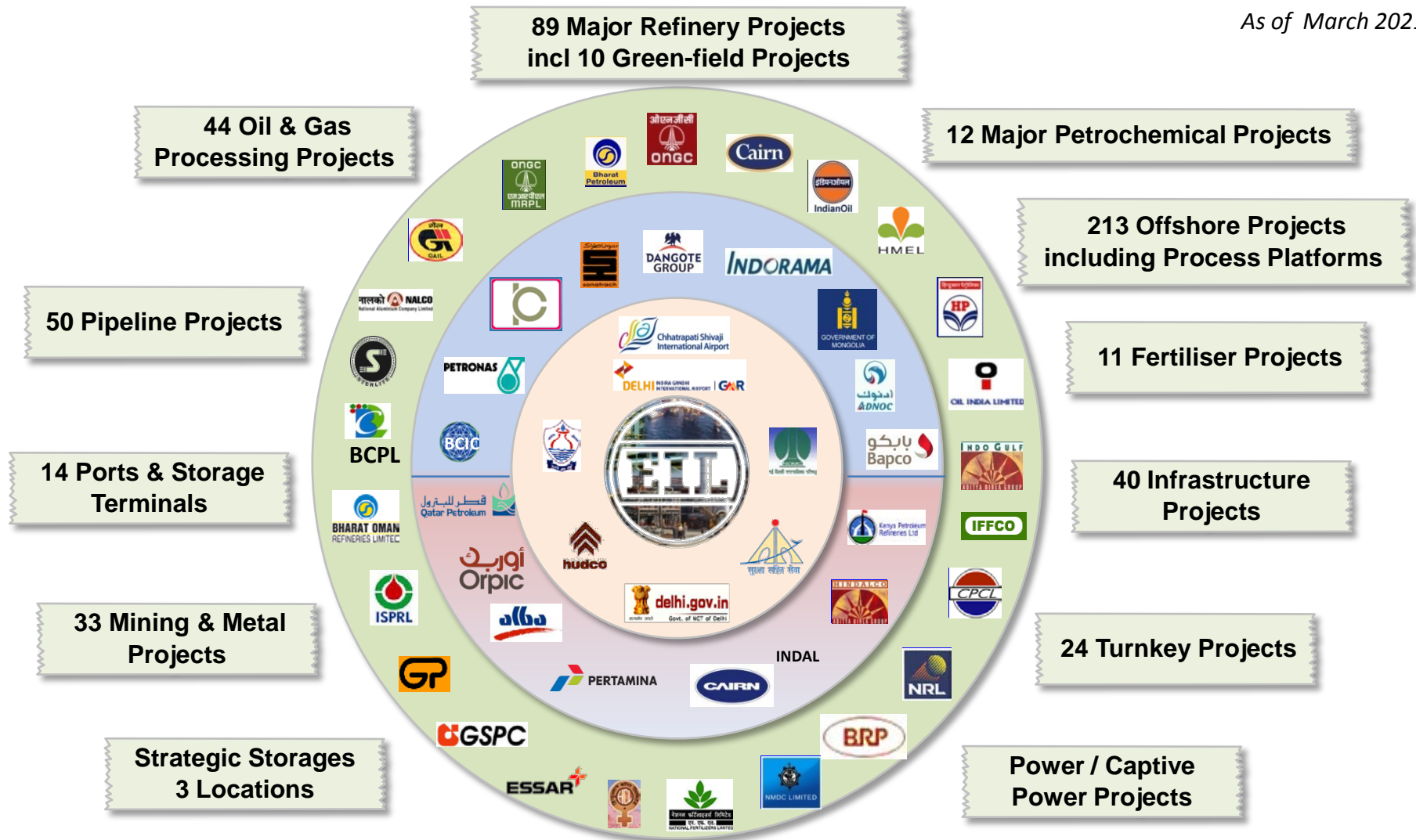
2

Track record and Credentials

Strong Track Record with diverse client base



As of March 2021



Leadership Position in Refineries & Petrochemicals in India

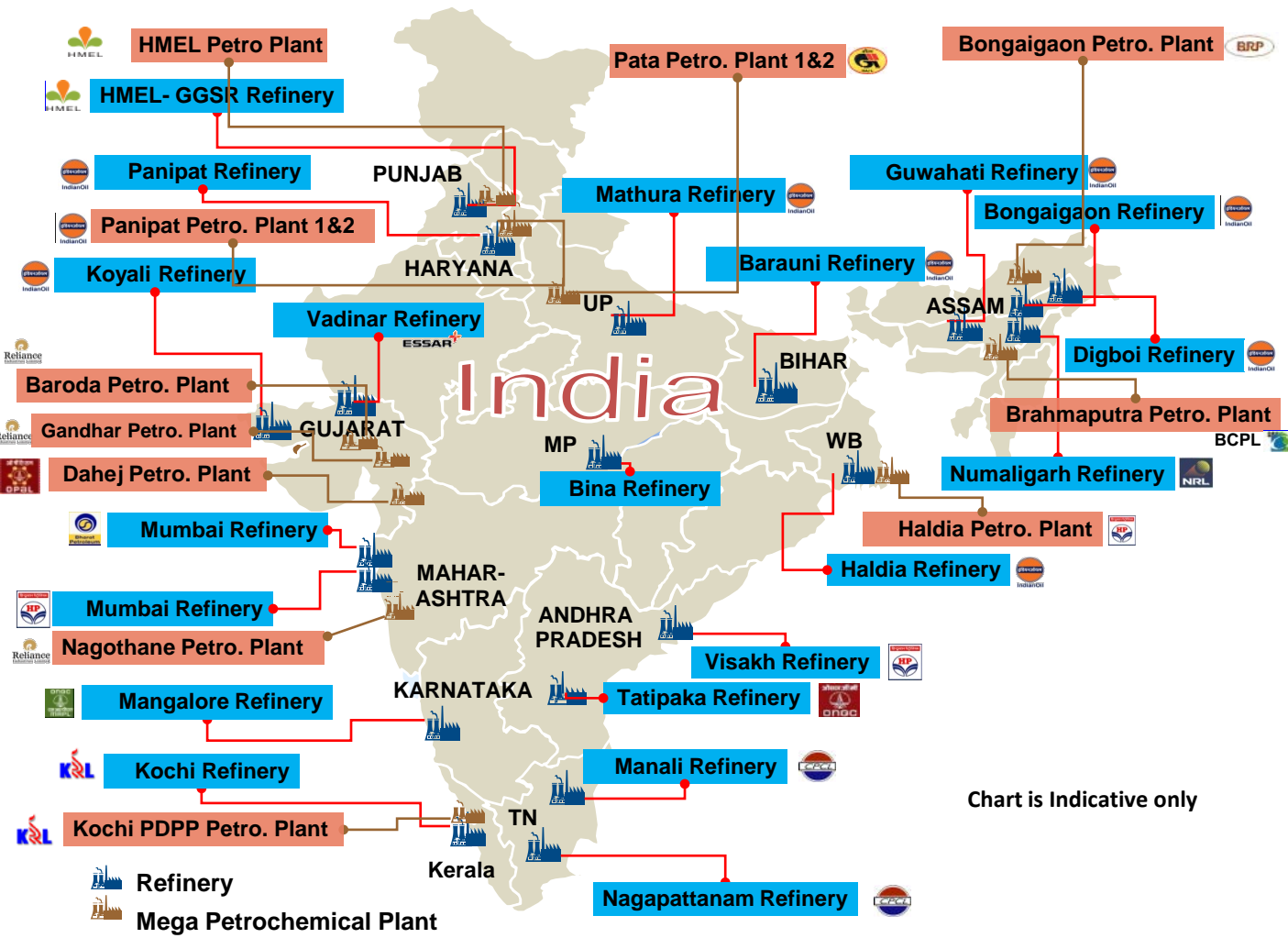


Chart is Indicative only

Milestones

- 20 out of 23 Refineries in India have EIL Footprints
- Installed 10 out of the 11 mega petrochemical complexes in India.
- Built combined refining capacity of more than 150 MMTPA (3 million BPD) in India
- Engineered 10 grass-root refineries.
- Forayed into new areas such as underground caverns for storages
- Work in progress on Rajasthan Refinery, West Coast and HMEL Cracker.

Select Overseas Projects across various segments

Sector	Country	Client
Refinery	Nigeria	Dangote
Refinery	Bangladesh	ERL
Refinery	Algeria	Sonatrach
Refinery	Kenya	KPRL
Refinery	Angola	Sonangol
Refinery	Oman	Sohar

* Recently EIL has completed DFR for Mongol Refinery

Sector	Country	Client
Oil & gas	UAE	NPCC, ADCO
Pipelines	UAE	GASCO
Pipelines	UAE	NPCC, ADCO

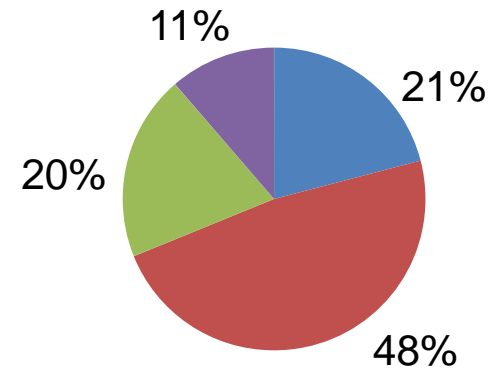
Sector	Country	Client
Fertilizers	Nigeria	Indo Rama
Fertilizers	Indonesia	PAU Fertilizer
Fertilizers	Bangladesh	BCIC
Fertilizers	Malaysia	Petronas Fertilizer (Kedah) Sdn. Bhd.
Non Ferrous	Bahrain	ALBA

Sector	Country	Client
LNG	Algeria	Sonatrach
Petrochemicals	UAE	BOROUGE
Petrochemicals	Oman	Orpic
Petrochemicals	Iran	NPC

Qualification	Count
Graduates in Engineering	2072
Post Graduates in Engineering	265
Doctorates in Engineering	13
Total Personnel with Engineering Qualification (Technical Manpower)	2350
Other Professionals (MBA/MCA/CA/ICWA/CS)	130

Role	Count
Project Management and Control	350
Engineering and Technology	1261
Construction	631
Commercial and Procurement	293
Company Mgmt, HR and Finance	279
Total	2814

Personnel Experience



■ 0 to 10 ■ 10 to 20 ■ 20 to 30 ■ 30 & above

- Average Age 40 years.
- Average Attrition Rate < 1 % per year (Past 3 FYs)
- Approx 12% are Female employees. Out of these 73% are Technical.
- 4.5 Million Man-hours are available annually in EIL offices.
- 1.5 Million Man-hours are available annually at various construction sites.

As on 31st March 2021

Experienced Leadership: Executive Directors (as on 31st Mar 2021)



Mr. R.K. Sabharwal
Director
(Commercial) and
C&MD (Additional
Charge)

- More than 33 years of rich experience. Well conversant with various aspects of international trade, EXIM procedures, taxation, legal aspects etc. and has proven competence in systems development.
- He has been involved in finalizing e-enabling strategies including e-procurement, development of suitable commercial procedures, finalization of detailed contractual terms for domestic and global commerce.



Mr. Sunil Bhatia
Director (Finance)

- He has varied experience of over 32 years in a wide array of domains including Projects, Finance, Manufacturing & Marketing.
- He joined NFL in 1986 and worked in various capacities in the Finance Department. Thereafter, he served in various capacities at the NFL's Corporate Office and was made Finance Head in August 2013. Subsequently, in August, 2015, he was posted as CFO at Ramagundam Fertilizers and Chemicals Limited (RFCL)



Ms. Vartika Shukla
Director
(Technical)

- Over 32 years of extensive consulting experience comprising Design, Engineering and Implementation of complexes in Refining, Gas Processing, Petrochemicals, Fertilizers etc. She has led to the successful completion of many prestigious projects for clients both in India and Overseas.
- She has wide spectrum of experience across diverse functions covering Process Design, R&D and other engineering disciplines. She has been steering several new Initiatives in the areas of BioFuels, Digitalization, Energy Efficiency, Make In India and StartUp Initiative of EIL. She is credited with forging several Collaborative Partnerships for expanding the Technology Portfolio of EIL.



Mr. S K Handa
Director (Project)

- More than 35 years of experience in the field of Process Design, Technology Development & its commercialisation, Engineering Services & Business Development
- He has been associated with many green field & brown field projects across entire hydrocarbon value chain in midstream & downstream sectors.



Mr. Ashok K Kalra
Director (HR)

- More than 33 years of rich experience. He has been associated with HR directorate since 2007 after working for more than 21 years in Projects / Construction for Refineries, Petrochemicals, Pipelines, Infrastructure, etc.
- He has experience in all facets of HR functions which involved Formulating HR Vision, Mission & Objectives, Organization Restructuring, Institutionalising Leadership Development Programme, Implementing Rajbhasha Policy, Transforming HR as a Strategic Partner in the company's operations, digitization of HR Processes & Policies, Corporate Planning, Corporate Branding and CSR.

Experienced Leadership: Non-Executive Directors (as on 31st Mar 2021)



Mr. B N Reddy
Govt Nominee



- Mr. B N Reddy has been appointed as a Government Nominee Director on the Board effective May 27th '2019. He is an IFS Officer and has served in various Indian Missions in Indonesia, Lao-PDR, New York, Malaysia, Geneva , Nigeria. He has also served in MEA in the Administration Division and subsequently as the Director/Joint Secretary to the External Affairs Minister of India. He has presently assumed charge as Joint Secretary(I/C) in the Ministry of Petroleum and Natural Gas.

Mr. Sunil Kumar
Govt Nominee



- Shri Sunil Kumar is a Government Nominee Director of our Company, He is an IRAS Officer (1995 batch) and is presently posted as Joint Secretary (Refineries), Ministry of Petroleum & Natural Gas, New Delhi since May, 2019. He is Bachelor of Technology (Petroleum Energy) from IIT(ISM), Dhanbad, Financial Management from NIFM, Faridabad, Masters in Business Administration from BI, School of Management, Oslo, Norway, Executive European MBA from ESCP-EAP, Paris, France, Masters Diploma in Public Administration from IIPA, New Delhi and Logistic Simulation and Planning from Beijing Jiaotong University, Beijing, China. As Joint Secretary (Refineries), he is looking after the matters related to Refineries, Auto Fuel Policy, Petrochemicals, Import/export of crude oil and other petroleum products; Bio Fuels, Renewable Energy and Conservation, Integrated Energy Policy; Climatic Change & National Clean Energy Policy, Before joining MoP&NG, he has worked with Indian Railways in various capacity including Director Finance Expenditure in Railway Board and Chief Project Manager of Accounting Reform Project of Indian Railways.

Mr. M. Arulmurugan
Non-official



- Mr. M. Arulmurugan is a Non-Official Independent Director of Engineers India Limited since July 17, 2019. Registered Professional Engineer in Structural Engineering and Seismic Expert. Fellow in Institution of Valuer, Registered Valuer under Income Tax Act, Wealth Tax Act & Gift Tax Act category, valuer under O/O of the Custodian Ministry of Finance, Valuer for Major Banks and for Public Sector Undertakings. Member American Society of Civil Engineers, Indian society of Earthquake Technology, Indian Concrete Institute, Fellow in Association of Consulting Civil Engineers(I). Completed Various RCC structures with seismic resistant technology including structures for Tsunami affected people in Tamilnadu. Social Activist, Instrumental in retaining separate regional reservation quota for Professional students from backward areas. Honorary president in Welfare Associations, Guest Lecturer for NOT Architecture dept, President Registered Engineer Association.

EIL's Board of Directors comprise of qualified & reputed individuals with long-standing experience across industry verticals

- **12th CIDC Vishwakarama Awards 2021 for Best Construction Projects** - Establishment of Main Campus of Central University of Punjab in Bathinda received on March 7, 2021
- **12th CIDC Vishwakarama Awards 2021 for Best Practices in Construction HSE** - MS Block BPCL Kochi Refinery project received on March 7, 2021
- **FICCI Chemical and Petrochemical Awards 2021 special award** - In the category of 'Sustainability Award for Best Green Process' received on March 17, 2021.
- **5th Edition of India Refining Summit** – Shri R. K Sabharwal, Chairman & Managing Director In-charge was presented the Life Time Achievement Award by Shri. Tarun Kapoor, IAS, Secretary (MoPNG) for his contribution to the Oil and Gas Sector on March 25, 2021.
- **FIPI Oil & Gas Industry Awards 2020 in 'Woman Executive of the Year'** - Ms. Rima Kundu, Deputy General Manager (Instrumentation) on January 27, 2021



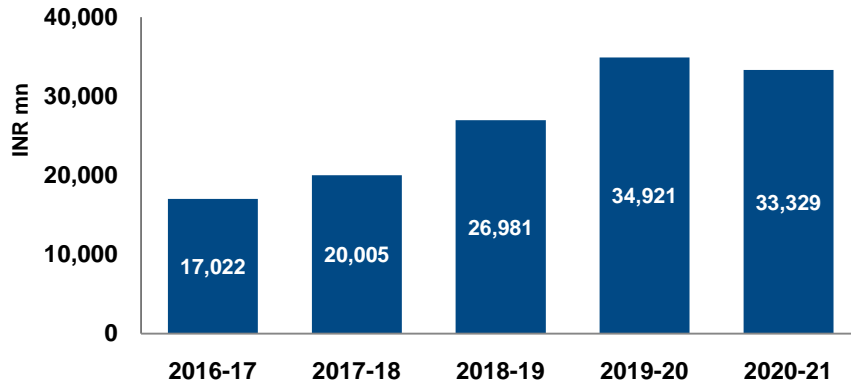
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Financials and Order Book Overview

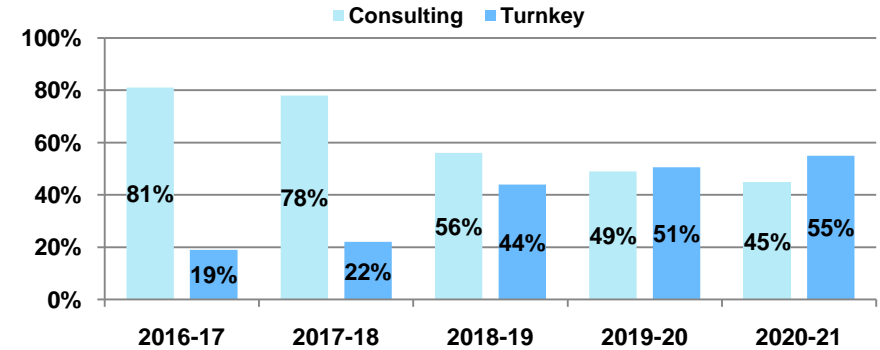
Financial and Operating Track Record - Consolidated



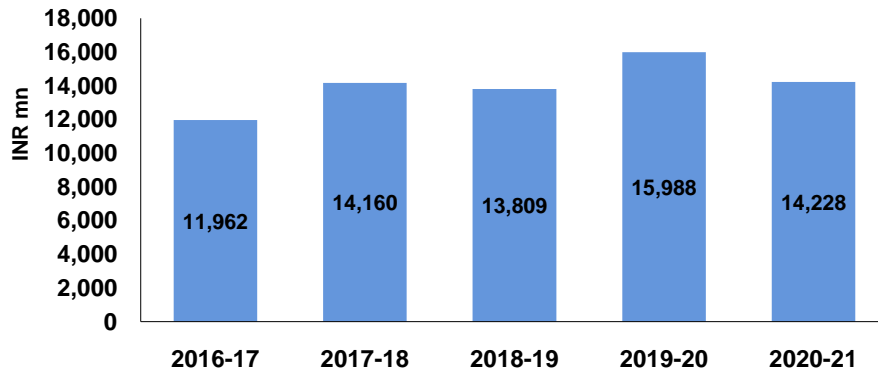
Total Income (INR mn)*



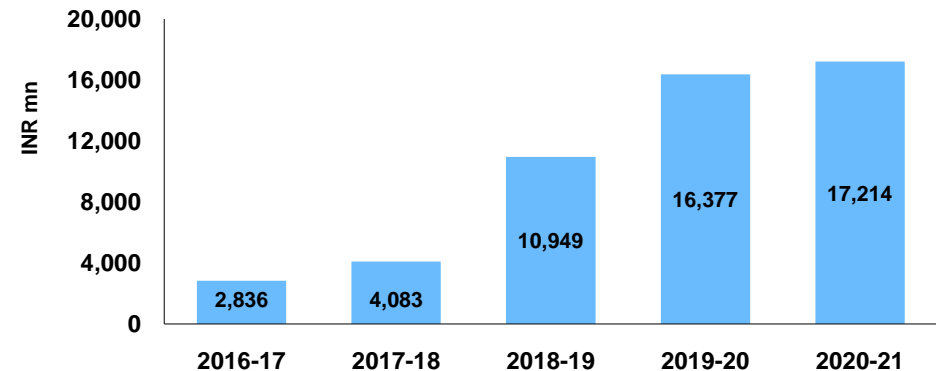
Revenue Segmentation*



Consultancy & Engineering Revenue (INR mn)*



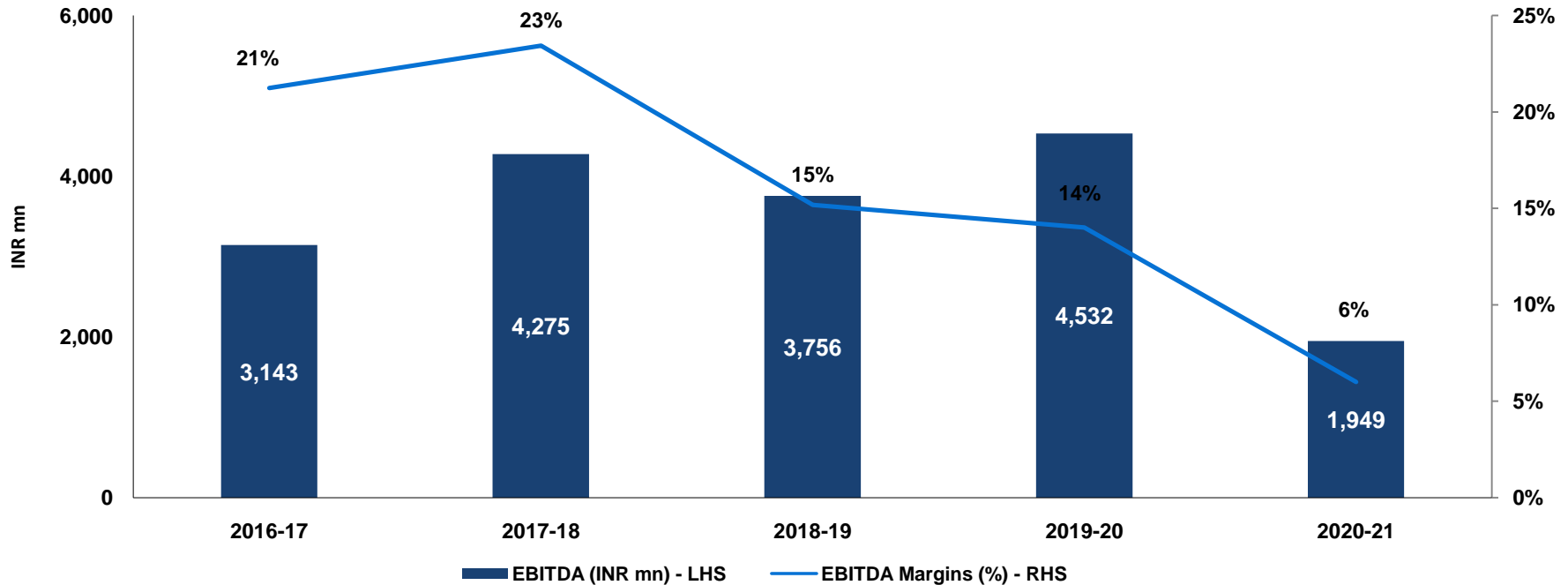
Turnkey Projects Revenue (INR mn)*



** Revenue does not include Other Income

• Note: All figures have been taken on a consolidated basis

EBITDA## Performance (INR mn)*



Note: All figures have been taken on a consolidated basis

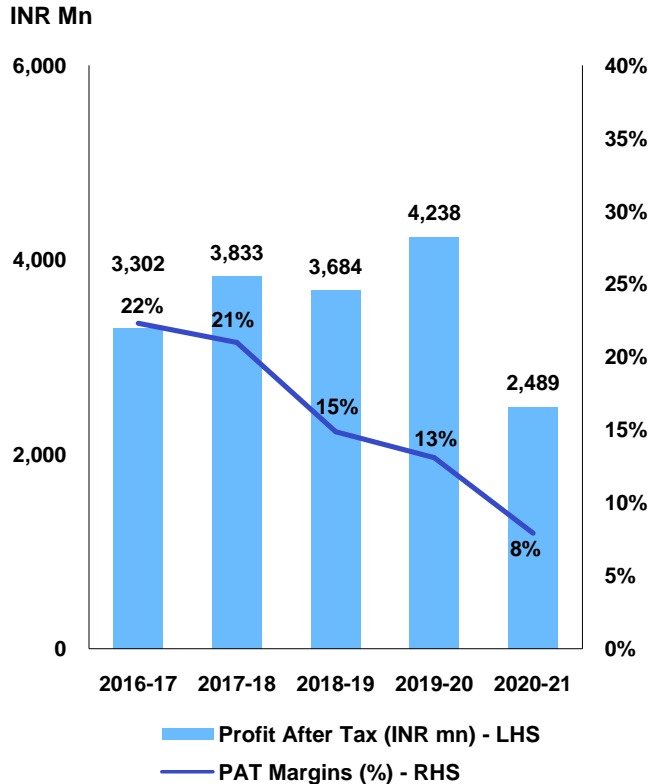
EBITDA: Earnings Before Interest, Tax, Depreciation and Amortization (does not include Other Income)

EBIDTA for FY 20-21 shown above include adjustment for exceptional items. EBIDTA excluding exceptional items is approx 11%.

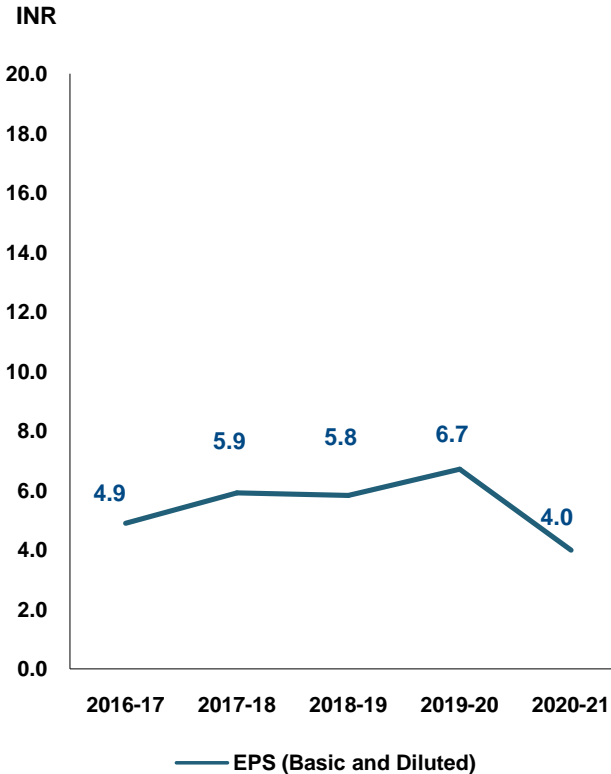
Financial and Operating Track Record - Consolidated



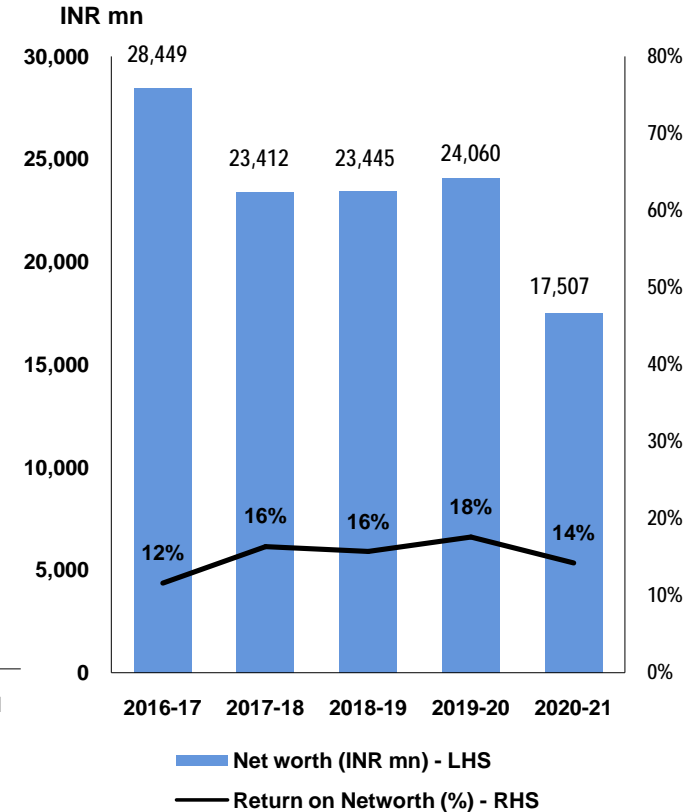
Profitability (INR mn)*



Earnings per Share – EPS (INR)*

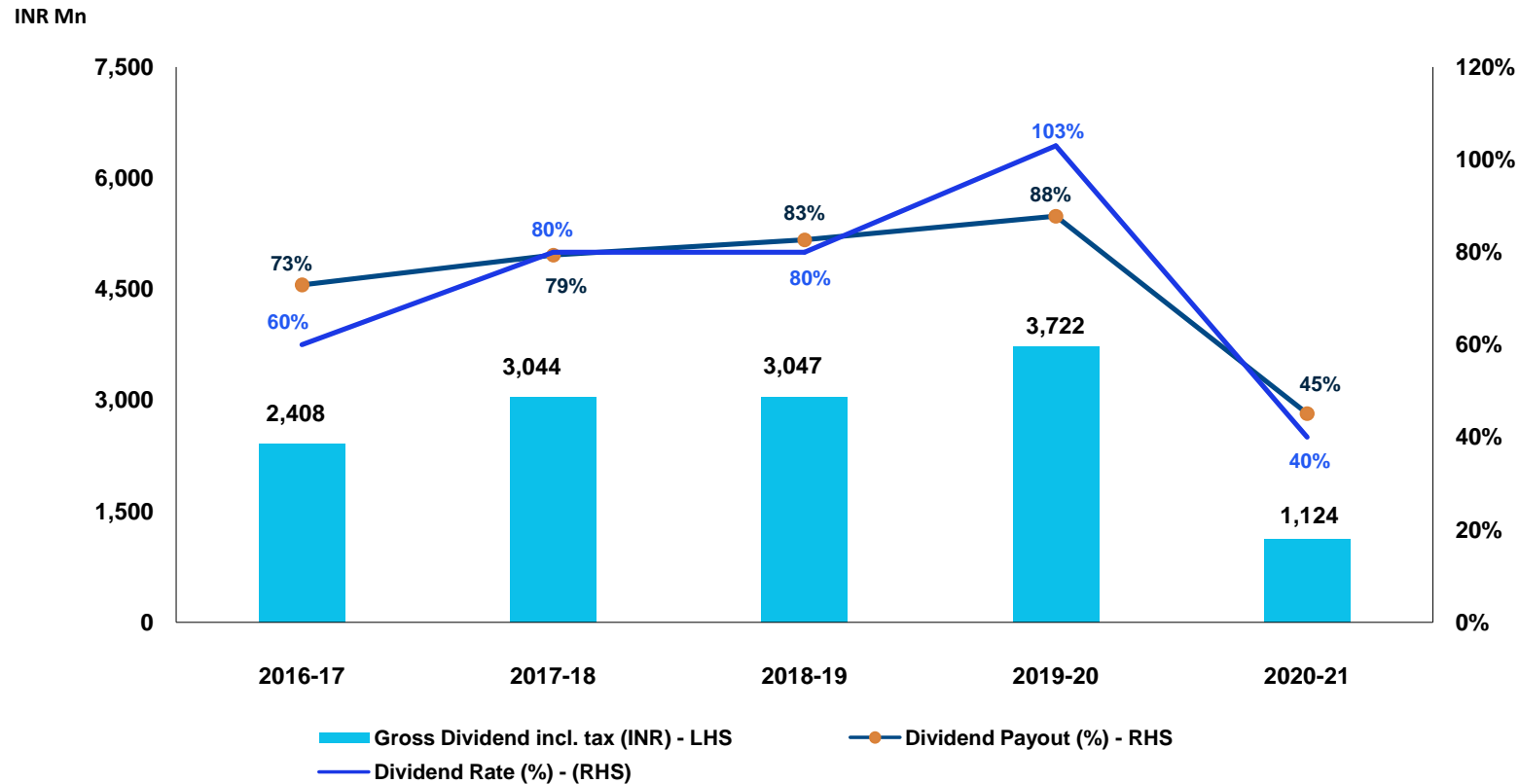


Return on Net Worth (%)*



* Note: All figures have been taken on a consolidated basis

Dividend Distribution (INR mn)*



* Note: All figures have been taken on a consolidated basis
Dividend Payout calculated as a percentage of Profit After Tax (PAT)



Consistent Dividend Track Record

Annual Performance Summary – Standalone



Rs Mn

TURNOVER	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
Consultancy	13,833	15,653	13,494	13,793	11,650	10,074
Turnkey	17,214	16,377	10,949	4,083	2,836	5,036
Consultancy + Turnkey	31,047	32,030	24,443	17,876	14,486	15,110
Other Income	1,949	2,580	2,251	1,795	2,237	2,478
Total Income	32,996	34,611	26,694	19,671	16,723	17,588

SEGMENT PROFITS	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
Consultancy	3,799	4,989	3,894	4,303	3,592	2,646
Turnkey	558	655	628	754	1036	122
Consultancy %	27%	32%	29%	31%	31%	26%
Turnkey %	3%	4%	6%	19%	37%	2%

PAT	2020-21	2019-20	2018-19	2017-18	2016-17	2015-16
PAT	2595	4302	3701	3779	3250	2762
PAT %	8%	13%	15%	21%	22%	18%

Note: All figures are on standalone basis and rounded off to nearest digit

Quarterly Performance Summary – Standalone



Rs Mn

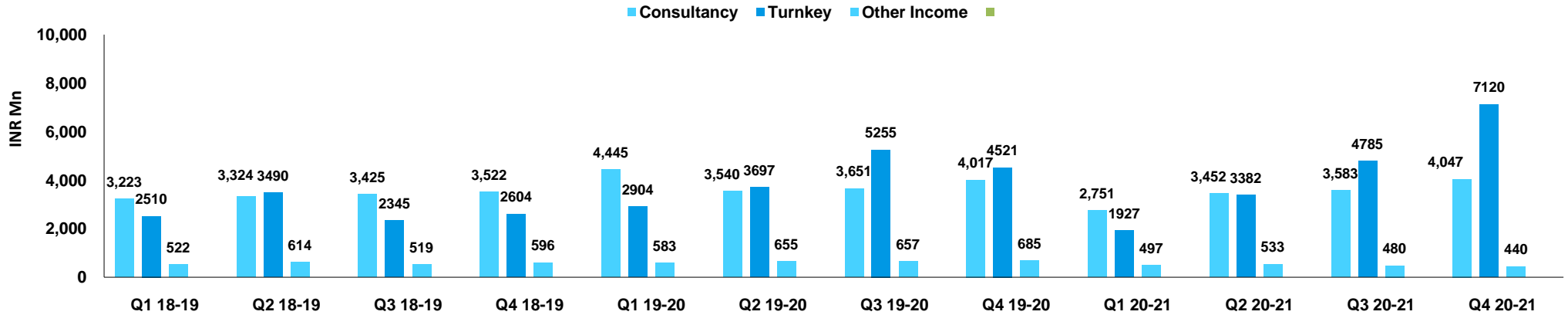
TURNOVER	Q1	Q2	Q3	Q4	H1	H2	9M	Annual
Consultancy – Domestic	2052.1	2580.2	2665.0	3095.3	4632.3	5760.3	7297.3	10392.6
Consultancy - Overseas	699.1	872.2	917.8	951.5	1571.3	1869.3	2489.1	3440.6
Consultancy Total	2751.2	3452.4	3582.8	4046.8	6203.6	7629.6	9786.4	13833.2
Turnkey	1927.2	3381.7	4784.5	7120.3	5308.9	11904.8	10093.4	17213.7
Consultancy + Turnkey	4678.4	6834.1	8367.3	11167.1	11512.5	19534.4	19879.8	31046.9
Other Income	496.6	532.6	479.7	439.9	1029.2	919.6	1508.9	1948.8
Total Income	5175.0	7366.7	8847.0	11607.0	12541.7	20454.0	21388.7	32995.7
SEGMENT PROFIT	Q1	Q2	Q3	Q4	H1	H2	9M	Annual
Consultancy	392.5	933.5	909.9	1563.5	1326.0	2473.4	2235.9	3799.4
Turnkey	29.7	62.7	65.1	400.5	92.4	465.6	157.5	558.1
Total	422.2	996.2	975.0	1964.0	1418.4	2939.0	2393.4	4357.5

• Note: All figures are on standalone basis and rounded off to nearest digit

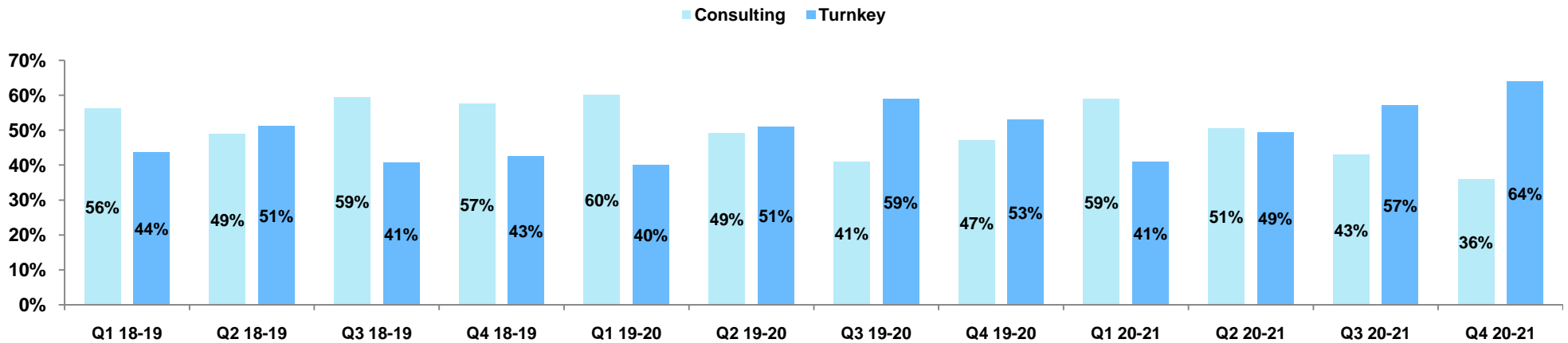
Quarterly Performance Track Record - Standalone



Total Income



Revenue Mix (Consultancy Vs Turnkey)

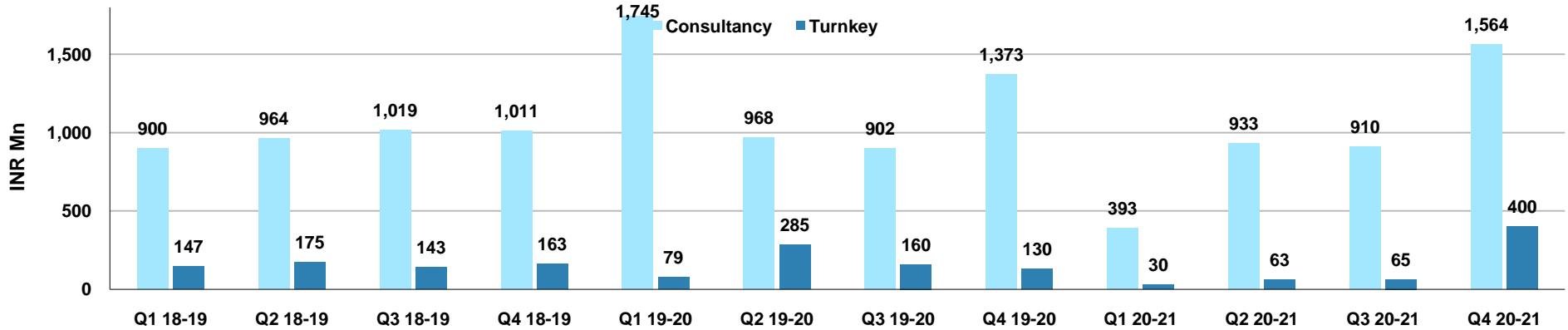


Note: All figures have been taken on a standalone for EIL

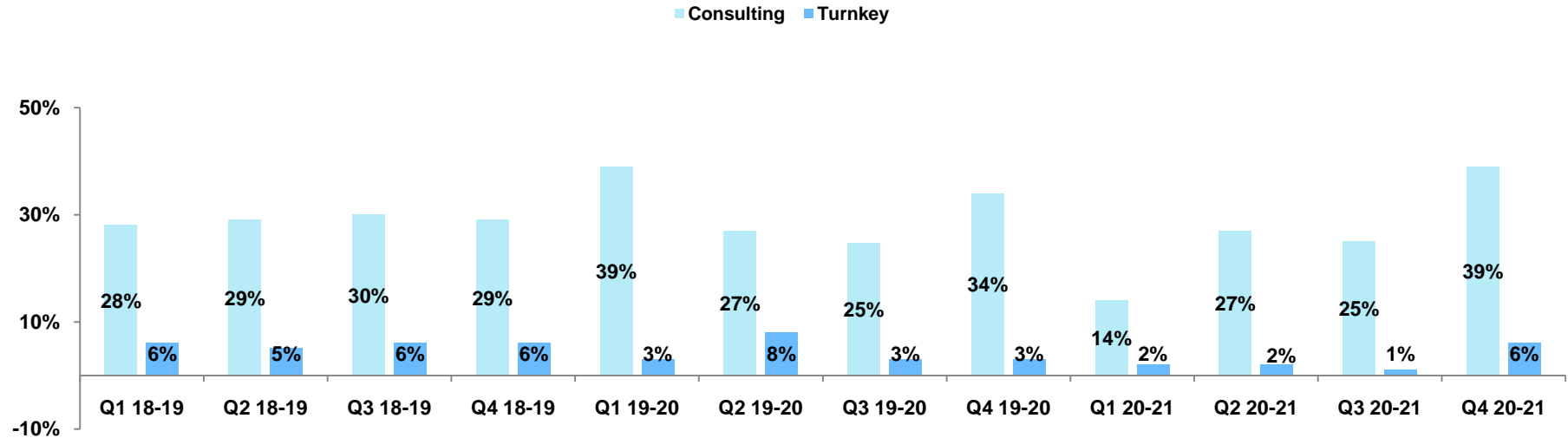
Quarterly Performance Track Record – Standalone



Segment Wise Operating Profit



Segment Wise Profit %



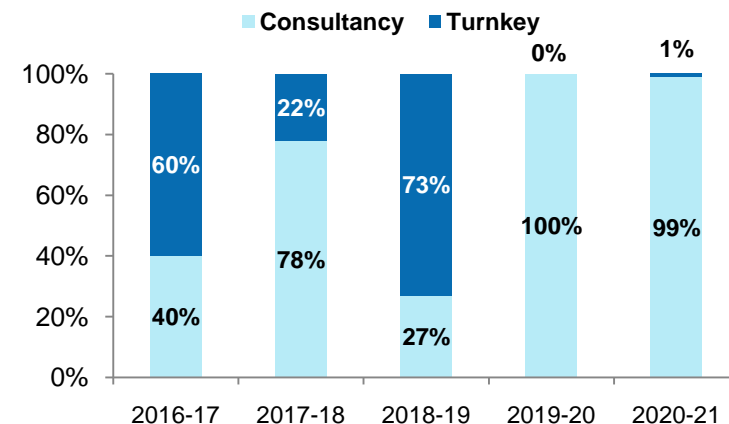
Note: All figures have been taken on a standalone for EIL

Business Secured and Order Book – Standalone



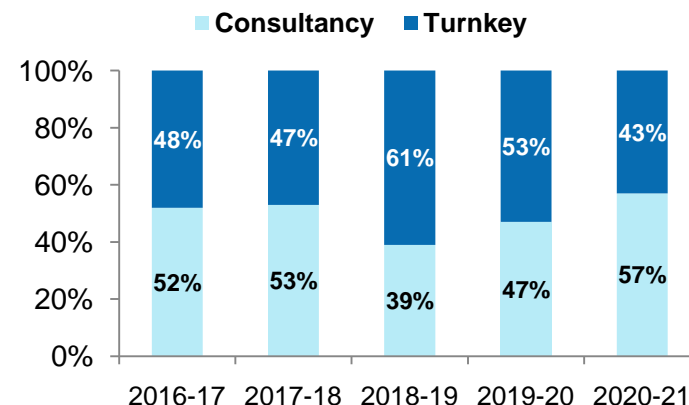
Rs Mn

Business Secured	FY 20-21	FY 19-20	FY 18-19	FY 17-18	FY 16-17
Consultancy (domestic)	14,550	8,119	14,942	13,572	20,319
Consultancy (overseas)	1,011	8,053	911	3,036	2,644
Consultancy Total	15,562	16,172	15,853	16,608	22,963
Turnkey	130	0	43,052	4,797	34,118
Total Business secured	15,692	16,172	58,905	21,405	57,081



Rs Mn

Order Book	March 21	March 20	March 19	March 18	March 17
Consultancy	45,816	44,561	43,124	41,739	40,208
Turnkey	34,003	50,993	68,763	36,992	37,411
Total Order Book	79,819	95,554	1,11,887	78,731	77,619
Consultancy %	57%	47%	39%	53%	52%
Turnkey %	43%	53%	61%	47%	48%

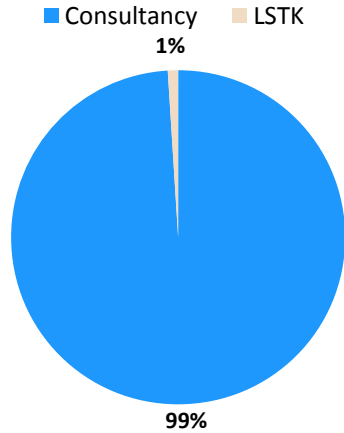


Note : Data on unconsolidated basis

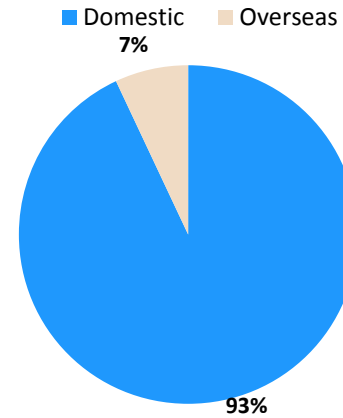
Orders Secured Break up - Standalone



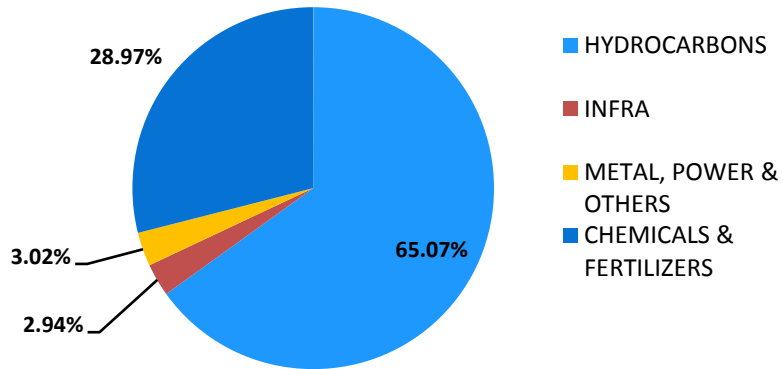
Consultancy Vs LSTK



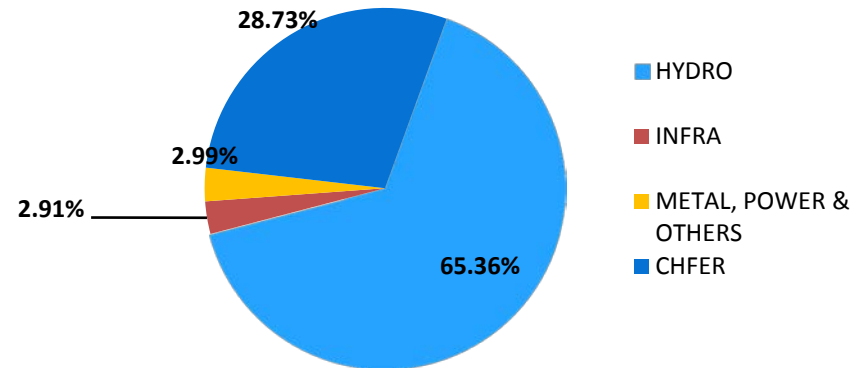
Consultancy Domestic Vs Overseas



Consulting Segmental Break up



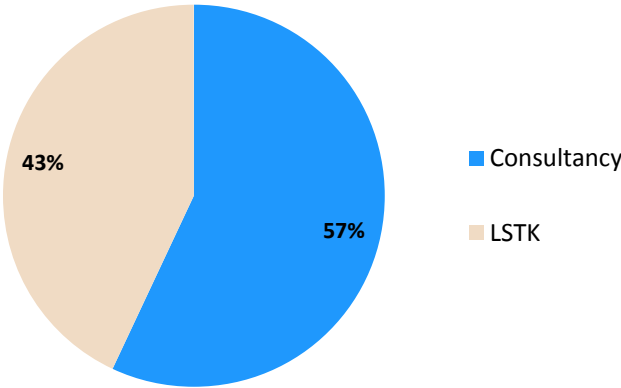
Total Orders Segmental Break up



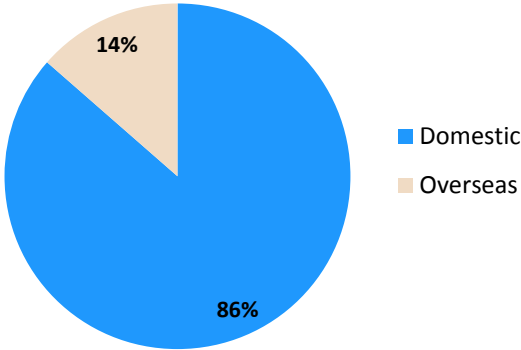
Note : Data on unconsolidated basis



OBP: Consultancy Vs LSTK



OBP: Domestic Vs Overseas



Note : Data on unconsolidated basis



4

Major Order secured in FY 2020-21

Service Type	Project scope	Client	Contract Value (Rs. Million)	Award Date	Completion Date
Domestic					
Consultancy	Post Bid Engineering Services to BHEL for EPC tender for Standby SRU(525TPD) Train of IOCL Paradip Refinery	BHEL	296	Feb 2021	Mar 2023
Consultancy	Consultancy for Overall Project Management and EPCM Services for Capacity Expansion of Panipat Refinery from 15MMTPA to 25MMTPA (P-25 Project) (Phase – III)	IOCL	6169	Mar 2021	Jan 2025
Consultancy	PMC Services for Krishnagiri-Coimbatore section of KKBMP-II Project	GAIL	233	Mar 2021	Mar 2024
Consultancy	EPCM Services for MR-II Project at HPCL Mumbai Refinery (Change Order)	HPCL	100	Sep 2020 (considered in Mar 2021)	-
Overseas					
-	-	-	-	-	-

Service Type	Project scope	Client	Contract Value (Rs. Million)	Award Date	Completion Date
Domestic					
Consultancy	EPCM Services for Coker- B Revamp under Barauni Refinery Capacity Expansion Project	IOCL	742	Nov 2020	May 2024
Consultancy	PMC Services for Part-B (Nagpur-Jharsuguda & NTPC Korba Spur Section) of Mumbai-Nagpur-Jharsuguda Pipeline (MNJPL) Project	GAIL	490	Dec 2020	Jun 2023
Consultancy	Provision of manpower to assist the Engineer on MAHSR C-4, MAHSR C-6 and MAHSR P-4 Contract Packages of Mumbai-Ahmedabad High Speed Rail Project	NHSRCL	307	Dec 2020	Jun 2021
Consultancy	Supply of License, Basic Engineering Design Package (BEDP), Catalyst and Other Related Services for Sulphur Recovery Unit (SRU) for Numaligarh Refinery Expansion Project (NREP)	NRL	243	Sep 2020 (considered in Dec 2020)	Nov 2025
Overseas					
Consultancy	Various engineering services assignments under empanelment agreement with Client (2 nos)	ADNOC Offshore	22 36	Oct 2020 Dec 2020	Jan 2021 Sep 2021

Service Type	Project scope	Client	Contract Value (Rs. Million)	Award Date	Completion Date
Domestic					
Consultancy	EPCM Consultancy Services for 500 KTA PDH-PP Project (Rate Reimbursable)	GAIL India Ltd.	4485	Sept 2020	Sept 2024
Consultancy	Owner's Engineer Services for 6.0 MMTPA Mechanized Production and Evacuation Facilities at Kurmitar Iron Ore Mines	Odisha Mining Corporation	219	Sept 2020	Sept 2023
Consultancy	PMC for Construction of New Domestic Terminal Building and associated works at Leh Airport, J&K (Change Order)	Airports Authority of India	105	June 2020 (Change Order settled in Sept 2020)	Sept 2021
Overseas					
Consultancy	Project Management Consultancy Services for "Installation of ERL Unit-2" (Contract Amendment No. 1 – Change Order)	Bangladesh Petroleum Corporation (BPC)	867	Change Order settled in Aug 2020	June 2024

Service Type	Project scope	Client	Contract Value (Rs. Million)	Award Date	Completion Date
Domestic					
Consultancy	Project Management Consultancy Services for Dhamra-Haldia Pipeline Project	GAIL India Ltd.	317	May 2020	Nov 2022
Consultancy	Detailed Engineering Consultancy and Construction Supervision for Setting Up Nuclear Fuel Complex (Change Order)	Department of Atomic Energy, Nuclear Fuel Complex-Kota	291	June 2020 (Change Order award date)	Mar 2021
Turnkey	Coker block of Resid Up-gradation Project (Change Order)	Chennai Petroleum Corporation Limited (CPCL)	129	Change Order settled in June 2020	Project already completed
Overseas					
Consultancy	Various small assignments under call off contracts	ADNOC Offshore	36	Apr 2020	2020-2021



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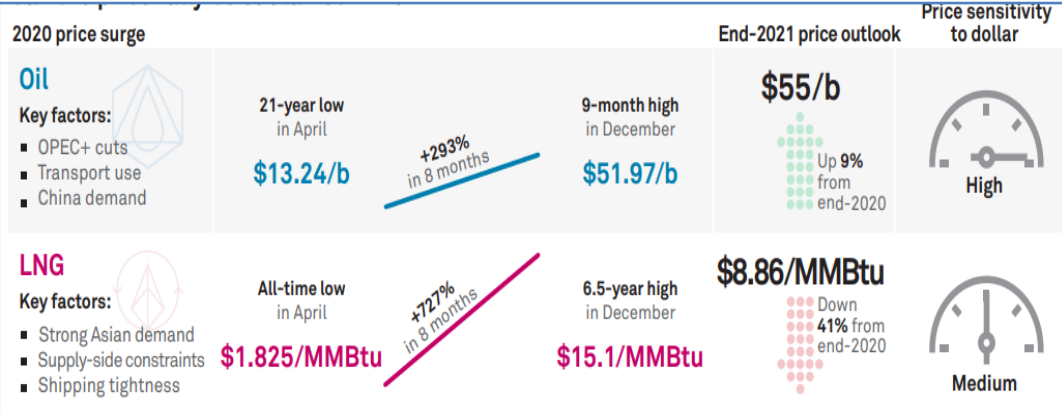
Orders in Hand and Outlook

Project	Client	Project Location
Refinery Projects		
Panipat Refinery Expansion (15 to 25 MMTPA)	IOCL	Panipat
PRFCC, PP and SRU Project	BPCL	Rasayani & Mumbai
BS-VI Project	MRPL	Mangalore
Visakh Refinery Modernization Project	HPCL	Visakhapatnam
Rajasthan Refinery Project	HPCL	Rajasthan
Mumbai Refinery Expansion Project	HPCL	Mumbai
Bio Refinery Project	Assam Bio Refinery Pvt Ltd	Numaligarh
Coker-B Revamp Project	IOCL	Barauni

Project	Client	Project Location
Petrochemical Project		
PP Unit	GAIL	Pata
Guru Gobind Singh Polymer Addition Project	HMEL	Bhatinda
500 KTPA Petrochemical Project	GAIL	Usar / Uran
Methanol & Formalin Plant	APL	Namrup, Assam
LNG / LPG Cavern		
80,000 MT LPG Cavern	HPCL	Mangalore
LNG Import, Storage & Regasification Terminal Project,	HSEPL	Chhara, Gujarat,
Pipeline Projects		
Dobhi-Durgapur-Haldia Pipeline Project	GAIL	Dobhi-Durgapur-Haldia
Vijaipur Auraiya Pipeline Project	GAIL	Vijaipur Auraiya
Kochi-Salem LPG Pipeline Project	KSPPL	Kochi

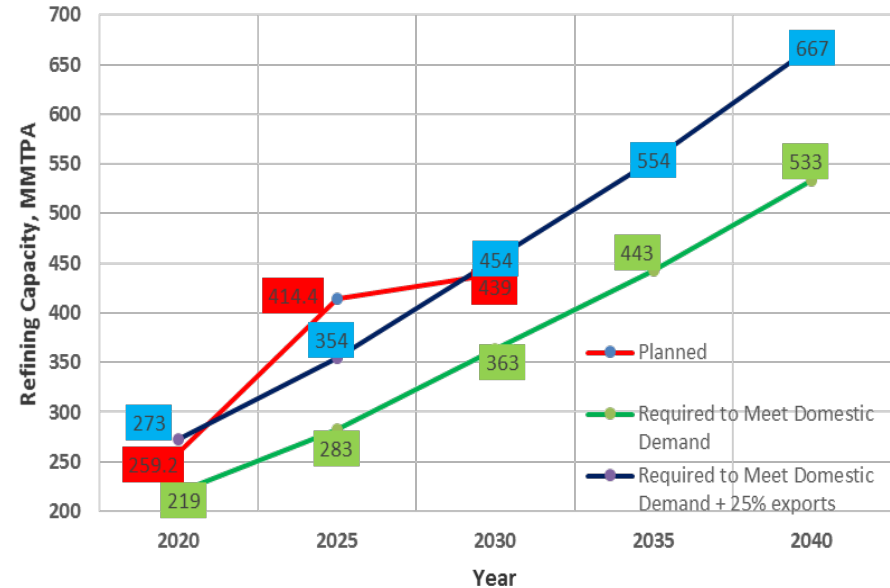
Project	Client	Project Location
Infrastructure Projects		
Condition Assessment & Feasibility Study, Entry Level Activities Under Namami Gange Programme, NMCG	NMCG	UP & Bihar
Construction of UIDAI Data Centre Complex at Manesar and Bengaluru and Office Building at Delhi	UIDAI	Different locations across India
Overseas Projects		
Eastern Refinery Limited Unit –II Project	BPC	Bangladesh
Dangote Refinery & Petrochemical Project	DORC	Nigeria
PMC Services for Crude Oil Refinery in Mongolia	Mongol Refinery	Mongolia

Global OIL Outlook & Refining Capacity Outlook India



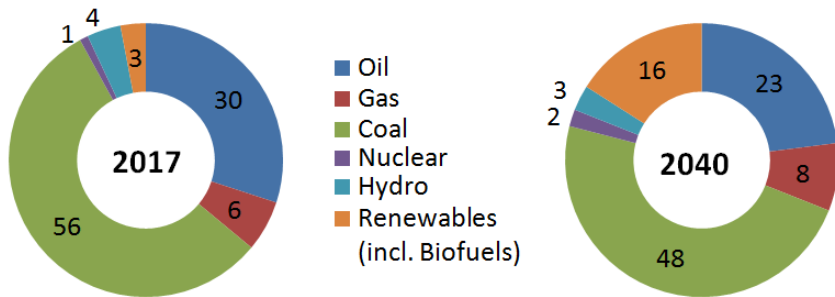
The petrochemical industry remains a pillar of growth over the forecast period. Ethane, LPG and naphtha together account for 70% of the projected increase in oil product demand to 2026.

Indian Refining Capacity-Outlook



Source: OPEC/IEA

Energy Mix (%) : India



Source: BP Outlook 2019

India to exhibit strong growth in APAC Region

Robust POL Demand driving Indian refining capacity (249 MMT) to projected 533 MMT by 2040

NG and Renewable share in Energy Mix to Rise to 15% by 2030

India's Chemical industry: Unleashing the next wave of growth



A consistent value creator with a positive outlook.

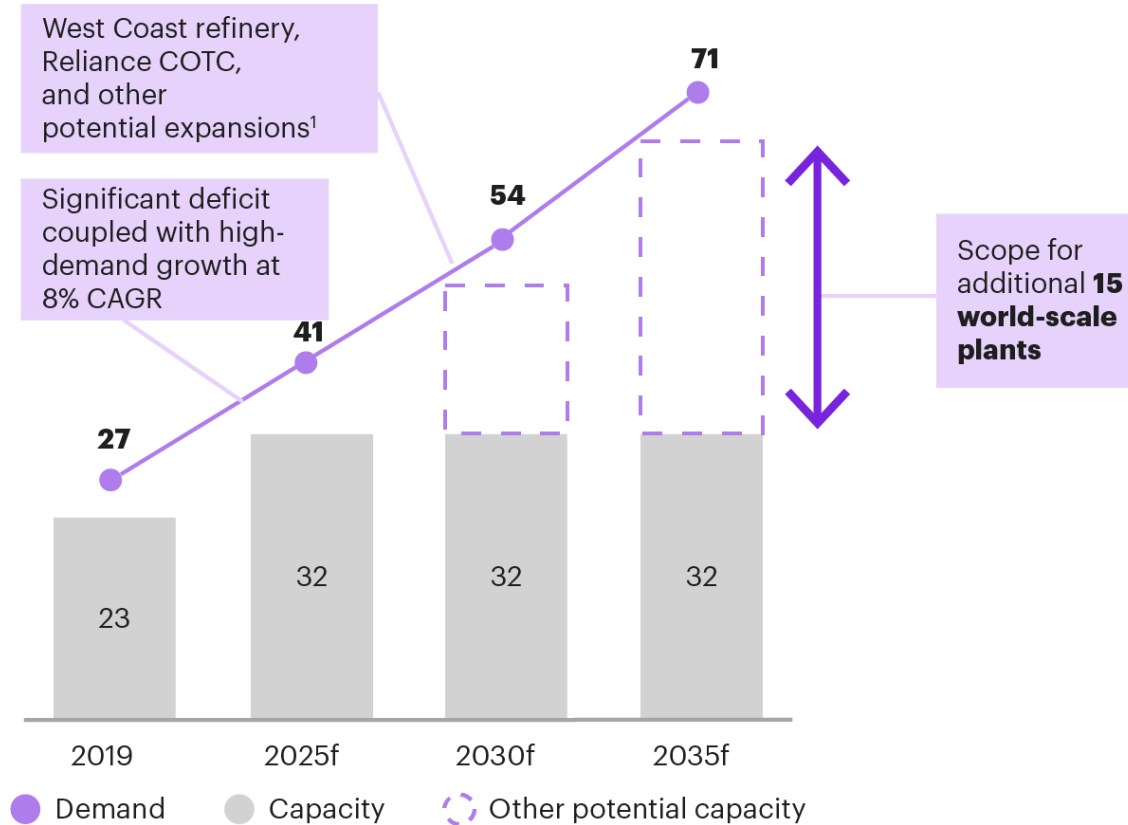
Uncertainty for the world, possibilities for India

Several global oil and gas majors are turning their sights on downstream chemical opportunities.

This may increase the focus on petrochemicals in India.

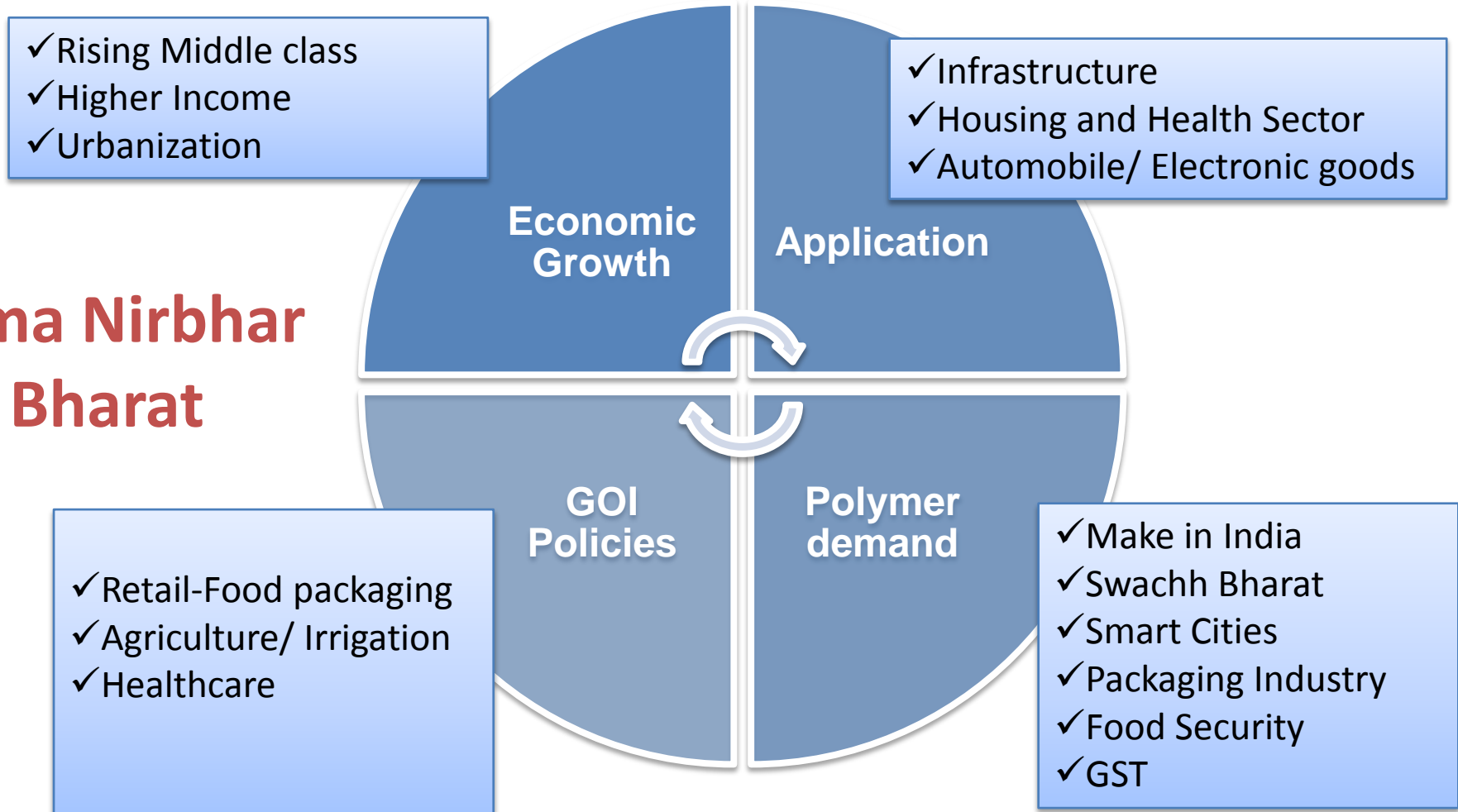
Higher investment in the sector could ease feedstock challenges and boost self-sufficiency.

Petrochemicals supply and demand in India (million metric tons)



¹ Reliance crude oil to chemicals

Atma Nirbhar Bharat



URBAN INFRASTRUCTURE

- India has a requirement of investment worth Rs 50 trillion (US\$ 777.73 billion) in infrastructure by 2022 to have sustainable development in the country.
- India is witnessing significant interest from international investors in the infrastructure space.
- Educational Sector: New IITs, IIM
- Health Care Sector: New AIIMS & Similar Hospitals

DATA CENTERS

- With more than 669 million Internet users presently and forecast to be USD5 trillion economy by 2024, India is estimated to generate massive data at explosive rates in the coming years.
- According to the Department of Telecommunications (DoT), the data consumption touched 300 PB between March 22 and March 28 2020. The COVID-19 pandemic has been a strong market enabler for digital transformation initiatives in private as well as public enterprises in India.
- Planned Investment is expected to reach approx. \$4 billion by 2024, growing at CAGR of 9% during 2018-2024. The country is witnessing investments in more than 15 facilities, which is expected to be operational in the next 2-3 years.

WATER & WASTE WATER MANAGEMENT

- Projected Investment Potential of about Rs 2,00,00 Cr by 2022
- Existing WWTP's, ETP's need refurbishment in Tier II & Tier III

ALTERNATIVE FUELS

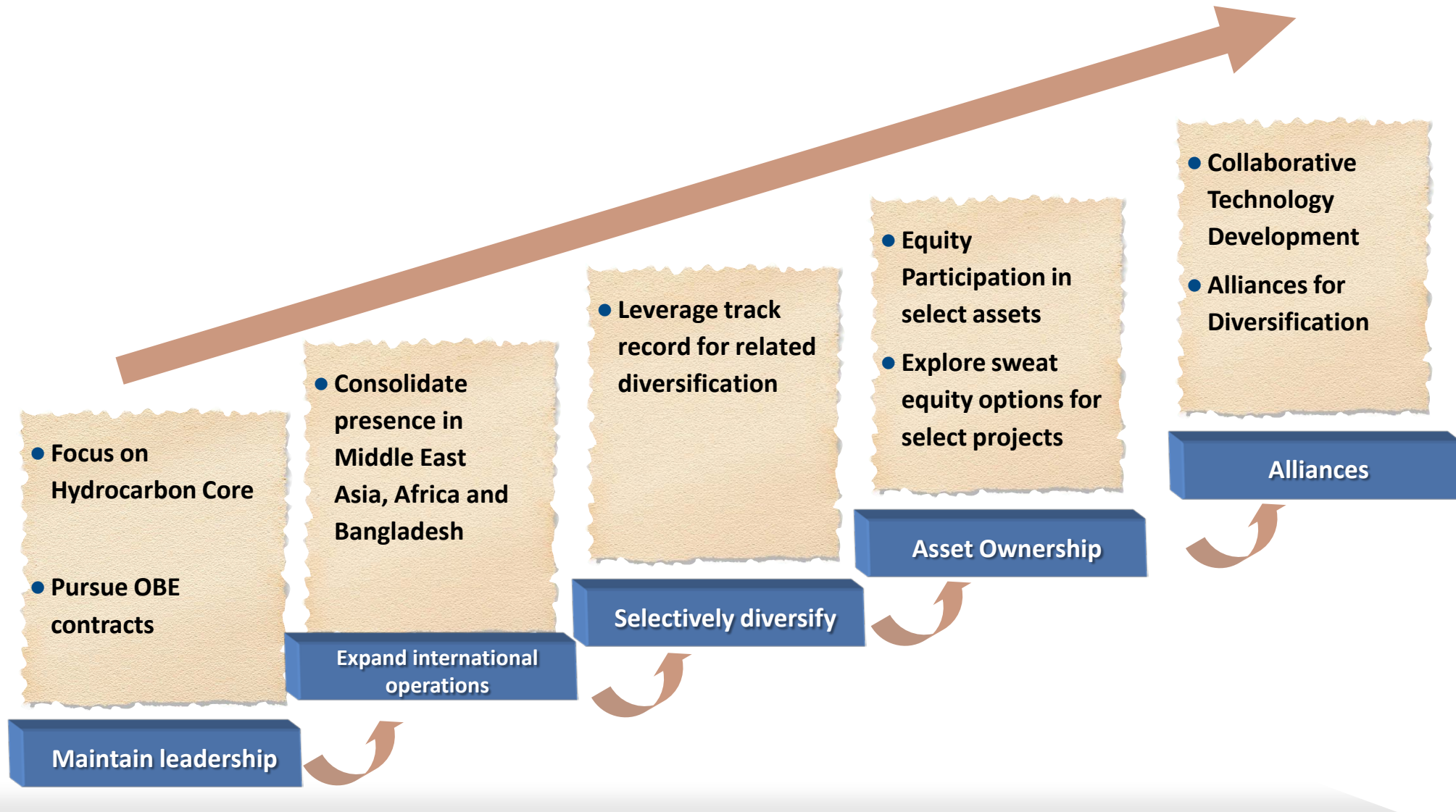
- New Bio Fuel Policy Announced by GoI
- GOI mandate to implement E5/E10/E20 by 2022
- Ethanol Plants under implementation
- Drop in Transport Fuels -Plants in Planning Stage
- EIL has engaged with the technology providers for its venture in to the Ethanol and Bio Fuels sector.

AIRPORTS

- India plans to open 100 additional airports by 2024.
- The AAI has announced a few developments in Indian Airports— construction of a new airport on a greenfield site in Hollongi (Arunachal Pradesh) by Nov'22, new integrated passenger terminal building expansion of Tiruchirappalli & Pune Airport (March'22), Guwahati International Airport (June'22), Maharaja Bir Bikram Airport (Early'21) and major expansion of Surat Airport (Dec' 2021).

DEFENCE

- Modernization of Defence Installations
- To pursue “ Make In India” initiative in NICHE explosive manufacturing process



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A pair of hands, one from the top and one from the bottom, are shown holding a small globe of the Earth. The hands are positioned as if they are gently cradling the planet. The background is a gradient of teal and blue, with a faint grid pattern. The text "THANK YOU" is overlaid in the center of the image.

THANK YOU