



THE RAMCO CEMENTS LIMITED

Corporate Office:

Auras Corporate Centre, V Floor,
98-A, Dr. Radhakrishnan Salai, Mylapore,
Chennai – 600 004, India.

Phone: +91-44 28478666, Fax: +91-44 28478676

Web Site: www.ramcocements.in

Corporate Identity Number: L26941TN1957PLC003566

27 November 2021

National Stock Exchange of India Limited,
Exchange Plaza, Bandra-Kurla Complex,
Bandra (E), Mumbai – 400 051.

Scrip Code:RAMCOCEM

BSE Limited,
Floor 25, “P.J.Towers”,
Dalal Street,
Mumbai – 400 001.

Scrip Code:500260

Dear Sirs,

Sub: Intimation of Investor Meet

Pursuant to Clause 15 of Schedule III, Part A, Para A read with Regulation 30 of SEBI (LODR) Regulations, 2015, we wish to inform you that a Corporate Presentation is scheduled today (27.11.2021) for a group of investors. A copy of the presentation is attached.

Thanking you,

Yours faithfully,

For **THE RAMCO CEMENTS LIMITED,**

K.SELVANAYAGAM
SECRETARY

Encl : As above



The Ramco Cements Limited

Consolidating Strengths. Ready for future

Corporate Presentation

November 2021

Macro Economic Overview

Overview of Economy

- India's real GDP growth for FY22 is projected at 9.5%, as per Economic Survey 2020-21
- In October 2021, World Economic Outlook (WEO) forecast India's growth projections as 8.3% in 2021 and 9.6% in 2022 on calendar year basis
- India is the World's second largest cement producer
- India's capacity is ~ 544 million tons, which is around 8% share of the Global installed capacity

Growth Drivers

- Revival of demand from rural housing, PMAY Scheme, commercial and industrial construction, infrastructure development by private and Government
- The per-capita consumption of cement in India is 195 Kg against Global average of 500 Kg, showing significant potential for the growth of industry, which is around 40% of world average.
- Continued growth in middle class and urbanization
- Continued thrust by Gol on vaccination against CoVID 19

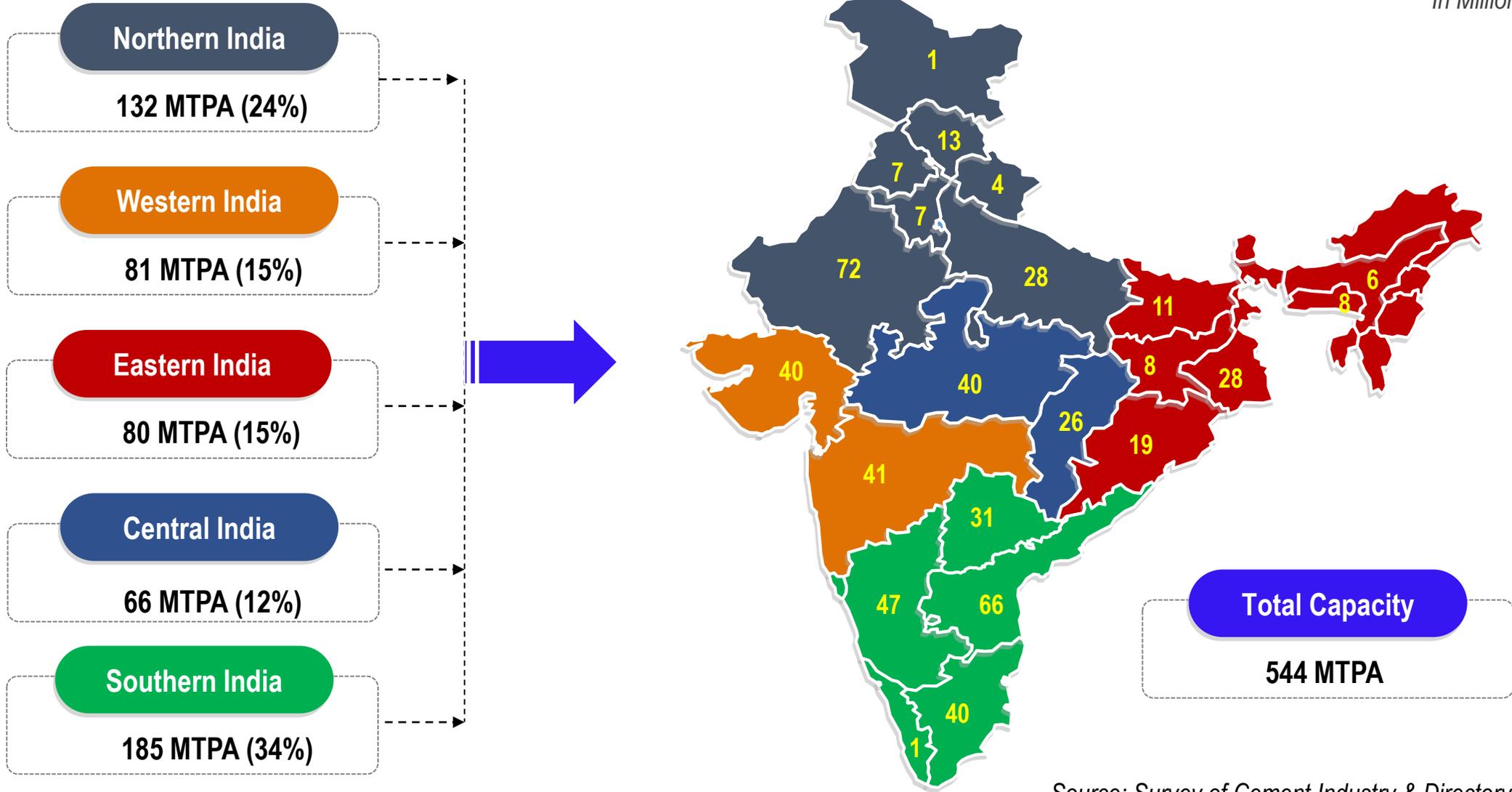
Large Concentration

- The top 10 cement companies account for 67% of the total capacity
- Around 70% of total capacity is located in 8 states
- Rajasthan holds the highest cement capacity in India

Cement Industry in India



In Million Tons



Source: Survey of Cement Industry & Directory / www.iebf.org

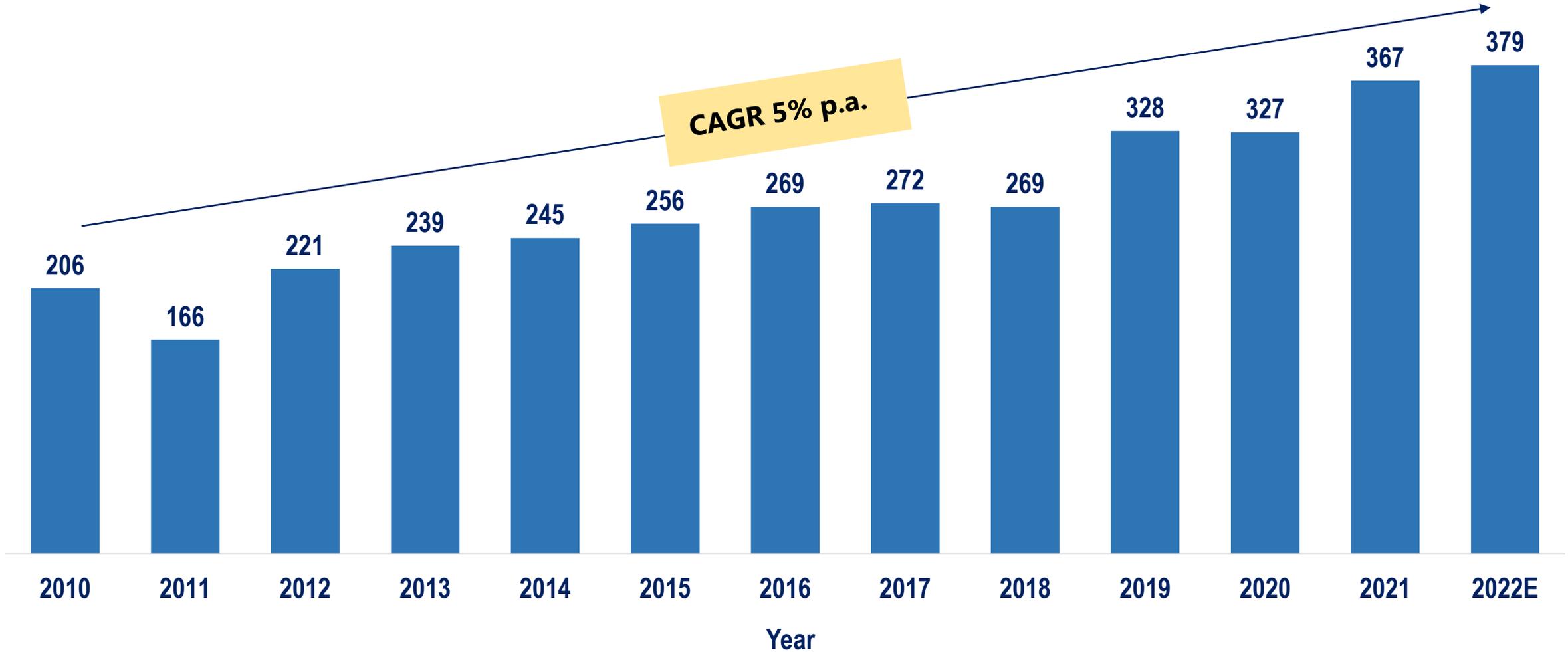
Top 10 cement groups in India

Rank	Company	Cement Capacity MTPA	Share %
1	Ultratech Cement Limited	114.40	21%
2	Lafarge Holcim India (ACC + Ambuja)	62.70	12%
3	Shree Cement Limited	43.40	8%
4	Dalmia Bharat Limited	30.75	6%
5	Nuvoco Vista Corp. Limited	22.32	4%
6	The Ramco Cements Limited	19.40	4%
7	India Cements Limited	15.55	3%
8	Birla Corporation Limited	15.38	3%
9	Chettinad Cement Limited	14.92	3%
10	JSW Cement Limited	13.93	3%
Total		352.75	67%

Source: Survey of Cement Industry & Directory

Country's cement demand trend

In Million T



'E' denotes Estimates for the year

Uniqueness of Ramco Cements



Longevity of the company; established in 1961 with 2 LTPA

Money raised as equity raised was ₹ 3.72 Crores only

Capital increased only through bonus issues

First to achieve 100% blended cement in 1999

All expansions managed through internal accruals / debt

Consistent highest EBITDA /Ton in the Industry

Trend setter in Cement technology

Real time data visualization thro robust IT infrastructure

Sophisticated Research & Development Centre

159th Rank in NSE based on Market Cap as at 31-3-2021

Largest WM capacity owned by a cement co. in the world

Only company to focus on right product for right application

Installed Capacity 2021

Clinker

11.40 MTPA

Integrated Unit

12.20 MTPA

Grinding Unit

7.20 MTPA

Dry Mortar

96,000 TPA

Ready Mix Concrete

56 Cu.Metre / Hour

Thermal Power

175 MW

Waste Heat Recovery

27 MW

Wind power (*)

166 MW

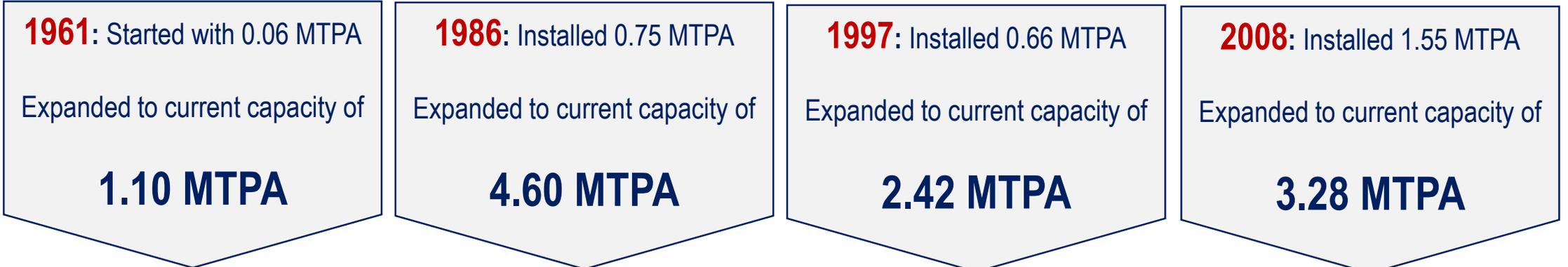
(*) Include Subsidiary

State / Product	UOM	TN	AP	KAR	WB	ORI	Total
Clinker – Integrated Unit	MTPA	6.80	4.60	-	-	-	11.40
Cement – Integrated Unit	MTPA	8.60	3.60	-	-	-	12.20
Cement – Grinding Unit	MTPA	2.10	2.00	-	2.20	0.90	7.20
Dry Mortar	Tons	96,000	-	-	-	-	96,000
Ready Mix Concrete	Cu. Metre / Hr	56	-	-	-	-	56
Thermal Power Plant	MW	133	42	-	-	-	175
Waste Heat Recovery System	MW	-	27	-	-	-	27
Wind Power	MW	160	-	6	-	-	166

Integrated Cement Capacity Journey



Clinker Capacity



Ramasamy Raja Nagar, TN

Jayanthipuram, AP

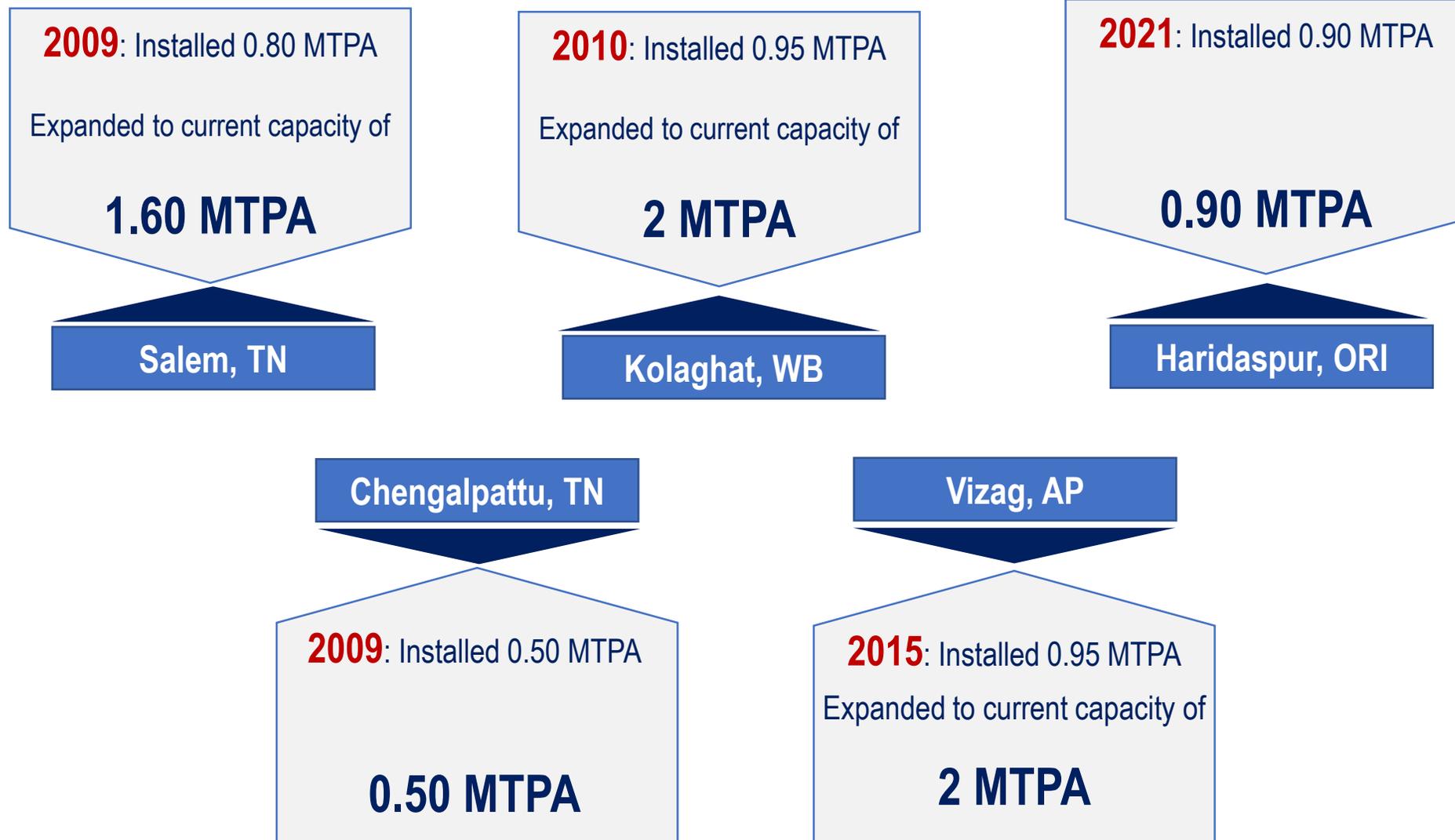
Alathiyur, TN

Ariyalur, TN

Cement Capacity



Grinding Cement Capacity Journey



Salient features of Plants

01

State of the
art
Technology

02

Strategically
located in
proximity to
markets

03

Well
connected to
ports and
NH / State
highways

04

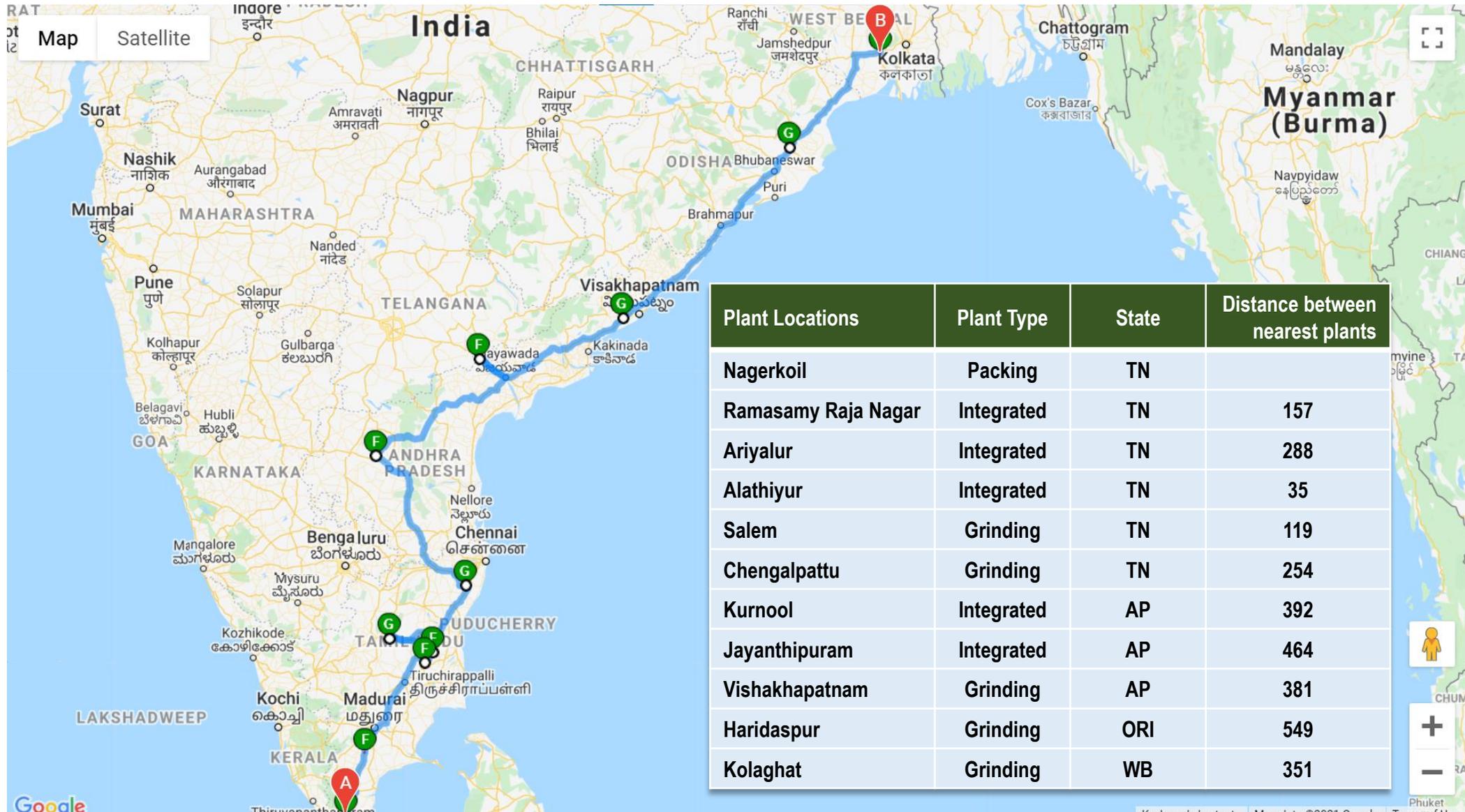
Captive
Power Plants
(TPP,
WHRS &
Windmill)

05

Railway
Siding with
automated
material
handling
system

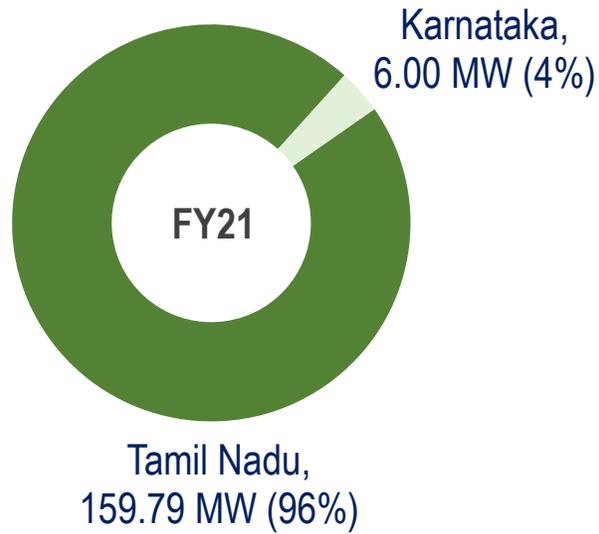


Plants located across east coast

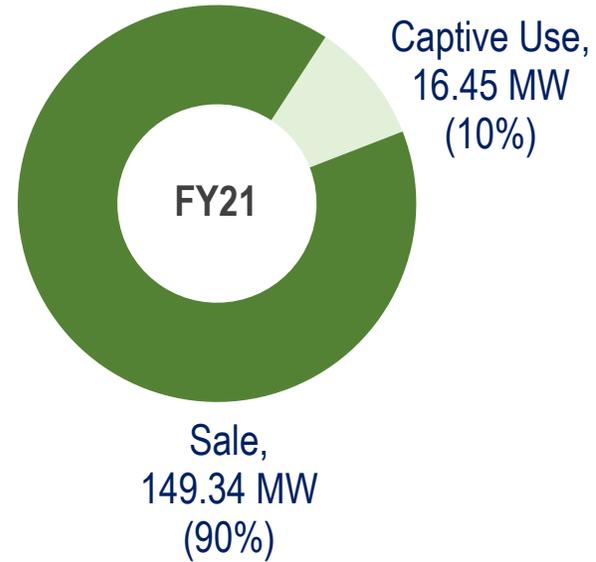


Wind power

Capacity Distribution



Wind power usage pattern



01

Only cement company in the World to own this size of wind power assets

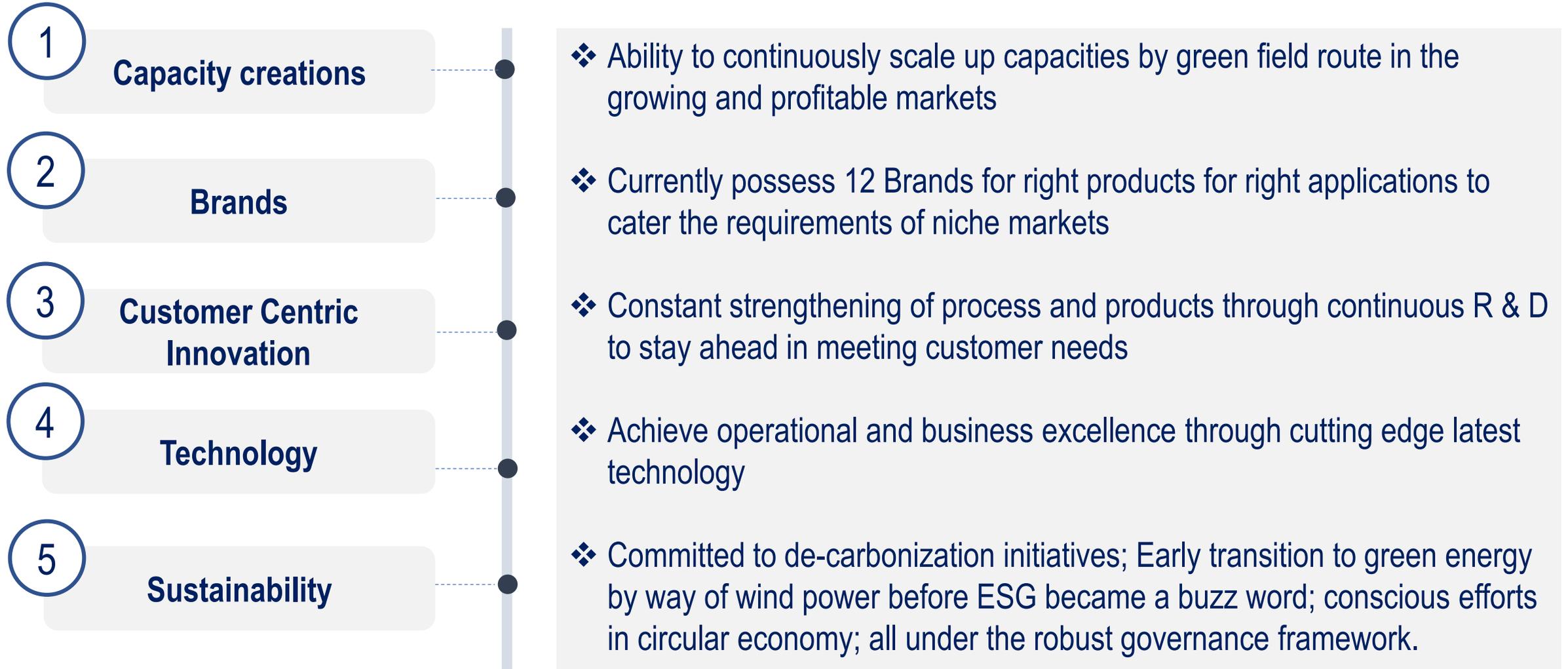
02

Average PLF 20 to 25% depending on wind availability

03

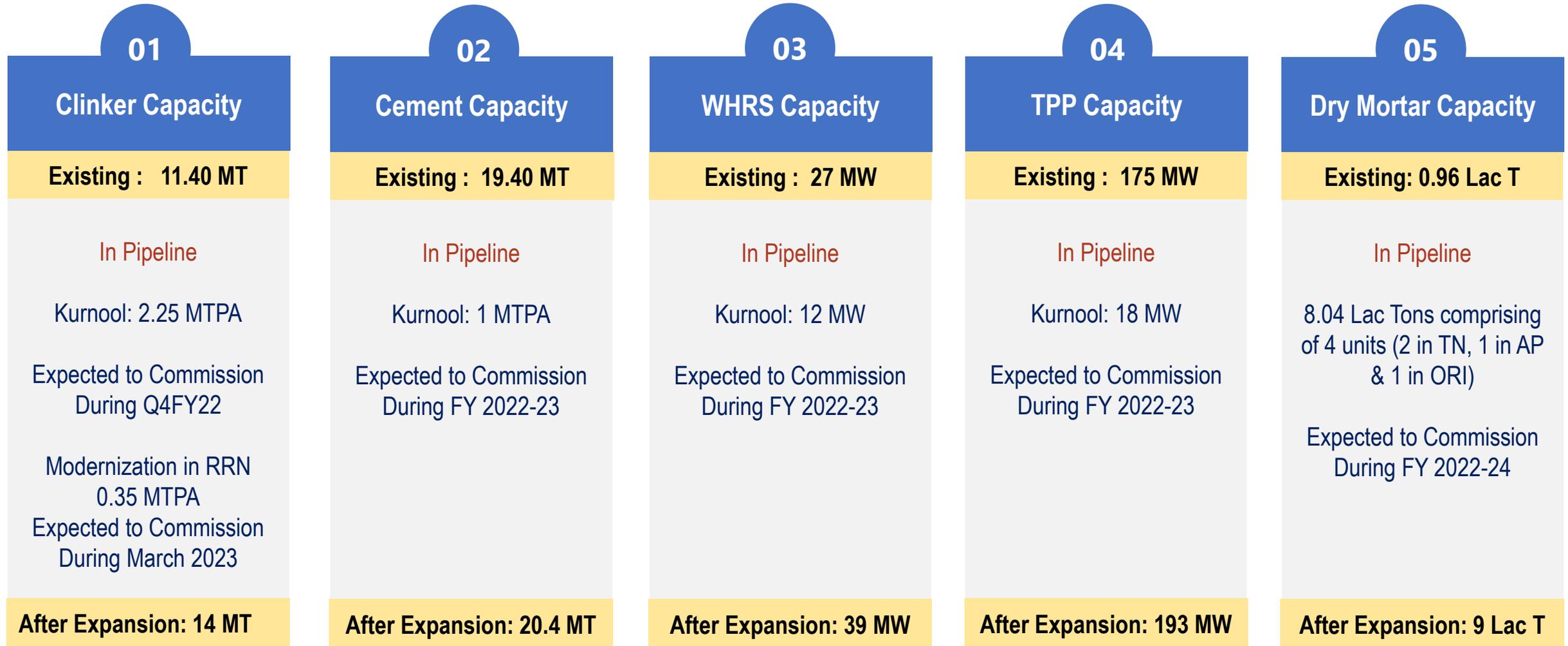
Early mover to invest in green energy assets from 1993 to 2008





Five forte that made it possible to strengthen our position in the market

Capacities in pipeline



Adding capacities, multiplying opportunities



Enhancing portfolio mix with R & D competencies

Right product for right application



Cements



Ramco Supercrete

High strength cement with low heat of hydration for crack-free concrete



Ramco Supergrade

For producing durable concrete with less heat of hydration and lesser time leaching



OPC 43 Infra

For high strength & high slump concrete generally used for government works for structures like nuclear power projects



OPC 53 Infra

For all infrastructure projects like bridges, flyovers, tunnels, which requires concrete with high slump retention



OPC 43 Grade

For high strength concrete, suitable for cement sheet manufacturing & Govt, works



OPC 53 Grade

For high strength concrete



Ramco Super Steel

For high grade concrete in environment with extreme exposure conditions



Ramco Super Fast

A rapid hardening Portland cement for manufacturing precast items like hollow blocks, solid blocks, paving blocks and other precast items



Ramco Supercoast

Suitable for concreting in areas with high concentration of sulphates



Ramco Samudra

For durable concrete with low heat of hydration



Ramco Superfine EFC

For making concrete with high durability and enhanced impermeability



Karthik Super Plus

Blended cement for canal works & concreting where low heat hydration required

Right product for right application

Dry Mix products



Ramco Super Plaster

Engineered for super smooth, provides greater workability and high productivity, gives lesser rebound loss and offers superior finish for painting



Ramco Super Fine

An all-weather white-cement based water repellant wall putty with crack resistance and excellent bonding abilities with plaster



Ramco Tile Fix

For fixing all types of tiles, - granite, marble, natural stone, ceramic etc. as well as underwater applications



Ramco Self curing Plaster

For both internal & external plastering applications marked by water repellant feature



Ramco Block Fix

A polymer fortified block adhesive, for fixing of autoclave aerated concrete blocks, fly ash blocks, & concrete blocks marked by self curing abilities



Ramco Tile Grout

A high performance cement polymer grout. Ideal for application on both internal & exterior wall tiles & floor tiles, marked by abrasion resistance

Ready Mix Concrete

- ✓ For producing high performance concrete based on various requirements of customers
- ✓ The concrete is produced under controlled conditions, using sophisticated equipments, by ensuring quality



- ✓ Strict control over testing of materials, process parameters and continuous monitoring of quality
- ✓ Suitable for large volume concrete requirements because of its speed and workability

Customer Centric Innovation

Ramco Research and Development Centre (RRDC)

- ❖ Strong R & D team of scientists with sophisticated equipments
- ❖ Extensive research on usage of alternate fuels
- ❖ Research on reduction in fuel consumption through process optimization
- ❖ Research on modifying cement chemistry including mineralogy
- ❖ Research on various cement additives to enhance properties of cement and enhancing the concrete properties
- ❖ Continuous research on optimizing raw mix / fuel mix



Masons, Architect, Contractors & Engineers (MACE)

- ❖ An unique attempt to provide value added services to customer by providing onsite technical assistance through specialized mobile vans equipped with testing equipment to test the quality of cement, sand and water
- ❖ Imparting knowledge about the need for right products for right applications to all fours of construction eco-system
- ❖ Creating awareness about the need to follow best construction practices at construction sites
- ❖ Influencer engagement initiatives through Ramco Mason's club, Ramco Engineers' Club, and Ramco Family Circle



Strong focus on customer needs by building competitive edge with innovation and application science

01 Making sustained investments in technology

- ✓ Consistent investment in cutting-edge technology to drive manufacturing and business excellence
- ✓ Pioneers in the Indian Cement Industry to introduce a Centralized Control Center at Corporate Office

02 Technology empowering innovation

- ✓ Technology prowess is the engine running innovation for smarter construction solutions
- ✓ Holistic enhancement of entire value chain from sourcing raw materials to restructuring production and distribution chain

03 Information technology, is the way forward

- ✓ Hiring right people at the right positions & creating a strong team with ample technical know-how
- ✓ Focus on strengthening and upgrading IT infrastructure over the years enabled the first mover advantage to achieve higher operational efficiencies.

04 Overcoming the pandemic situation with technology

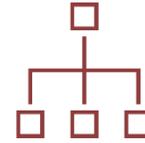
- ✓ Robust IT Infrastructure enabled to tide over the pandemic and disruptions caused by it
- ✓ Integrated IT system ensures operational and business excellence empowering people's real-time analytic capabilities

Reaping benefits for being pioneer in digital transformation

Agile Information Technology infrastructure



In-house competence for development of dynamic dashboards and Analytical Reports for data based decision making



Ramco ERP is fully integrated with end-to-end Business Processes



Advanced Information technology systems for data visualization, digitization



Centralized Setup connected by MPLS (Multiprotocol Label Switching) lines



Real time data analytics with multiple end user devices like PCs, Ipad, Tablets, Mobiles etc.

First movers



<p>1976 First in India to adopt the dry process Kiln technology for production of Cement Clinker of capacity 1200 TPD</p>	<p>2003 First in India to introduce the state of the art cross bar coolers for clinker cooling.</p>
<p>1980 First cement plant to install an Electrostatic Separator (ESP) for kiln gas venting to reduce particulate emissions.</p>	<p>2010 Adoption of Innovative mining techniques by Xcentric Ripper replacing traditional mining</p>
<p>1985 First cement plant in India to introduce the X-Ray Fluorescence (XRF) for identification of chemical composition of raw materials, in process material and Finished goods</p>	<p>2014 First in India to introduce the color based optical sorter for removal of intrusives from Limestone</p>
<p>1992 First cement plant in India to install a permanent roll Magnetic separators to isolate the intrusive from Limestone</p>	<p>2014 The only limestone mine in TN to have limestone beneficiation plant to achieve ZERO Waste Mining</p>
<p>1993 Started setting up Wind Farm to harness the clean energy. With continuous expansion, the present capacity stood at 165.785 MW</p>	<p>2015 Adoption of High momentum, Low Nox burner for Kiln firing</p>
<p>1996 First to introduce the environment friendly Surface Miner for mining application that eliminates the need for drilling, blasting, and primary crushing</p>	<p>2020 Generation of Electrical energy by utilizing the available waste heat in Kilns (WHRPP)</p>
<p>1997 Pioneer in Establishing the Blended cements in south India and First in India to install Vertical Roller mill replacing Ball mills for Cement grinding application.</p>	<p>2020 Restoration of mines pit for Conservation of Biodiversity</p>

ESG

Environment

Resource Efficiency

- Ensuring net zero emissions
- Optimal Water Management
- Ensuring Circular Economy
- Enriching bio-diversity
- Optimal use of resources

Social

People

- Occupational Health & Safety
- Employee engagement, well-being & professional development
- Diversity & inclusiveness

Community

- Education & Sports
- Water & Sanitation
- Health & Special needs
- Agriculture and livelihood
- CoVID 19 relief measures

Governance

Responsible leadership and business

- Robust Governance framework
- Strong Policy Framework
- Board Diversity and independence

Committed to Sustainable Development

01 Towards net zero carbon emissions

- ✓ Installation of WHRS to generate power
- ✓ Use of wind power for cement manufacturing
- ✓ Proactive measures for usage of alternate fuel
- ✓ Innovations in bringing new variants in blended cement as an alternative to ordinary portland cement

02 Water Management

- ✓ Initiatives such as rainwater harvesting, ground water recharging, water treatment & recycling
- ✓ Installation of Sewage Treatment Plant (STP) and Effluent Treatment Plant (ETP) at all plants
- ✓ Effective ways to use treated waters

03 Circular Economy

- ✓ Measures to reduce waste generation and efficient use of wastes in manufacturing
- ✓ Effective use of waste generated by other industries viz. fly ash, slag in cement manufacturing
- ✓ Strive to manage and dispose hazardous and non-hazardous wastes through authorized vendors

04 Sustainable Supply Chain

- ✓ Integration of social, ethical and environmental performance factors into the process of selecting suppliers, to build strong, long-term relationships with suppliers.
- ✓ Aims to lower the ecological footprint of its tasks, such as CO2 emissions, noise pollution, and accidents to maintain a balance between financial growth, environment care, and the health of society.

Proactive drive for a greener tomorrow

Sustainability - Social



Ensuring a Safe Workplace

Monthly campaigns on Safety Norms related to hazard identification and risk assessment. All employees must undergo Safety Induction Program

Employee Engagement and Wellness

Holistic approach towards their health and well-being; provide health care benefits; Conduct wellness programs like Yoga, personality development

Diversity & inclusion

Diverse employee base facilitates bringing diverse perspectives, promotes innovation & enhance productivity; Women participation encourages

Learning & Development

Partnered with Ross School of Business under the University of Michigan, and Harvard Business School to provide leadership trainings

Ensuring Holistic Development of Communities

Channelized efforts towards helping the communities to combat the pandemic by undertaking CoVID 19 relief measures

Education & up-skilling

Carry out educational, initiatives of upgradation of skill development for youth through SPV trusts

Water & Sanitation

Constructed 70 smart toilets during FY20 / FY21; Desilted water of various lakes and installed RO units to supply fresh drinking water to 15000+ people

Health & Special needs

Occupational Health Centers at cement plants in addition to organizing primary and secondary healthcare campaigns in various villages

Sports

Support school sports event, team sports, promote women athlete at both national and state levels.

Agriculture & livelihood

Provide training to farmers to ensure improved cattle health; Promote effective irrigation techniques;

Environment & bio-diversity

Waste management by conducting programs such as 'Garbology' 'kNOw Plastics', which direct towards reduce, reuse, recycle & disposal of waste

CoVID 19 / Disaster relief measures

Direct support to communities through relief measures; Partnering with local administration in carrying various relief operations; Vaccination camps

Governance Framework

- Robust governance framework that goes beyond regulatory compliance for maximizing shareholder value sustainably
- Enabled framework in conducting business with highest standards of compliance, honesty, integrity, and responsible business practices
- Board's independence to ensure transparency and protection of interest of all stakeholders

Ethical conduct

- Highest standards of business ethics across all activities, while ensuring protection of rights of all stakeholders
- Formulated a host of policies to maintain ethical and lawful behavior and uphold the integrity of the organization
- Code of conduct for Directors and Senior Management, Insider trading, Whistle Blower Policy, Risk Management Policy etc.

Board Independence and diversity

- 7 Board Members, of whom 6 are Independent directors, which inherently validates the transparency and fairness of the Board
- Diverse members from various fields such as manufacturing, business management, legal, banking, technology etc.
- The Board meets every quarter to review the quarterly performance and whenever needed



- Aim to consciously reduce the environmental impact and ecological footprint by incorporating elements of sustainability across the product life cycle from design to end of life
- Commitment to transition to Low Carbon Growth by investing in innovative technological solutions
- Aim to minimize the water footprint substantially by investing in adequate infrastructure and increasing recycling / reuse solutions
- Vision to preserve bio-diversity and deliver net positive impact



ESG Goals by FY25

- To ensure 'Zero Waste to Landfill' across operations
- Commitment to promote a sustainable, safe and inclusive work place that nurtures employees
- Commitment towards prioritizing zero injuries across operations and ensure overall health & wellbeing of all stakeholders
- Focus on creating shared value for our communities and continued inclusive & interactive dialogue with stakeholders



Board



P.R. Venketrama Raja
Chairman & Managing Director

3rd generation
Promoter family



R.S. Agarwal
Independent Director

Retired Executive Director,
IDBI Bank



M.B.N. Rao
Independent Director

Retired Chairman & MD,
Canara Bank



M.M. Venkatachalam
Independent Director

Promoter Director of Murugappa
Group of Companies



Justice Chitra Venkataraman (Retd.)
Independent Director

Retired Judge of
Madras High Court



M.F. Farooqui, IAS (Retd.)
Independent Director

Ex Secretary in key ministries,
Government of India



Prof. M.S. Krishnan
Independent Director

Professor in Technology & Operations, Ross
School of Business, University of Michigan

Established Strong governance framework, on the back of an effective Board of Directors, led by our core values

Empowered Committees



Audit Committee

The Committee is entrusted with the Business, Economic and Environmental responsibilities of the organization. It supervises financial reporting, and disclosures ensuring timeliness and compliance with regulator requirements

Nomination & Remuneration Committee

The committee recommends suitable persons for the post of Directors and their remuneration. The Board considers their recommendation and seek approval of shareholders for the appointment. This committee lays down performance evaluation criteria for independent directors based on expertise and value expertise

Stakeholders Relationship Committee

This Committee oversees the timely and appropriate resolution of investor compliant. Members of this committee also formulate policies to service this stakeholder group

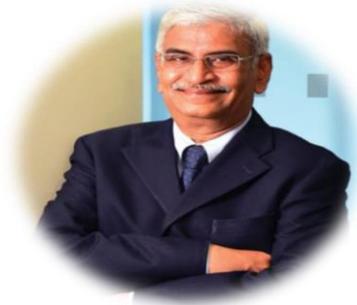
Risk Management Committee

The Committee is responsible for reviewing and evaluating all business risks identified by the Company's management, including those pertaining to the environment. Members of this committee oversee the formulation of Ramco Cements' Risk Management Policy and also provide strategic direction to minimize potential risks. They also oversee the establishment, implementation and monitoring of the organization's risk management system

CSR Committee

The Committee is entrusted with the social responsibility obligations of the Company. This committee is responsible for developing & modifying the organization's CSR Policy, as well as for identifying the CSR programs and related expenditure for Ramco Cements to undertake. The monitoring of CSR projects implemented including financials is in the purview of this committee as is keeping the Board updated of the organization's CSR activities

Experienced Leadership Team



A.V. Dharmakrishnan
Chief Executive Officer

He joined the Company when it was having a single manufacturing unit and grew with it to become the CEO. He is now leading and successfully steering the company in all its spheres of its operations. A great believer of the digital management system, he is responsible for introducing data driven decision making and management control system across all layers of the organization.



M. Srinivasan
ED - Operations

He heads the manufacturing team and is responsible for production, quality control and research & development activities. His vast knowledge in the chemistry of cement has helped the organization in the development of various types of cement for specialized applications. He is also heading the project team executing the capacity augmentation program



Balaji.K. Moorthy
ED - Marketing

He heads the marketing functions of the Company. With the rapid expansion in the manufacturing capacity of the Company, he is responsible for creating various new markets in Karnataka, Odisha, West Bengal etc. He is credited with popularizing the various types of cements of the Company, which are vital for its progress



S. Vaithyanathan
Chief Financial Officer

He heads the Finance and Accounts teams of the Company. He is responsible for project financial planning, tax planning, internal controls, commercial and logistics operations of the Company. He assists the Company on all strategic and tactical matters relating to budget management, cost-benefit analysis and forecasting. He is responsible for managing risks, financial reporting and data analytics



K. Selvanayagam
Company Secretary

He heads the Secretarial and related compliance functions of the Company. He handles meetings, and all in-house share related matters including connectivity with NSDL and CDSL. He has handled bonus issues, buy-back of shares etc. and is responsible for introducing paperless board meetings. Contributing to in-house management training programs and the large CSR functions are his key areas

Leadership that instills trust, with 25+ years of experience in Ramco Cements

Marketing Strategy



Training on product knowledge for all stakeholders in the supply chain

Customer segmentation

Share of Premium products

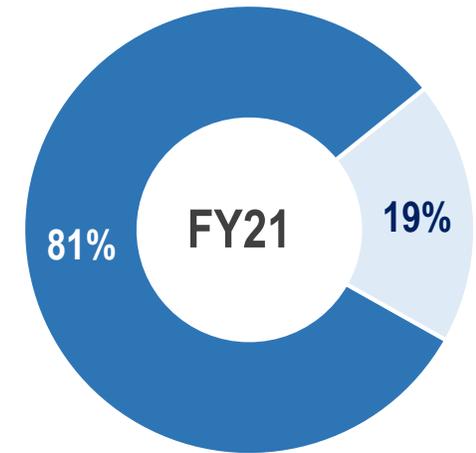
Tech service support to customers



Right product for right application

Brand promotional activity

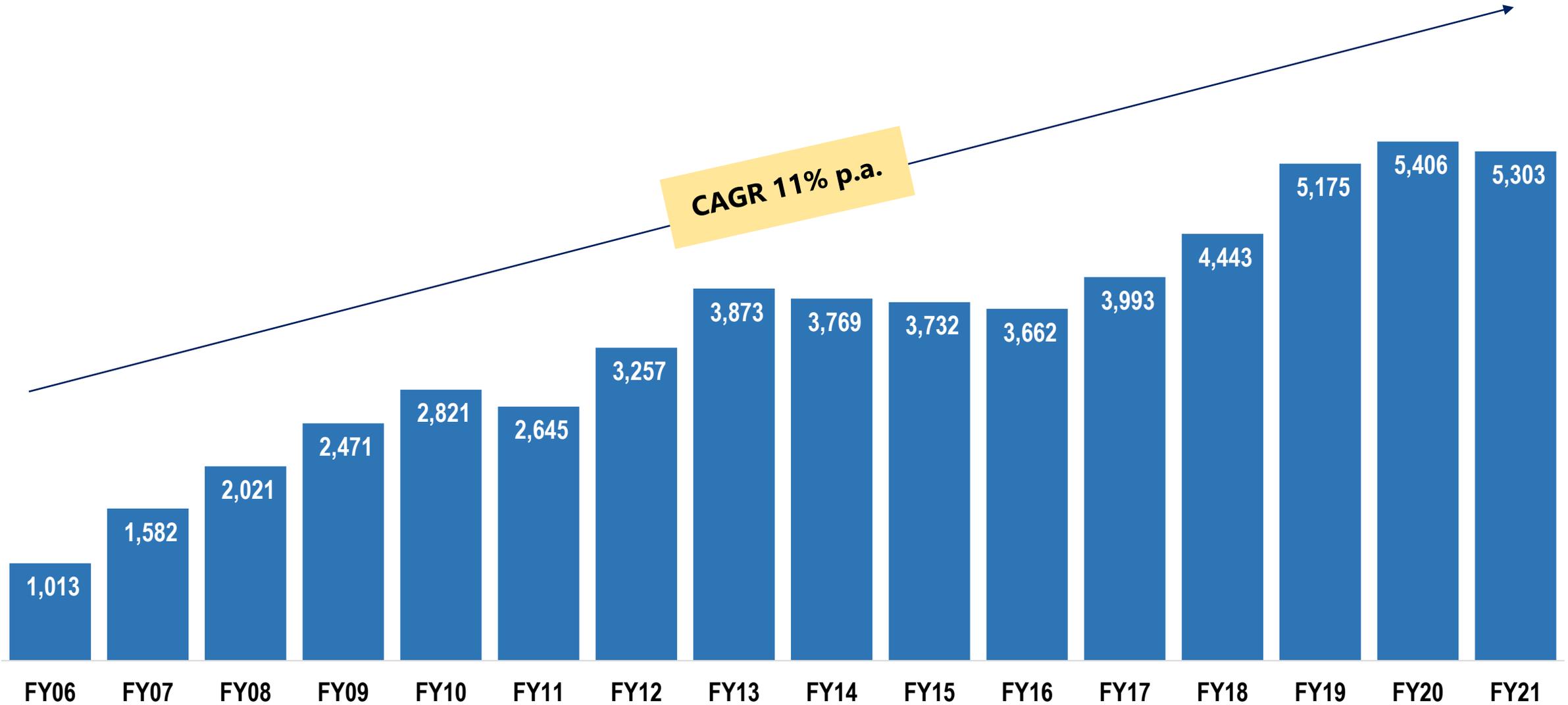
Strengthening the product portfolio



- Premium Products
- Flagship Products

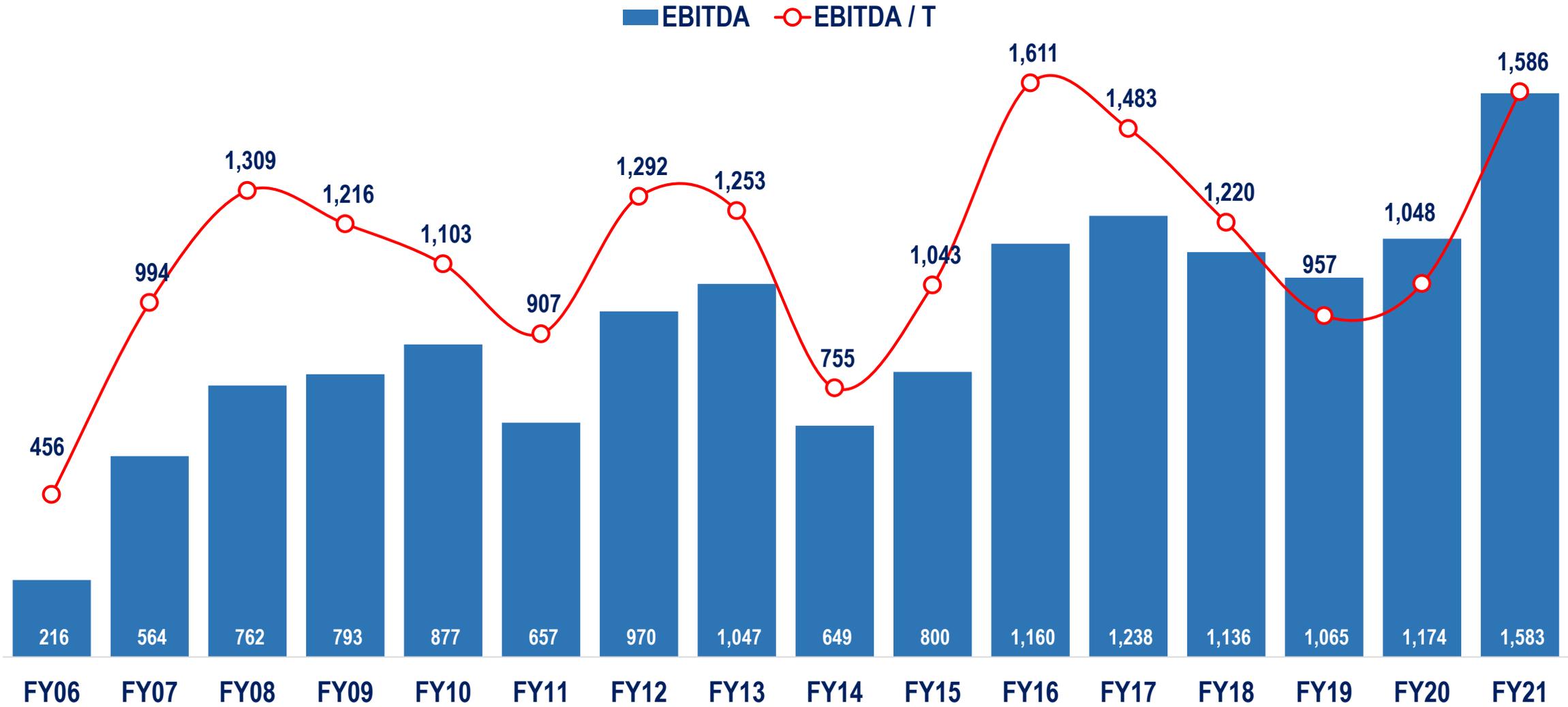
Net Revenue

₹ in Crores



CAGR 11% p.a.

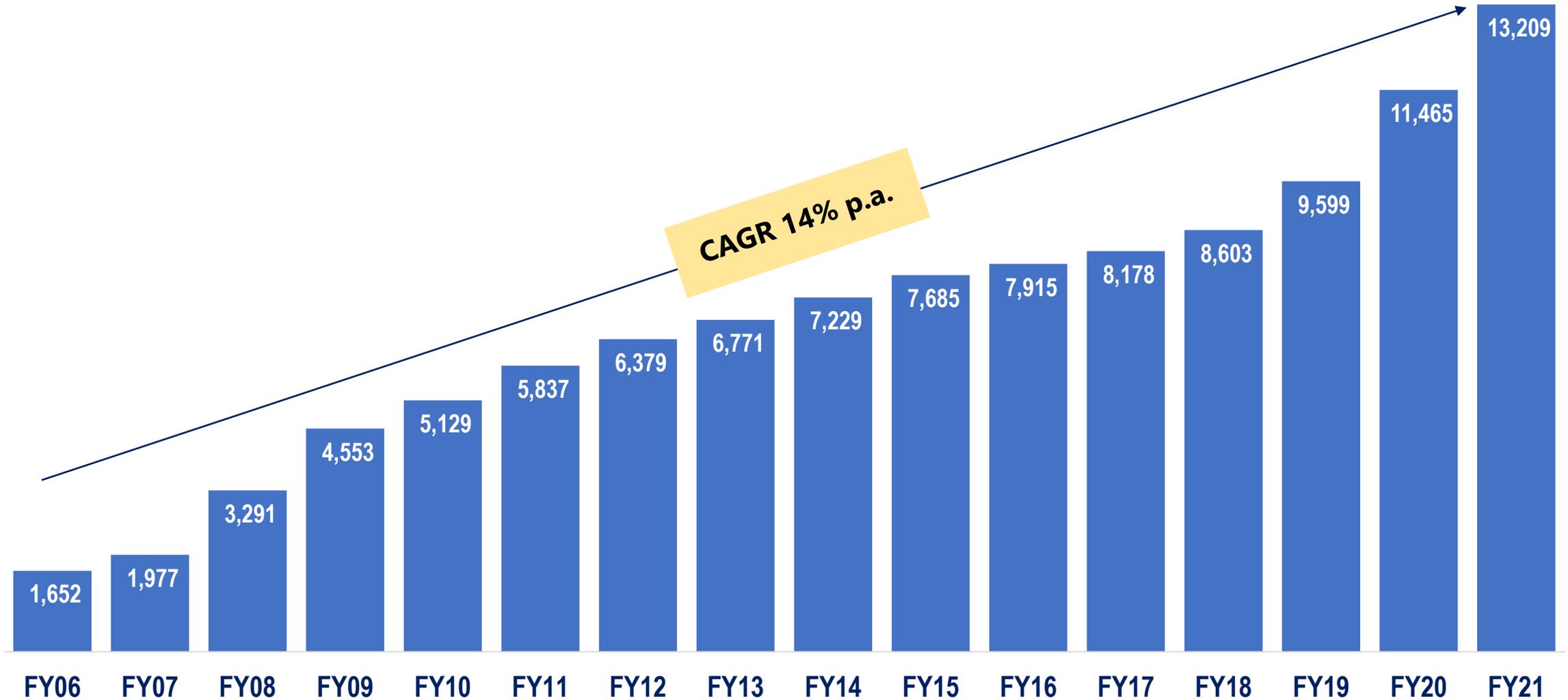
Profitability



EBITDA is represented as ₹ in Crores; EBITDA / T in ₹

Gross Fixed Assets

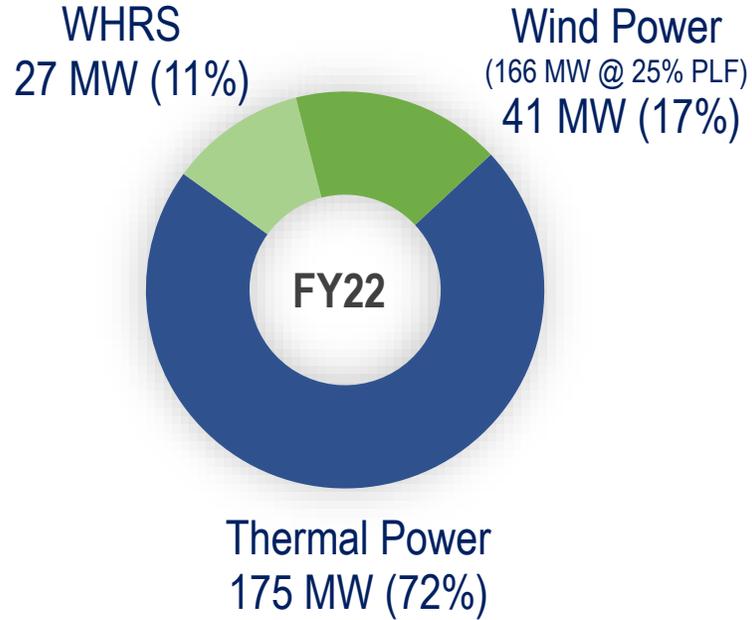
₹ in Crores



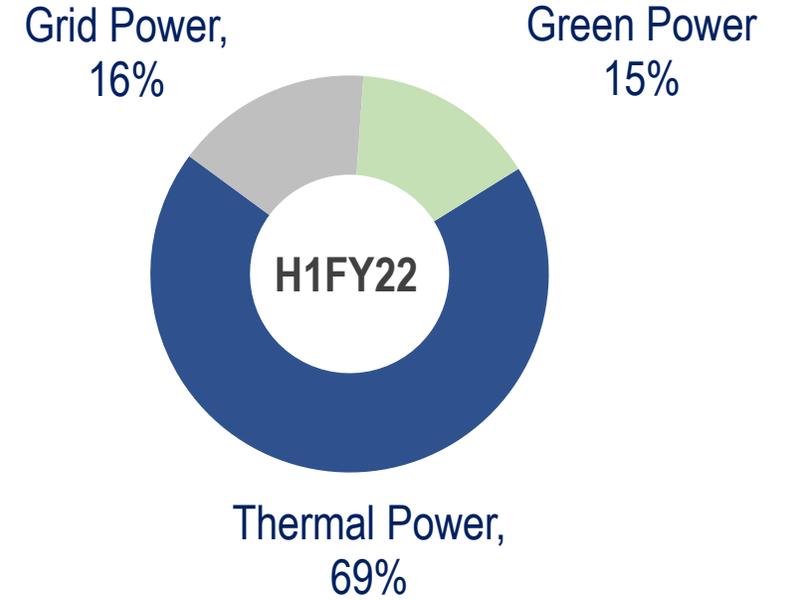
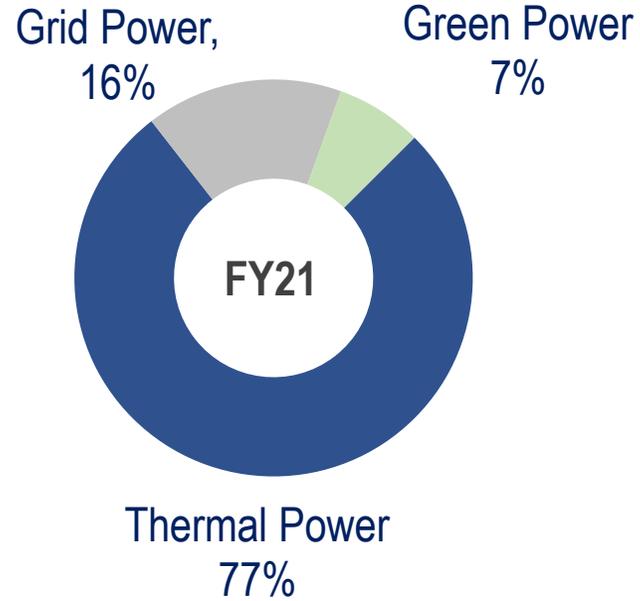
Power generation



Power Generation Capacity



Power Usage Trend



Continued focus on Green Power; WHRS benefits will be more visible during FY23

Trucks



01

- Primary movement by bigger capacity
- Secondary movement by smaller trucks
- 92% of total cement movement is through trucks

Rail



02

- Long distance movement of Clinker and cement by rail
- Automated material handling system at factories help to optimize overall logistics costs
- 8% of total cement movement is through rail

Coastal Ships



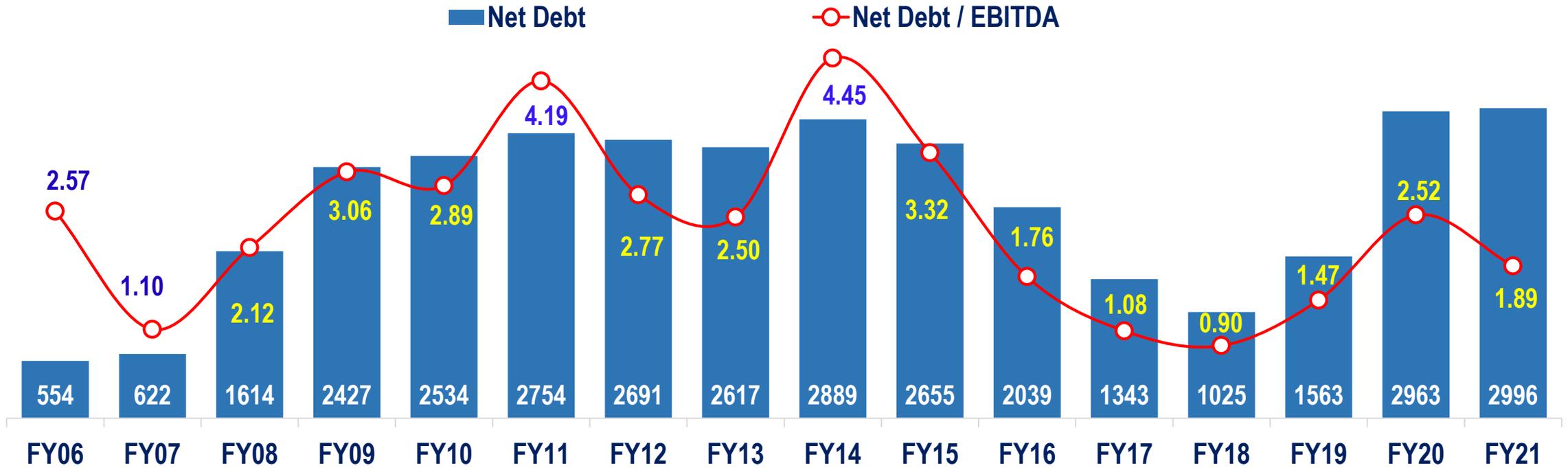
03

- Movement of Cement through Ship by containers
- Movement of Clinker to eastern markets

Multi-modal Logistics enables to manage logistics cost better

Leveraging on Debt

₹ in Crores

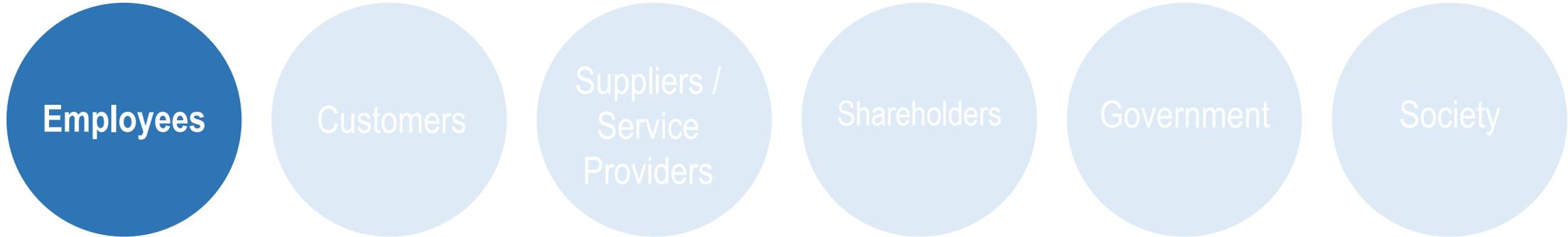


Debt – Equity Ratio (In Multiples)															
1.54	1.02	1.72	1.98	1.67	1.61	1.32	1.12	1.18	1.03	0.69	0.38	0.28	0.36	0.61	0.55
Total Cement Capacity in MTPA															
5.99	5.99	7.99	9.99	12.44	12.44	12.44	15.54	15.54	16.49	16.49	16.49	16.69	16.69	18.79	19.40

AA+ Rating for Long Term Debt / NCD from ICRA

Capacities built without dilution of equity

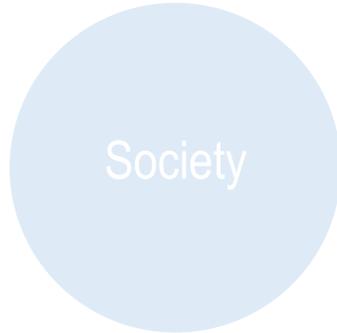
A1+ Rating for Short Term Debt from CRISIL / ICRA



Nurturing Human Capital

- ✓ Employee Stock Options
- ✓ Social Security Schemes viz. PF, ESI, Gratuity, NPS, SA
- ✓ Clear career path
- ✓ Performance appraisal system
- ✓ Leadership training by World's best B-Schools viz., HBS, ROSS
- ✓ Housing colony for employees in factories
- ✓ CBSE schools in factory premises
- ✓ Insurance for Life / Personal Accident / Mediclaim
- ✓ Subsidized loan for asset buildings
- ✓ Interest free loans for vehicle / marriage / education
- ✓ Subsidized canteen facilities
- ✓ Quality circle, 5S
- ✓ Recreation club, sports facilities, Temples, Auditorium
- ✓ Park, Gym, ladies club, Library, Holiday Homes
- ✓ Employee Satisfaction Survey
- ✓ Long Service Awards

Commitment to Stakeholders



Age wise Employees Strength as on Mar-21

Age (In years)	Officers	Staff / Workmen	Total
<= 35	439	1134	1573
35 to 40	255	191	446
40 to 45	145	235	380
45 to 50	163	223	386
50 to 55	169	222	391
55 to 58	70	88	158
> 58	38	2	40
Total	1279	2095	3374

History of Long Service Awards

Category	Count
Officers	581
Staff / Workmen	986
Total	1567

Best Human Capital Practices ensures talent acquisition and retention

Young Minds

- ✓ ~ 60% of the total work force is less than 40 years of age

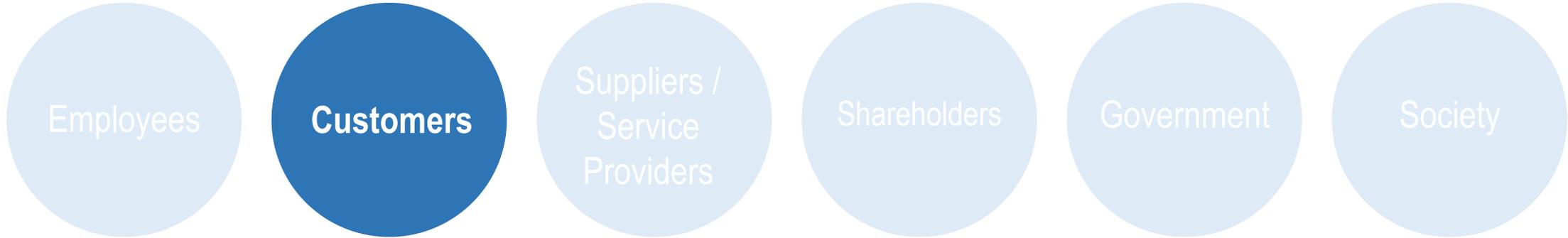
Experienced

- ✓ More than 65% of the total work force has been with us for more than 5 years

Employee Strength

- ✓ Employee strength is 3374; Average attrition level is around 3% in the last 15 years

Commitment to Stakeholders

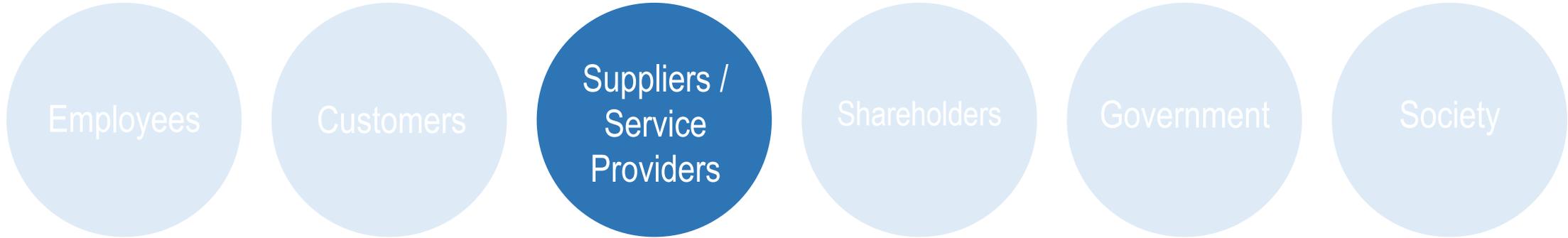


Strong Distribution Network

Ageing Bucket	Exclusive Dealers	Multi-Brand Dealers	Total Dealers	%
Up to 5 years	660	4676	5336	59%
5 to 10 years	401	1299	1700	19%
10 to 15 years	242	686	928	10%
15 to 20 years	146	328	474	5%
Above 20 years	260	389	649	7%
Total	1709	7378	9087	100%
20,000 + Sub-dealers				

- ✓ Right products for right application
- ✓ High Quality products with prompt services
- ✓ Transparent & ethical business policies
- ✓ Education programs for statutory compliances
- ✓ Customer education on best construction practices
- ✓ Exclusive Dealer Club (Ramco Family Circle)
- ✓ Medical / PA Insurance Benefits for dealers & family
- ✓ Scholarship benefits for dealer's children education
- ✓ Holiday & Pilgrimage travel facilities
- ✓ Dealer performance awards
- ✓ Sub-dealer performance awards
- ✓ Foreign tours
- ✓ Factory / R & D center visits
- ✓ Mason club
- ✓ Truck assistance program
- ✓ Rental assistance for storage facilities

Commitment to Stakeholders

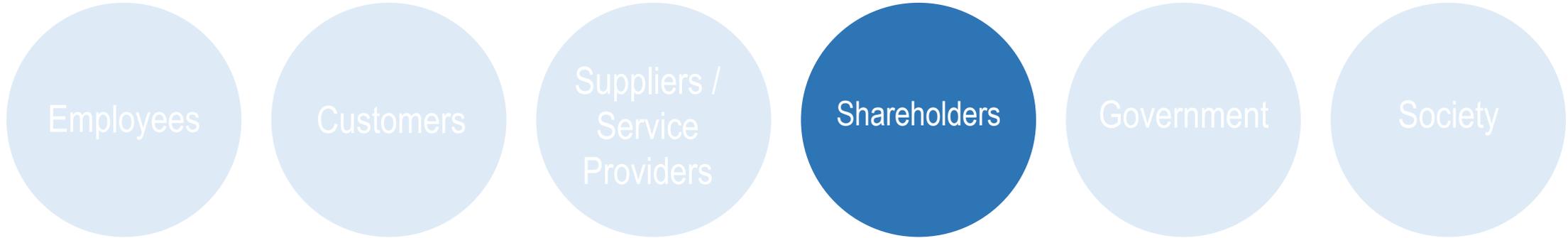


Supply chain eco-system

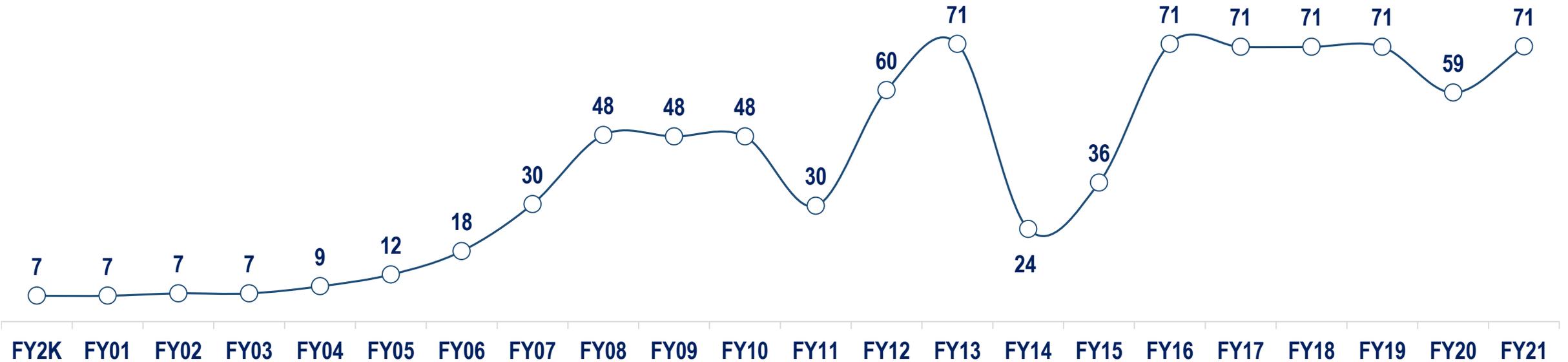
- ✓ Procurement of high quality products & services
- ✓ Transparent business policies
- ✓ Sustainable supply chain development
- ✓ Equal opportunities
- ✓ Prompt payment (Suppliers are not source of finance)
- ✓ Truck Assistance program for transporters
- ✓ 30,000 + suppliers / service providers
- ✓ Effective supplier selection & continuous assessment
- ✓ Treat our suppliers as business partners
- ✓ Highly rated by vendor through evaluation

Commitment to Stakeholders

₹ in Crores

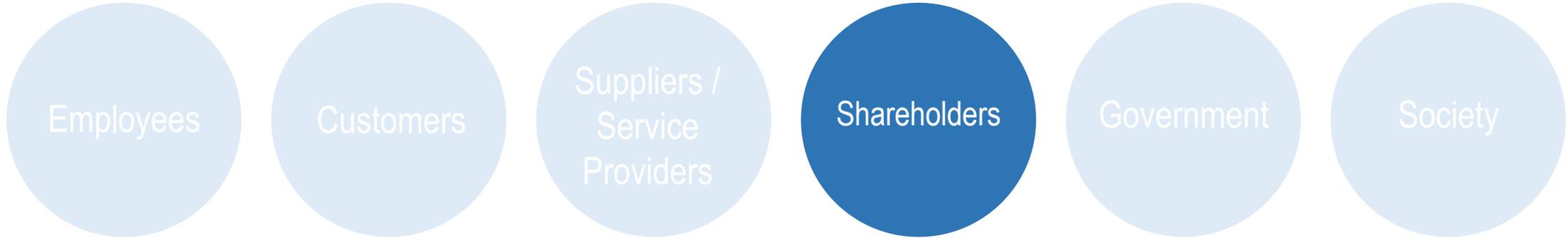


Consistent Dividend Payout in last two decades

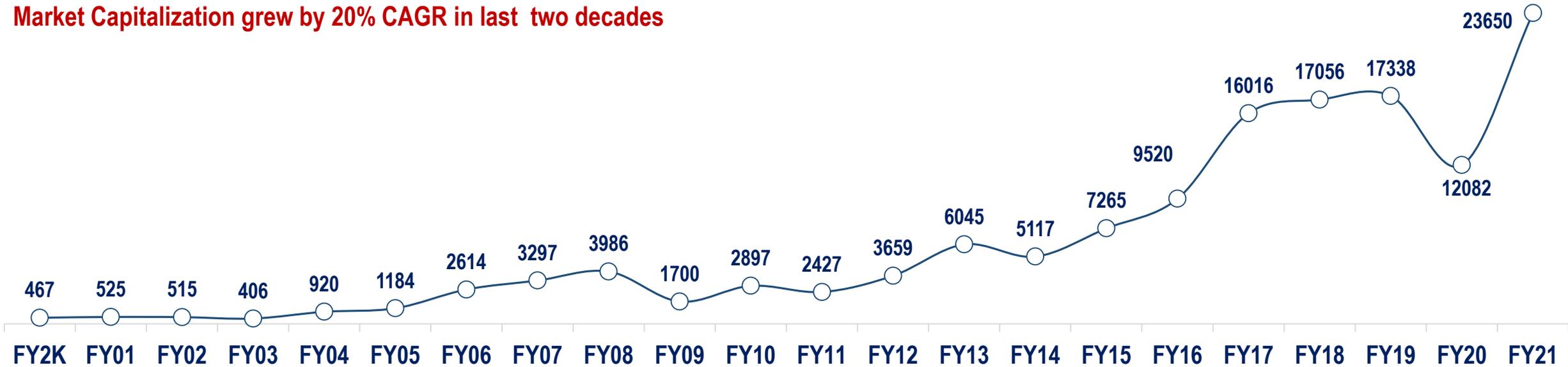


Commitment to Stakeholders

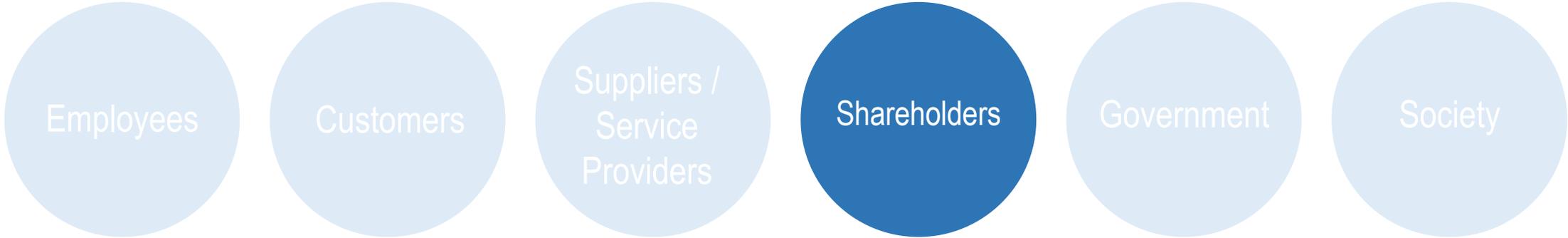
₹ in Crores



Market Capitalization grew by 20% CAGR in last two decades

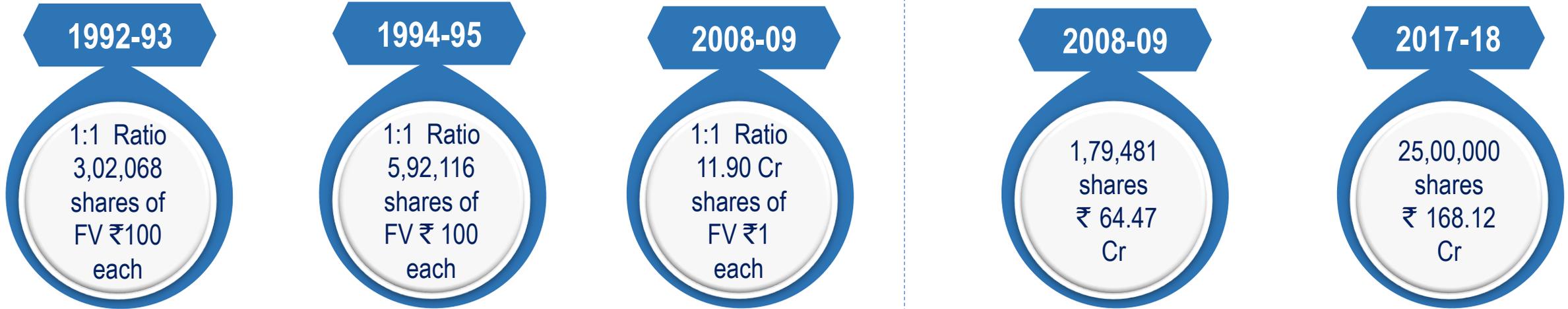


Commitment to Stakeholders

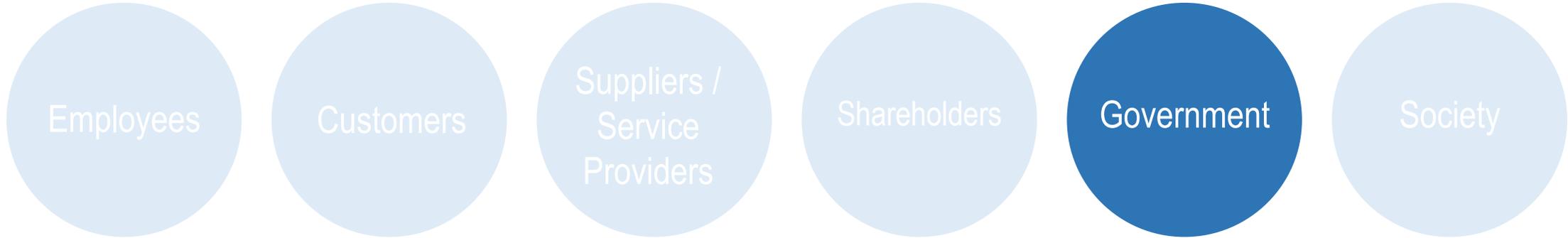


Bonus issues

Buy back of shares



Commitment to Stakeholders

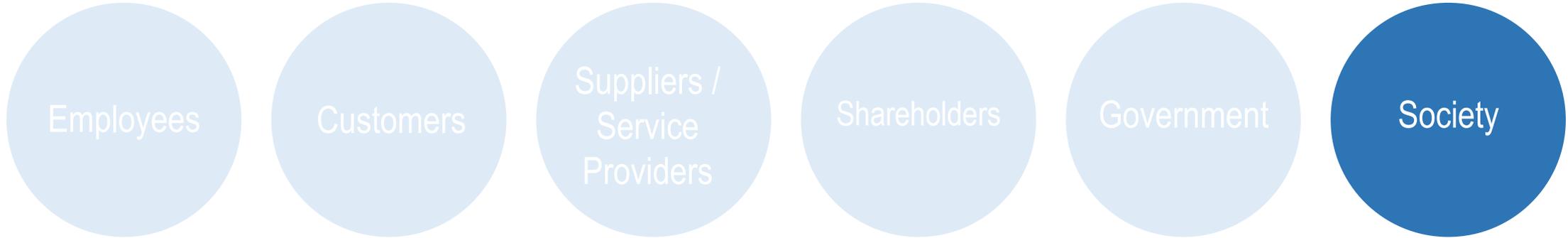


Contribution to Exchequer	₹ In Crores
2014 – 15	1,418
2015 – 16	1,550
2016 – 17	1,711
2017 – 18	1,837
2018 – 19	1,952
2019 – 20	1,967
2020 – 21	1,995

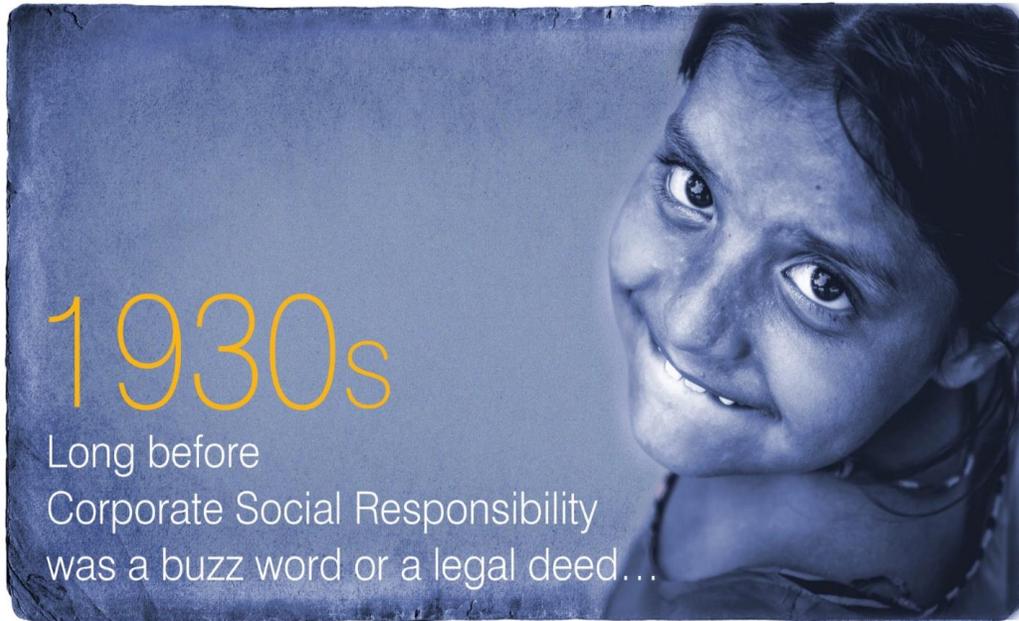
Responsible Corporate Citizen

- ✓ Compliance of laws
- ✓ Prompt payment of taxes
- ✓ Respect for rules and regulations
- ✓ Contribution to relief funds of Government
- ✓ Partnering with government during natural calamities / pandemic

Commitment to Stakeholders



Commitment to society through various CSR initiatives



Our founder became the first to create a blueprint for CSR



Green Belt development

Education & Skilling

Water & Swachh Bharat

Health & Special needs

**2,20,000 +
saplings planted**

As part of 'Nisrith' Mine
Restoration Project in
Pandalgudi

**5,500 +
Students**

**270 +
Teachers**
Across 7 Schools
benefitted

**70 +
Smart Toilets**
constructed

**15,000 +
People**
Benefitted from
installation of RO Plants

**17 +
Medical Camps**
constructed

**1,800 +
People**
Benefitted



Socially conscious by measuring performance on social and environment parameters

CSR - Green belt development

Restoration of Mines: Making of mined land into a eco-park in Pandalgudi, Tamil Nadu





PACR ITIs are ranked among the top 10 institutes in India - Ariyalur (3rd)
by Skill Strengthening for Industrial Value Enhancement Project of GoI



The Ramco Cements Limited Educational & Charitable Trust

- ✓ Running CBSE Schools at all our factories
- ✓ Vocational education and skill training for youths
- ✓ Provided amenities like academic material and uniforms to 2,000 government school students annually.



Ramco Vidyalaya, RR Nagar



Vidya Mandir, Alathiyur

De-silting water bodies

Before



After



De-silting water bodies

Before



After



Sustainable water management solutions: Reusing, Recycling and Replenishing water



70+ Smart Toilets constructed so far



CSR - Disaster Relief



Disaster Management & Rehabilitation initiatives in Tamil Nadu



Disaster Management & Rehabilitation initiatives in Kerala



Disaster Management & Rehabilitation initiatives in Orissa



CSR - Contribution to relief funds of Government



₹ 1 Crore contributed towards Tamil Nadu Flood Relief



₹ 2 Crores contributed towards Kerala Flood Relief Fund



₹ 2 Crores donated to Odisha CM's Relief Fund for Cyclone Fani

CSR - Covid19 Relief spend in FY21



State-wise Relief		CM Relief Fund	Livelihood	Medical Equipments	Total
Tamil Nadu	₹ in Crores	2.50	1.07	1.03	4.60
Andhra & Telangana		2.50	0.43	0.29	3.22
Kerala		-	-	0.79	0.79
Karnataka		-	0.04	0.01	0.05
Orissa		-	0.39	2.13	2.52
West Bengal		-	0.19	0.01	0.20
Total			5.00	2.12	4.26

Details of Relief measures	Quantity	₹ in Crores
Food grains (Rice, Wheat / Flour, Vegetables, Dal, etc.)	485 Tons	2.12
Cots, Bedsheet and Fans for Corona Quarantine centres	550 Nos	0.05
Sanitizers	40 KL	0.20
Face Mask	4.60 Lac Nos	0.84
Thermos meters / PPE Kit	12000 + Nos	1.32
Oxygen Concentrator, Monitors & Ultrasound Scanners	150 + Nos	1.40
Other Hospital Support Equipment's	4000+ Nos	0.45
Contribution to CM Relief Fund		5.00
Total		11.38

CSR - Financial assistance to martyrs' families



Rs. 40 lakhs distributed to 8 Jawans of Rs. 5 lakhs each to the Pulwama attack martyrs' families

Memberships



- Collaborations with industrial bodies enables to jointly influence policy decisions and,
- formulate plans for sustained growth and health of the industry,
- for addressing critical issues of the climate crisis, environment conservation and the development of fellow Indians.



Bureau of Energy Efficiency
Ministry of Power, Government of India



Cement Manufacturers Association



Confederation of Indian Industry



National Council for Cement and Building Materials



Federation of Indian Chamber of Commerce and Industry



Indian Wind Power Association



Indo-German Chamber of Commerce
Deutsch-Indische Handelskammer
Mumbai – Delhi – Kolkata – Chennai
Bengaluru – Pune - Dusseldorf



The Madras Chamber of Commerce

Market Analysts' view

Analyst firm	Analyst's comment on Q2FY22 results	Date	Recommendation
 B&K SECURITIES WE UNDERSTAND MONEY	Strong volume recovery; cost matrix resilient	25-10-2021	Buy
 Sharekhan by BNP PARIBAS	Positive surprise on volume; focus shift to pricing	25-10-2021	Buy
 kotak Institutional Equities	Strong quarter	25-10-2021	Sell
 YES SECURITIES INSTITUTIONAL EQUITIES	Spreading its wings beyond South	25-10-2021	Buy
 ANTIQUE STOCK BROKING LIMITED	Volume led beat dampened by increased leverage	26-10-2021	Hold
 Emkay Your success is our success	Risk-reward seems favourable	26-10-2021	Buy
 ICICI direct Research	Margin under pressure; demand outlook stays firm	27-10-2021	Buy
 Jefferies	Strong YoY volume growth	25-10-2021	Hold
 CLSA	Higher volumes drive beat	25-10-2021	Out perform
 ICICI Securities	Sustaining Industry leading profitability	26-10-2021	Buy
 ANAND RATHI	Cost savings to provide a fillip; delivering in sight	26-10-2021	Buy
 MOTILAL OSWAL	Optimistic on demand, but wary of near-term cost inflation	25-10-2021	Buy
 HDFC securities	Strong volume growth; margin to rebound	26-10-2021	Buy



Thank you



Disclaimer

This communication, except for the historical information, may contain statements which reflect the Management's current views and estimates and could be construed as forward looking statements. The future involves certain risks and uncertainties that could cause actual results to differ materially from the current views being expressed. Potential risks and uncertainties include such factors as general economic conditions, foreign exchange and commodity price fluctuations, competitive product and pricing pressures, regulatory changes, economic developments within India and other countries within which the Company conducts business and other factors such as litigation and labour negotiations. The Company assumes no responsibility to publicly amend, modify or revise any forward-looking statement, due to any subsequent development, information or events, or otherwise.

Stock Code: BSE: 500260 | NSE: RAMCOCEM

www.ramcocements.in

The Ramco Cements Limited

Corporate Office:

No.98A, Auras Corporate Center, 5th Floor

Dr.Radhakrishnan Salai, Mylapore,

Chennai 600 004

