

AEGIS LOGISTICS LIMITED

Corporate Presentation

October 2026



Safe Harbour



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Section 1:

Company overview

Our vision and mission



Vision

To support India's transition towards a more sustainable future



Mission

To store and distribute bulk liquids and gases in a safe, sustainable manner

Aegis at a glance: Seven decades in building India's leading logistics platform¹



Company overview



Integrated logistics leader

India's leading integrated oil, gas and chemical logistics company¹; incorporated in 1956



Present across entire value chain

Sourcing, storage, terminalling, handling and distribution



Multi-modal evacuation infrastructure

Connectivity through rail, cross country pipeline connectivity and road evacuation



Diversified end markets

Serves domestic, commercial, industrial and auto-gas customers



Marquee partners and customers

JVs with Royal Vopak and ITOCHU Petroleum; relationships with OMCs and private LPG importers



Leading private-sector LPG and liquids franchise

India's leading private sector LPG importer and handler, with liquid logistics expertise

Key highlights

Asset base

3,74,800MT

LPG static storage capacity²

c.2.5mnKL

Liquid storage capacity²

36,000MT

Ammonia capacity³

Operations, FY26

5.2MMT

LPG logistics volume

754KT

LPG distribution volume

79x

LPG throughput-to-static turns

Financials, FY26

INR1,599cr.

Normalized EBITDA⁴

INR1,107cr.

Profit after tax

INR25.59

Diluted Earnings per share

Note: Refer glossary for all acronyms

1. Source - CRISIL Research

2. Including upcoming capacity of 129kMT for LPG and 0.5mnKL of liquid capacity, as of June 30, 2026

3. Commissioned on August 10, 2026

4. Normalized EBITDA - before forex, hedging-related expenses

Operating across two complementary segments: Liquids and gas

	Business	Revenue model	Capacity ¹	EBITDA	Presence
Liquids	Third party liquid logistics	- Fee-based revenue - Handling and other service charges	 2.5mnKL Liquid storage capacity² (includes 0.5mnKL upcoming capacity)	 INR472cr. FY26 EBITDA⁴	 Terminals across 7 ports Kandla, Haldia, Pipavav, JNPT, Mumbai, Mangaluru & Kochi
Gas	- Sourcing - Third party gas logistics - Industrial distribution products - Auto gas retailing and packed LPG	- Pass through income for sourcing - Fee-based revenue for gas logistics - Retail margin for gas distribution - Handling and other service charges	 4,10,800MT Gas Static capacity (includes upcoming capacity for both LPG and ammonia, 129kMT for LPG and 36kMT for ammonia)	 INR1,127cr. FY26 EBITDA⁴	 Terminals across 6 ports³ Kandla, Haldia, Pipavav, JNPT, Mumbai & Mangaluru

Note: Refer glossary for all acronyms

1. As of June 30, 2026

2. For petroleum, lubricants, chemicals, and vegetable oil

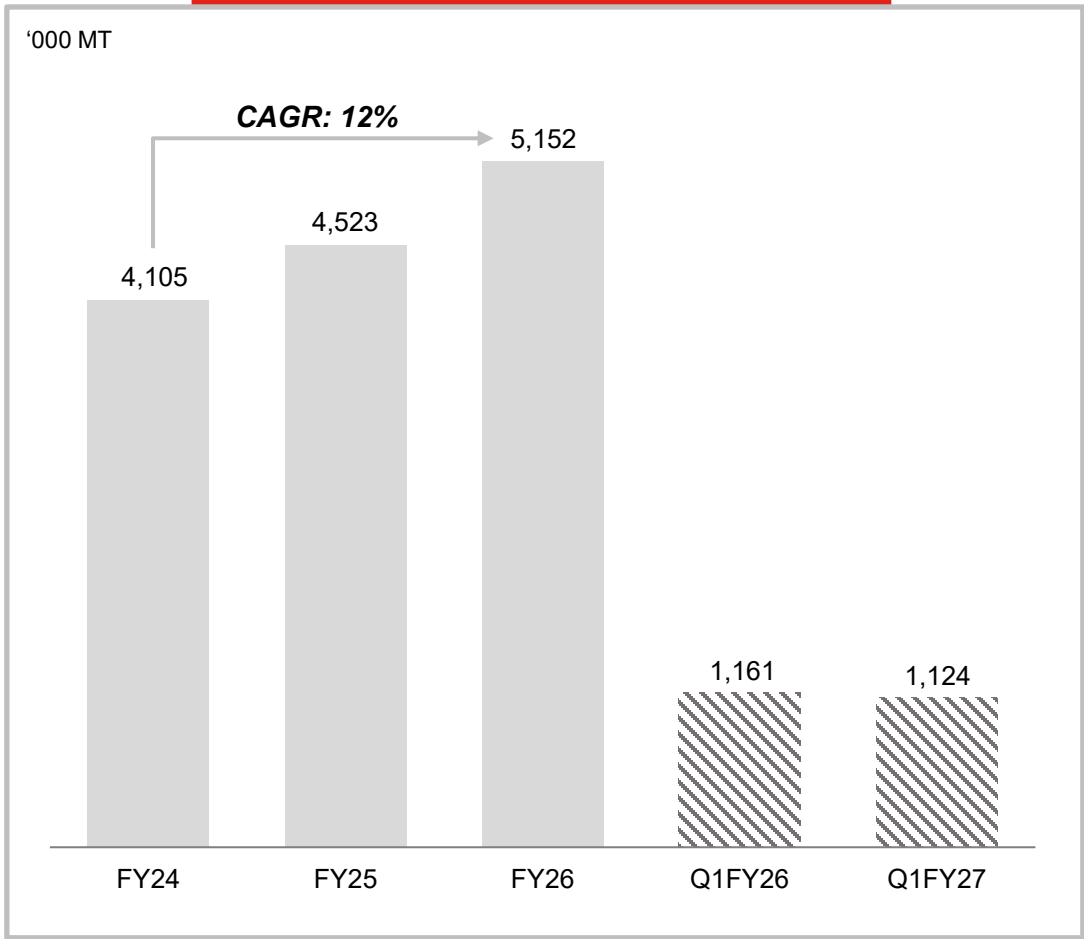
3. Upcoming LPG / gas expansions at JNPT

4. Normalized EBITDA - before forex, hedging-related expenses

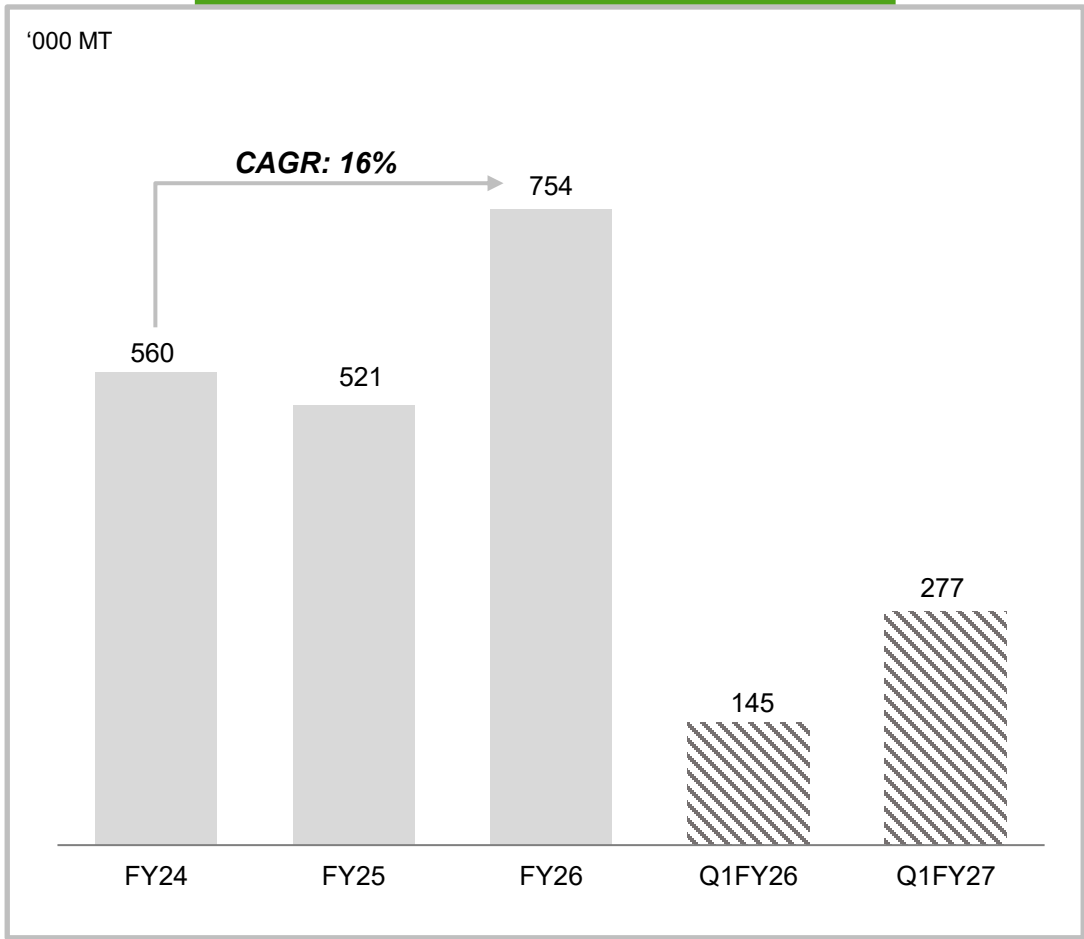
LPG record distribution volume drives profitability



Logistics

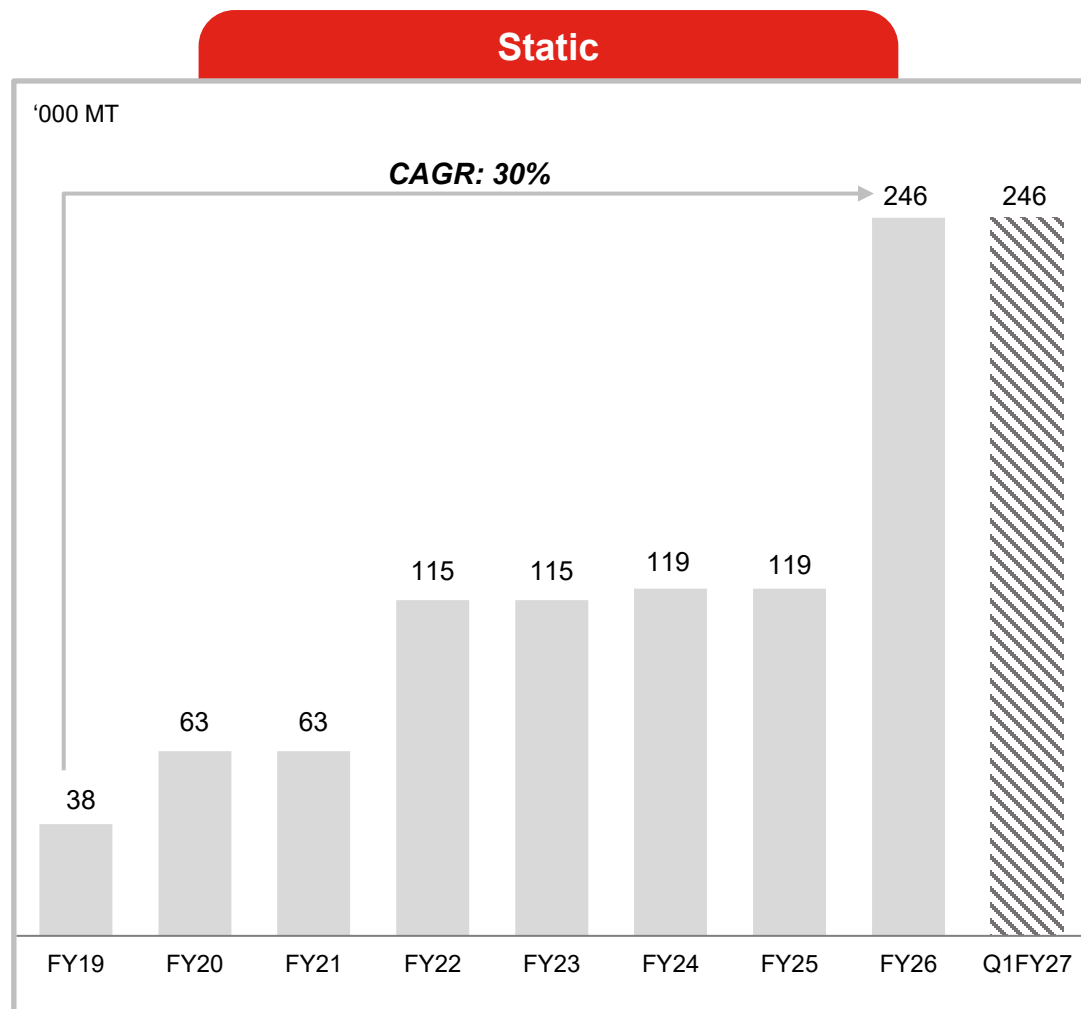


Distribution

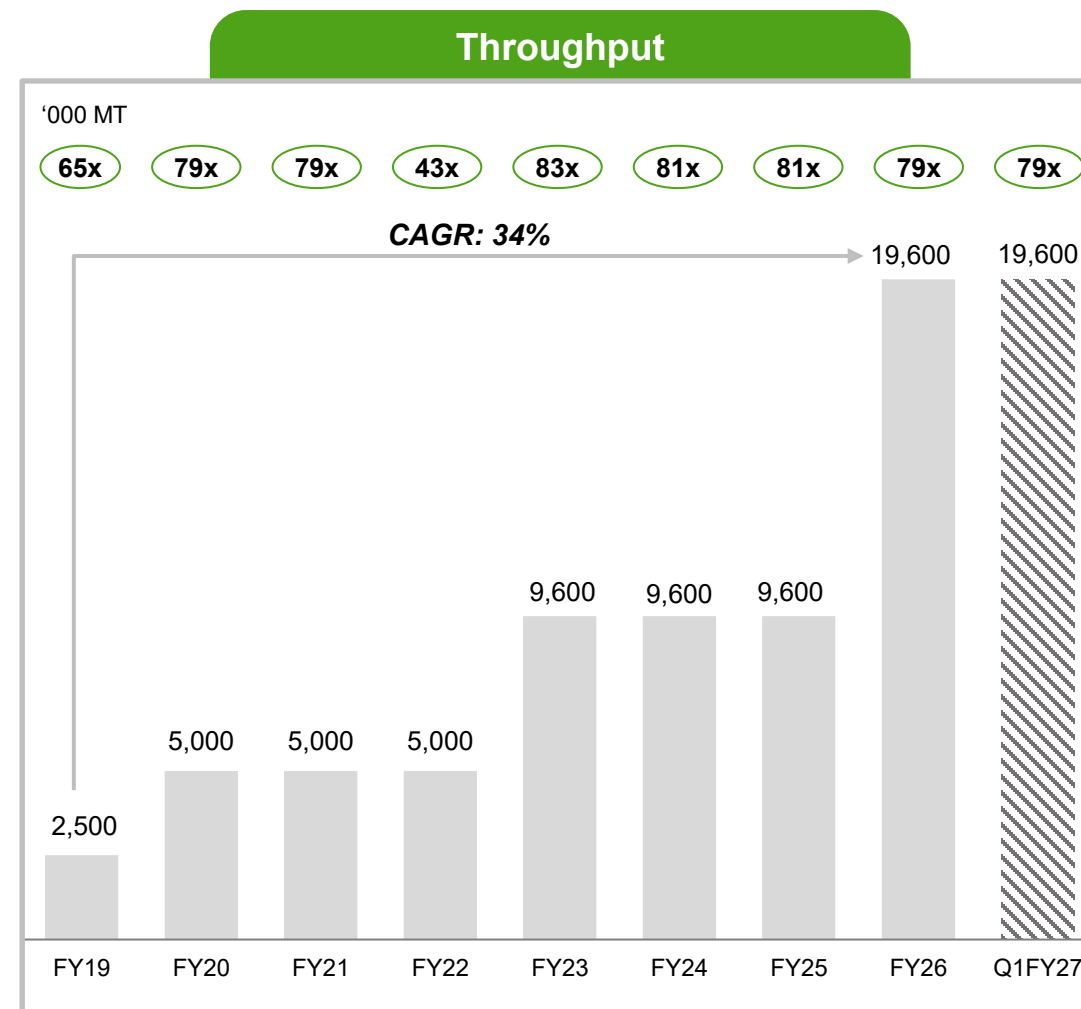


Note: Refer glossary for all acronyms

LPG terminalling capacity



Note: Refer glossary for all acronyms



○ Throughput-to-static turns

Necklace of terminals across both coasts of India



Network at a glance

Build, own, and operate India’s leading network of tank terminals and distribution facilities¹, incorporating the safety and environmental standards

Presence across India's coastline



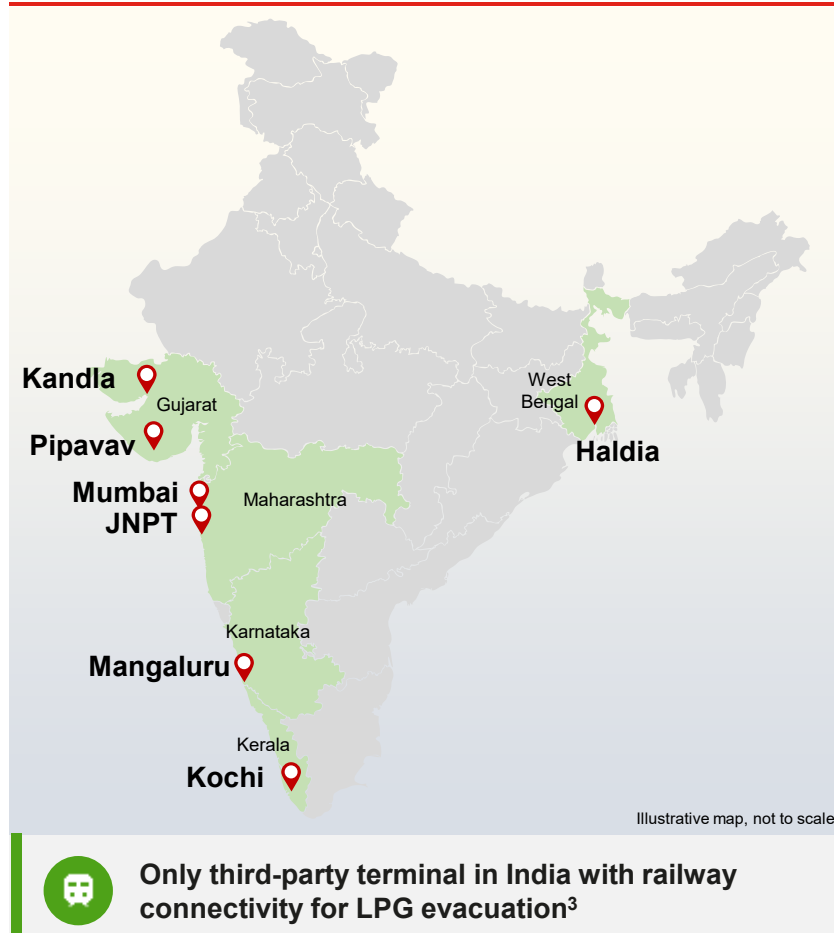
Port-wise terminal presence

Kandla Gujarat	Liquid	Gas
Pipavav Gujarat	Liquid	Gas ²
Mumbai Maharashtra	Liquid	Gas
JNPT Maharashtra	Liquid	Gas ³
Mangaluru Karnataka	Liquid	Gas
Kochi Kerala	Liquid	—
Haldia West Bengal	Liquid	Gas

Note: Refer glossary for all acronyms
1. Source - CRISIL research
2. Includes ammonia terminal at Pipavav
3. Upcoming gas terminal at JNPT

Our tank storage infrastructure

Terminal locations



Largest private sector liquid and LPG terminal operator in India^{1,3}

Aegis owns, operates and builds terminals for open markets, providing tailored solutions to bridge gaps in the gas value chain, enabling faster, more efficient access to all our customers

c.2.0mnKL

Existing liquid storage

c.0.5mnKL

Upcoming liquid storage

2,45,800MT

Existing gas storage

1,65,000MT²

Upcoming gas storage

Port	Liquid storage (KL)		Gas storage (MT)		Evacuation infrastructure				
	Existing	Upcoming	Existing	Upcoming	Road	Rail	Bottling	Pipeline	Jetty
Kandla	952k	94k	48k	—	✓		✓	✓	✓
Pipavav	117k	—	c.71k	36k ²	✓	✓	✓	✓	✓
Mumbai	334k	64k	20k	—	✓			✓	✓
JNPT	102k	318k	—	129k	✓		⌚	⌚	✓
Mangaluru	193k	—	82k	—	✓	⌚	⌚	⌚	✓
Kochi	83k	50k	—	—	✓				✓
Haldia	227k	—	25k	—	✓		✓	⌚	✓
Total	2,008k	526k	c.246k	165k					

 Under completion
  Completed

Note: Refer glossary for all acronyms

1. Capacity metrics as of June 30, 2026

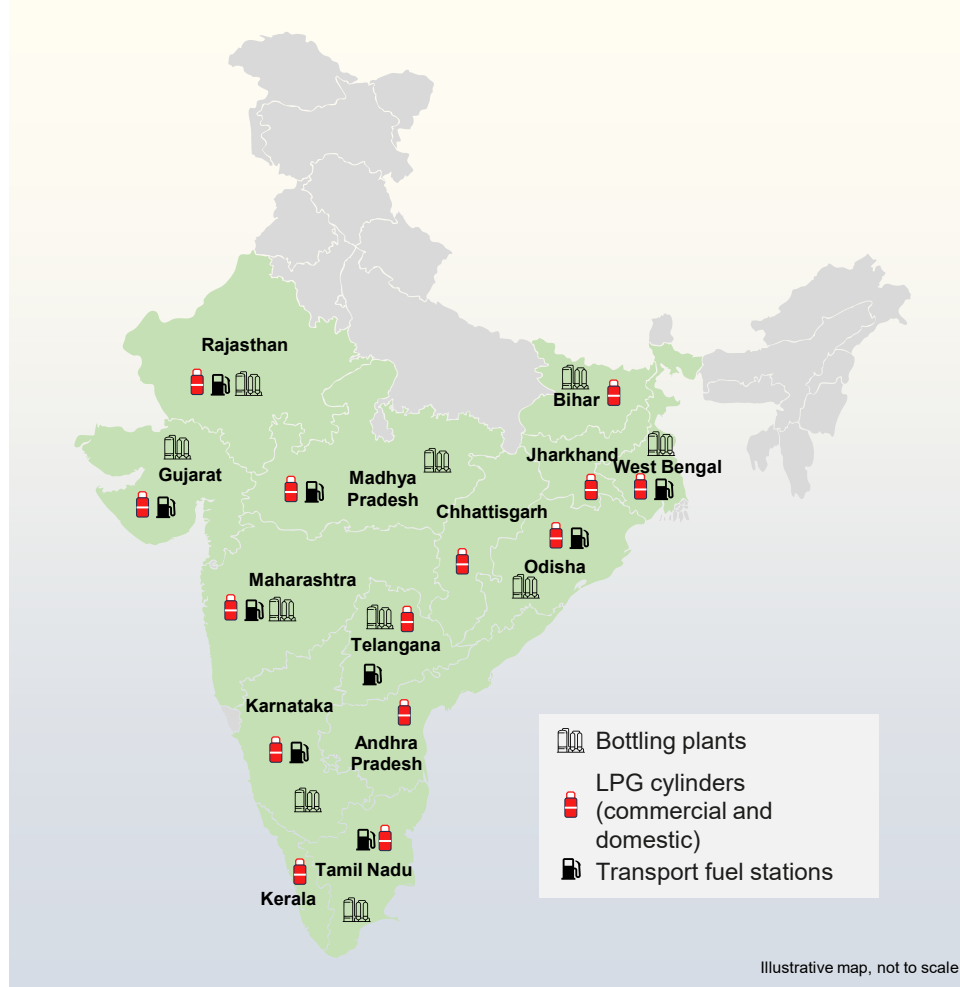
2. Includes ammonia storage capacity of 36,000MT at Pipavav, which got

commissioned on August 10, 2026

3. Source - CRISIL research

Our LPG distribution network

Pan-India LPG reach



We are expanding the footprint of LPG products and services across major Indian cities through our wide range of **domestic, commercial, industrial cylinders, transport fuel stations, bottling plants and other services**



Aegis: Your one-point contact for all energy solutions



Imported product



Supply from own terminals and bottling plants



Adherence to safety standards



Experienced and professional team



Positive environmental impact and sustainable brand image

Key strategic partners



Partner since 2014

Aegis Logistics Ltd.

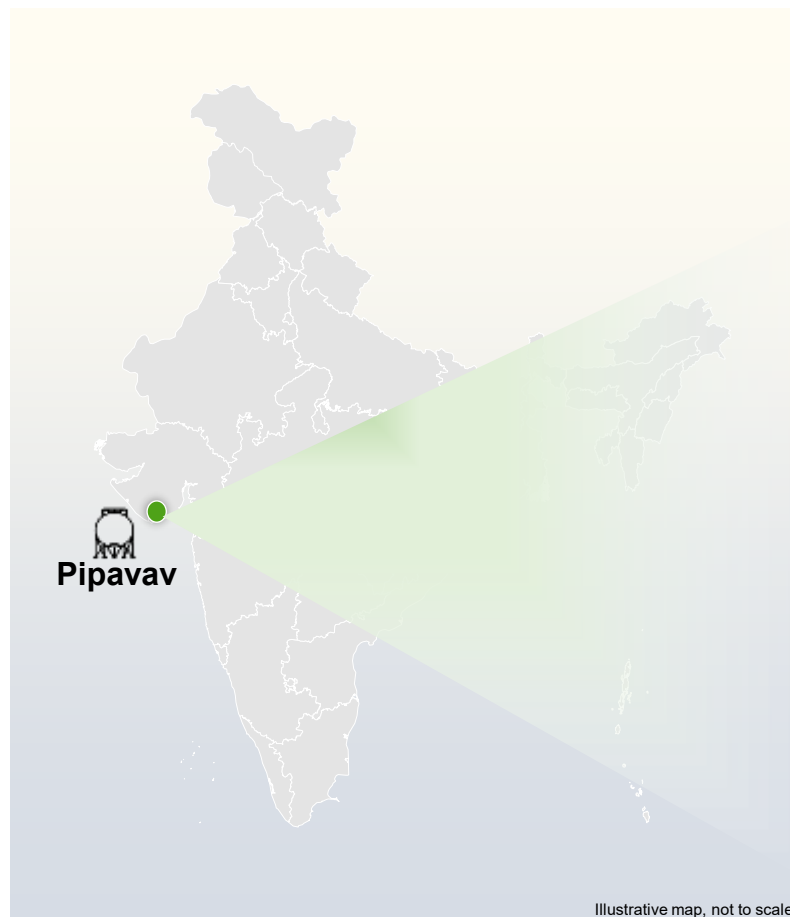
Partner since 2022

Key strengths	◆ Global gas sourcing and shipping ◆ Experienced board members on subsidiary boards		◆ Technical know-how to store new products ◆ Global customer relationships ◆ Innovative business models
MSCI ESG rating	AAA	AA	AAA

Note: Refer glossary for all acronyms

India's first independent ammonia storage terminal

Pipavav ammonia terminal



Commissioned in August 2026



Facility highlights

36,000MT¹

Static capacity

10%

ITOCHU stake in Aegis Terminal
Pipavav Ltd.

How the terminal creates value

1

First-mover positioning

Strengthens position in India's specialised chemicals and gas-logistics market

2

Ammonia distribution

Extends Aegis' distribution model to ammonia, creating potential value beyond storage fees

3

Energy transition platform

Exposure to potential long-term growth in ammonia and related energy-transition markets

Note: Refer glossary for all acronyms

1. As of August 10, 2026



Section 2:

Key investment highlights

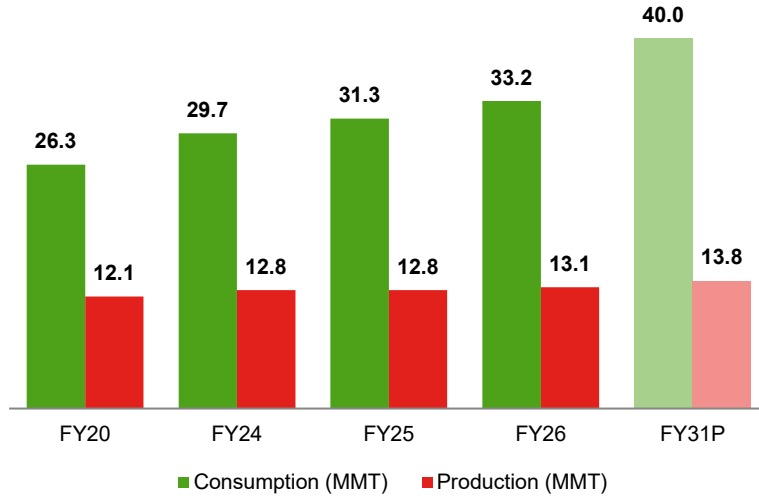
Key investment highlights



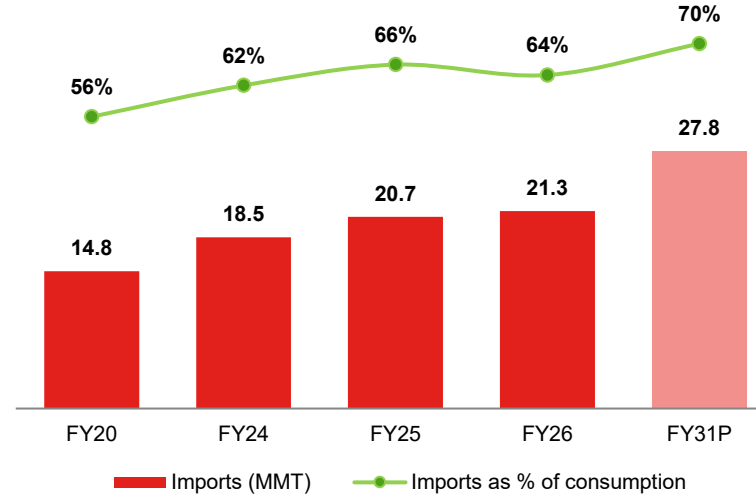
- 1** India's reliance on energy imports creates a long runway across LPG, liquids & chemicals and ammonia 
- 2** India's leading integrated oil, gas & chemical logistics company 
- 3** Integrated across the full LPG value chain, from global sourcing to last-mile distribution 
- 4** Multi-variate revenue model catering to both B2B and B2C segments 
- 5** Consistent earnings growth, improving margins and solid balance-sheet strength 
- 6** Experienced board and management team 

1 India's reliance on energy imports creates a long runway for LPG

Widening LPG demand supply shortfall



Imports plugging the gap



Demand across end-use segments



Supportive government policy



Pradhan Mantri Ujjwala Yojana

- Provides deposit-free LPG connections to women from poor households
- ~10.6cr connections as of June 2026



Active domestic LPG customers



Pipeline infrastructure



- Kandla-Gorakhpur**
Longest LPG pipeline in the world
2,805km, capacity 8.25MMTPA

- Jamnagar-Loni**
1,427km long pipeline, capacity of 3.3MMTPA

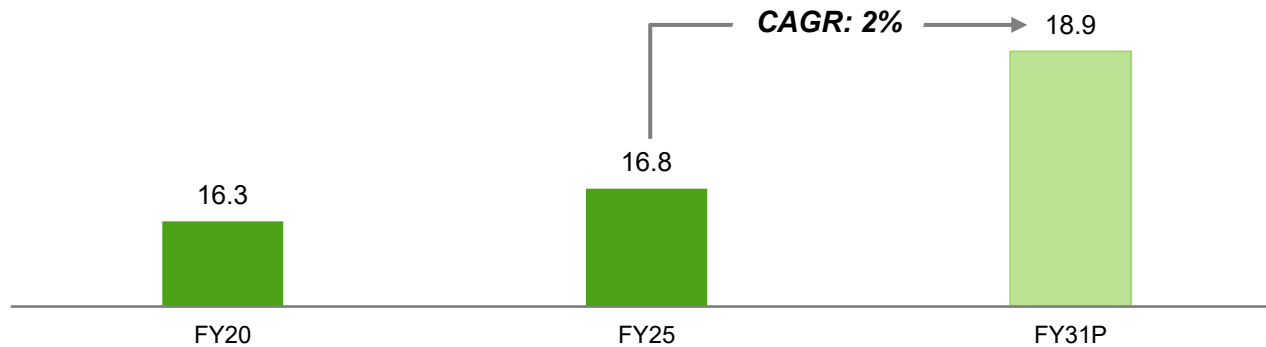
- Mangaluru-Hassan-Cherlapally**
Feeds into bottling plants at Anantpur and Cherlapally

- Uran-Chakan**
Feeds into bottling plants at Chakan & Shikrapur

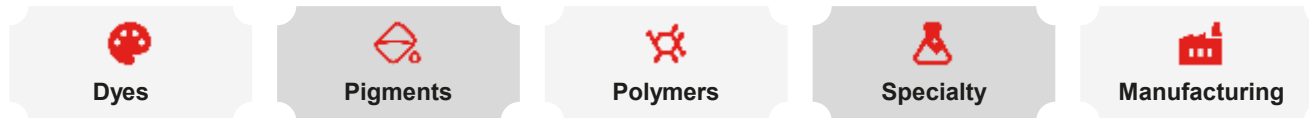
1 India's reliance on energy imports creates a long runway for liquids & chemicals

Robust growth in bulk chemicals trade...

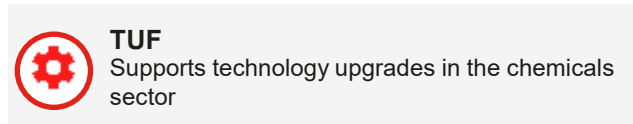
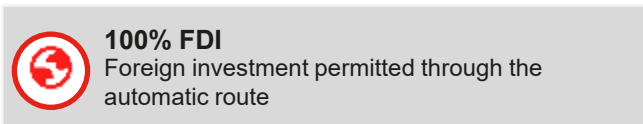
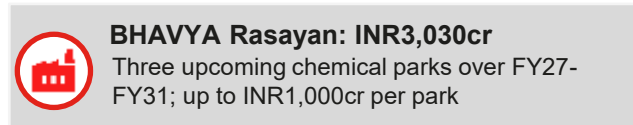
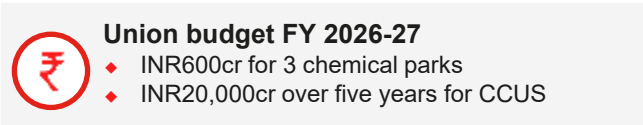
India Bulk Chemical Trade (MMT)



... driven by demand across end-use segments



Supportive government policy



Source: CRISIL research
Note: Refer glossary for all acronyms

India's chemical industry

6th
Largest chemical producer globally, 3rd in Asia

~7%
Contribution to India's GDP

80,000+
Products, from bulk to specialty chemicals

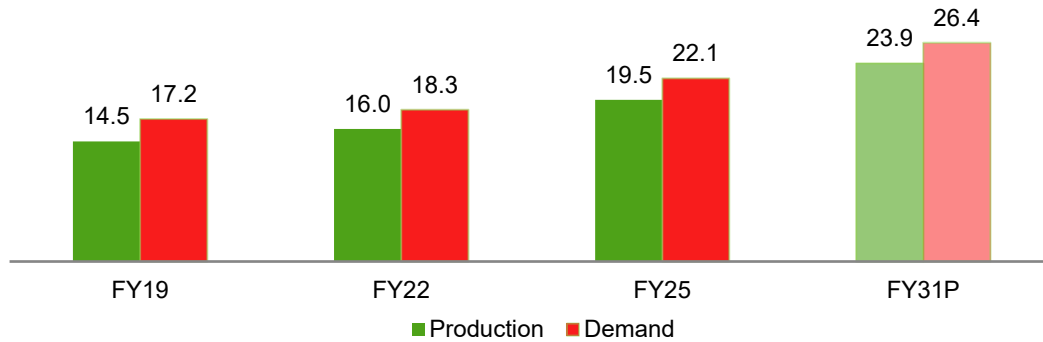
Overall liquid bulk trade mix across India



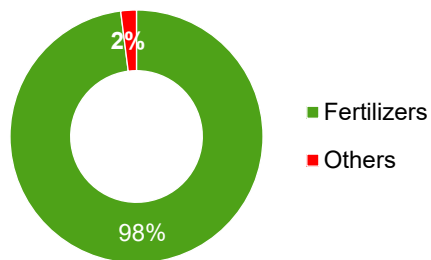
Key cluster	Aegis terminals	Share of demand (FY25)
Gujarat	Kandla, Pipavav	42%
Mumbai	Mumbai port, JNPT	17%
East	Haldia	12%
South-East	-	13%
Others	Kochi, Mangaluru	16%
Total		100%

1 India's reliance on energy imports creates a long runway for ammonia

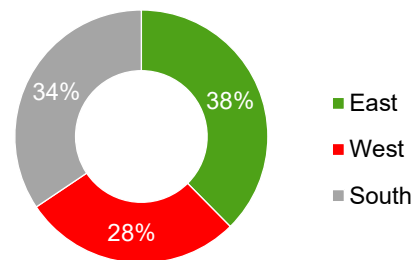
Imports of ammonia will help meet the increasing demand-supply deficit...
(MMT)



...which is attributed to fertilizer plants...



...securely spread across Indian peninsula...



Source: CRISIL research
Note: Refer glossary for all acronyms

Key drivers



Growth in non-urea fertilizers
~4–5% demand CAGR, FY24–FY29



Green hydrogen / ammonia
5MTPA green hydrogen by 2030

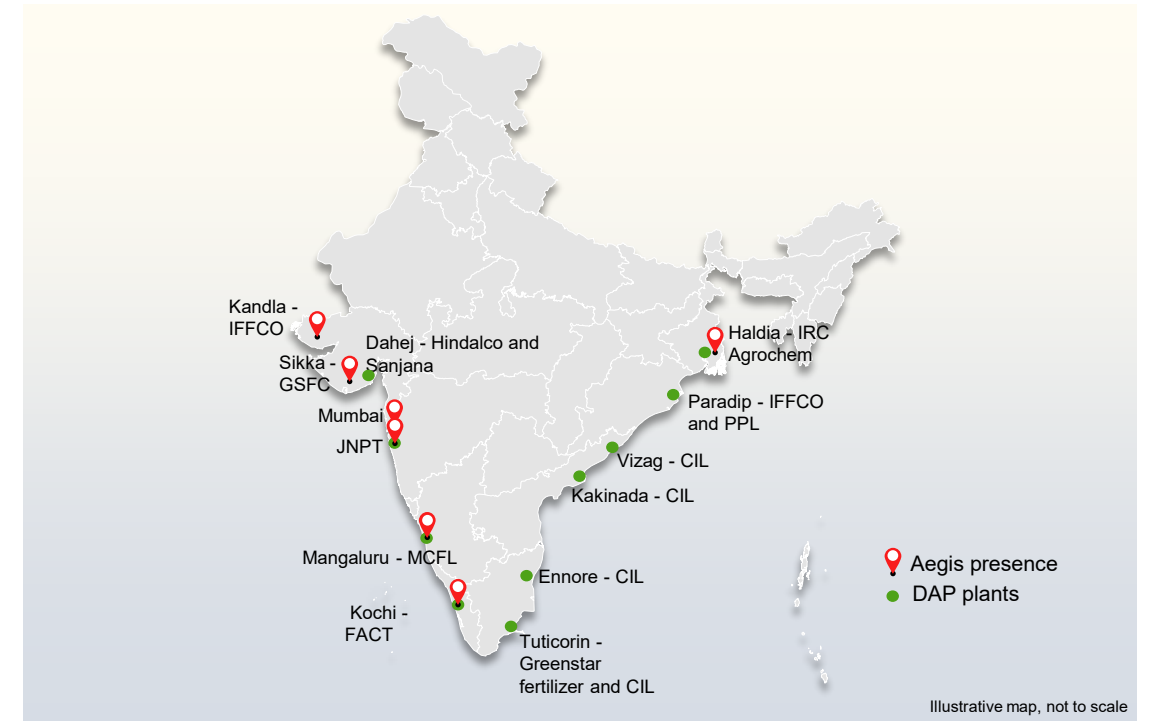


Industrial / HVAC demand
Cold chain, mining; ~1.5% CAGR (2026–2034)



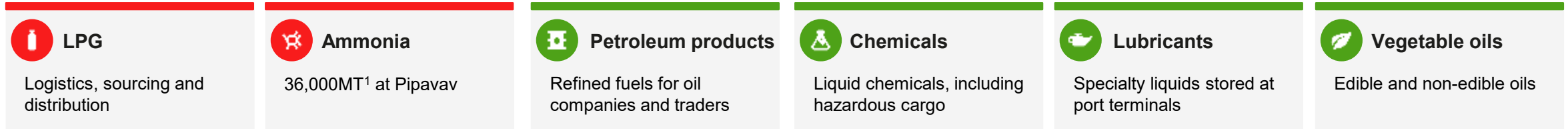
Rising population, food demand
India's population is 1.4bn, growing at ~0.5% p.a.

DAP fertilizer plants near ports are major consumption hubs for ammonia imports

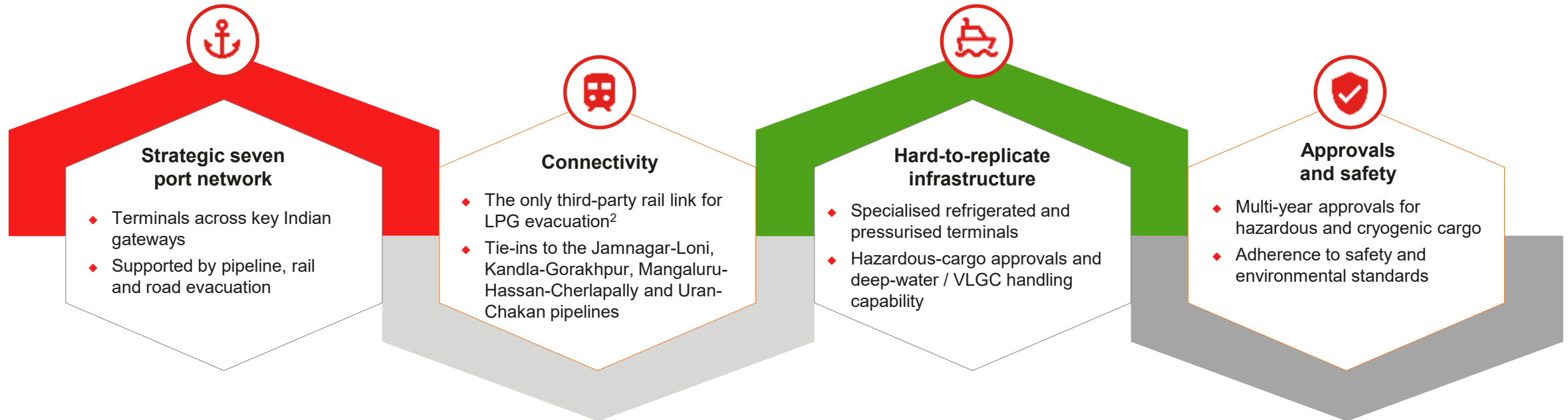


2 India's leading integrated oil, gas & chemical logistics company

One-point contact for all energy solutions



Competitive moat



Note: Refer glossary for all acronyms

- As of August 10, 2026
- Source - CRISIL research

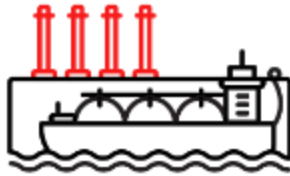
3 Integrated across the full LPG value chain, from global sourcing to last-mile distribution

Our integrated logistics services include sourcing, storing, moving, and distributing products



LPG sourcing

LPG sourcing JV with ITOCHU in Singapore



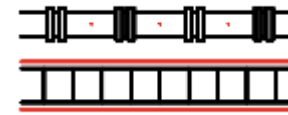
Strategic port location

Key gateway ports: Mumbai, Haldia, Pipavav, Kandla and Mangaluru



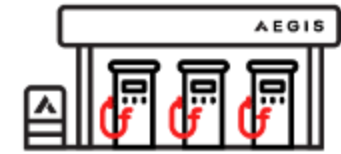
Storage terminals

Refrigerated gas terminals in Mumbai, Haldia, Kandla, Mangaluru and Pipavav, together with a pressurised gas terminal at Pipavav



Evacuation infrastructure

Pipelines, road, and rail connectivity

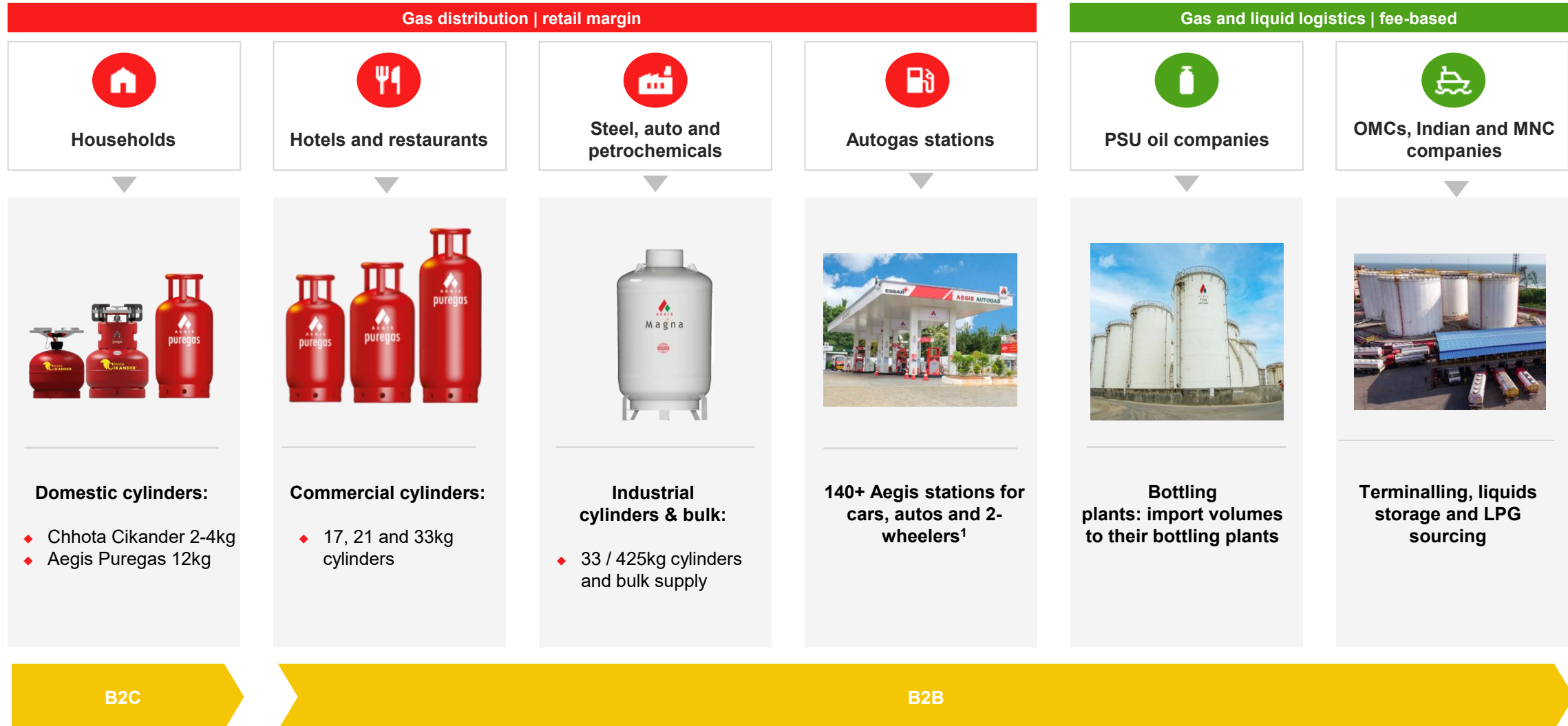


Autogas, commercial & industrial distribution

Network of Autogas stations and LPG distributors



4 Multi-variate revenue model catering to both B2B and B2C segments



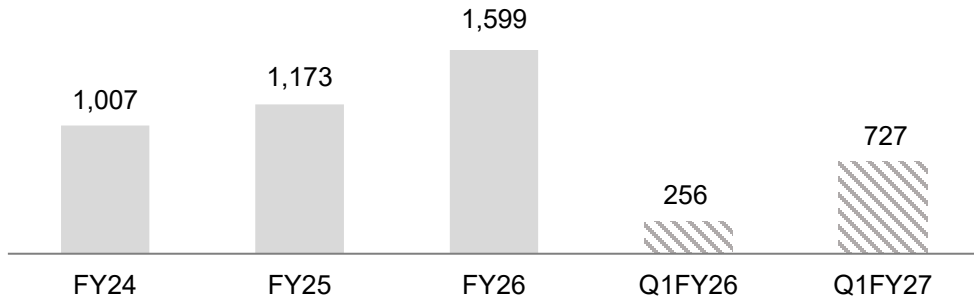
Note: Refer glossary for all acronyms

1. As of June 30, 2026

5 Consistent earnings growth, improving margins and solid balance-sheet strength

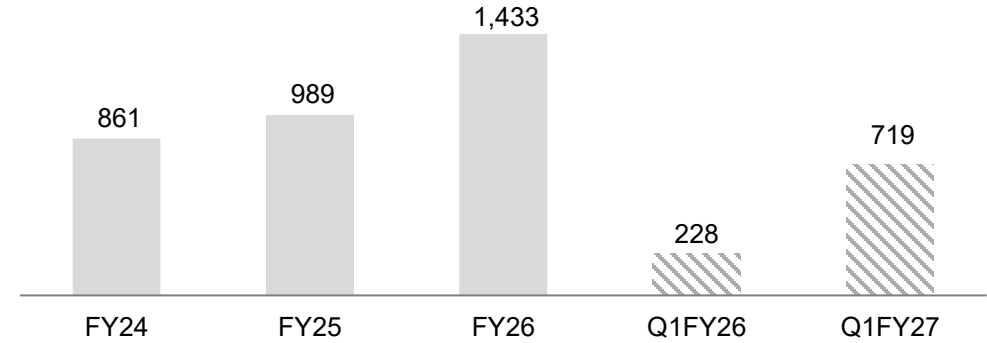
Normalized EBITDA¹

INR in cr.



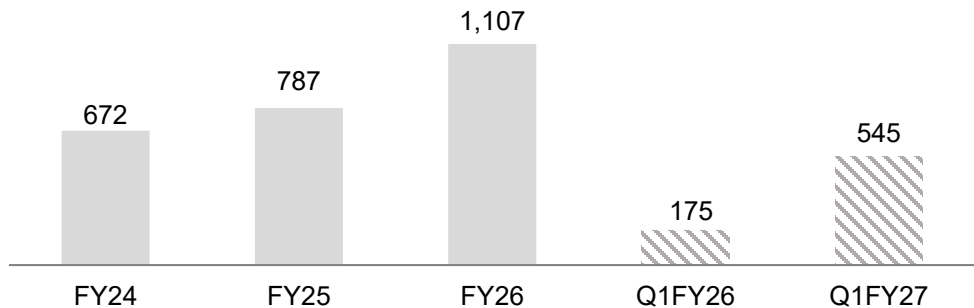
Profit before taxes

INR in cr.



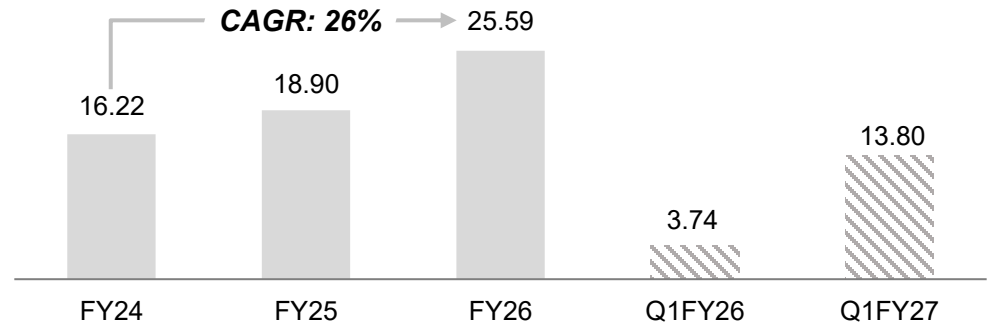
Profit after taxes

INR in cr.



Earnings per share²

INR per share



Note: Refer glossary for all acronyms

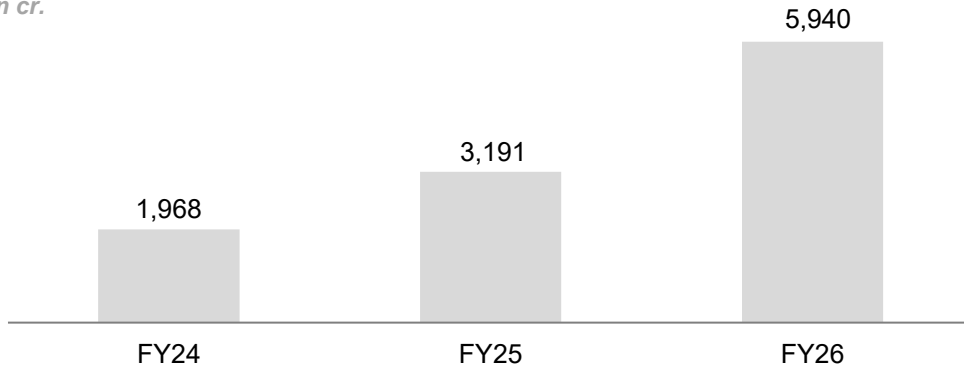
1. Normalized Earnings before Interest, Taxes and Depreciation & amortization (EBITDA) - before forex, hedging-related expenses

2. Consolidated diluted EPS

5 Consistent earnings growth, improving margins and solid balance-sheet strength (...contd.)

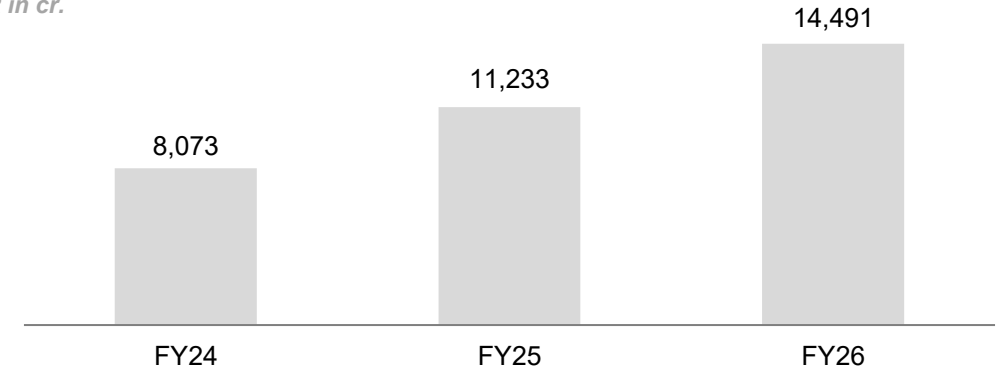
Expansion in liquidity reserves¹

INR in cr.



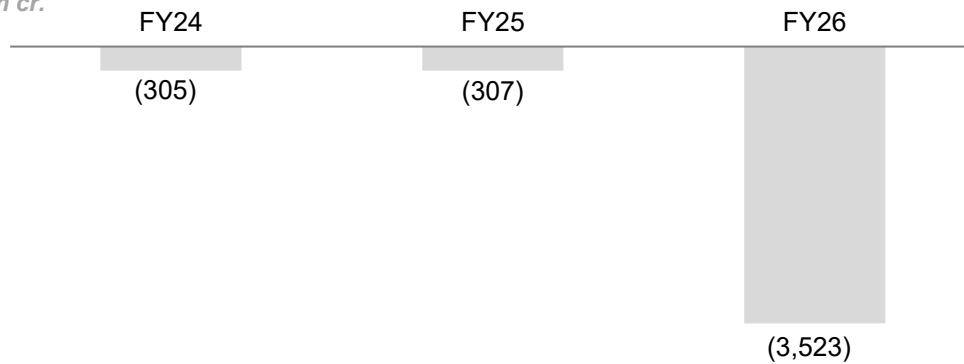
Total assets trajectory

INR in cr.



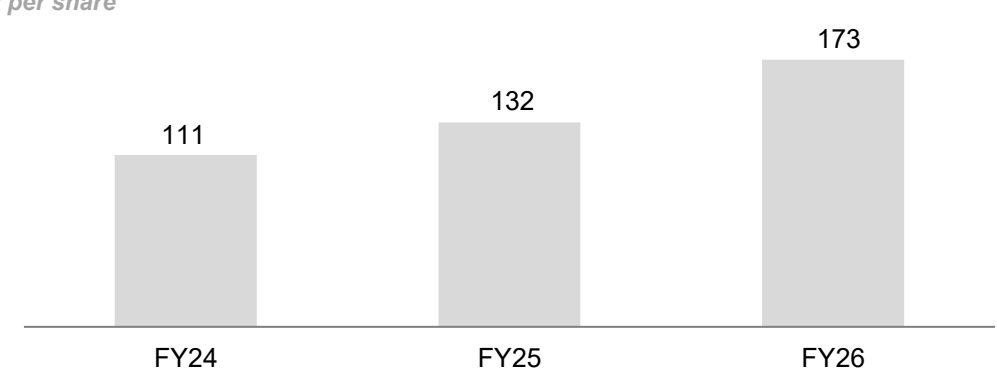
Net debt / (Net cash)

INR in cr.



Book value per share²

INR per share



Note: Refer glossary for all acronyms

1. Includes non-current investment, current investment, cash & cash equivalents, bank balance
2. Book Value Per Share = (Total equity - Non controlling interest) / No. of equity shares outstanding

6 Experienced board and management team

Board of directors

Managing director



Non-executive directors



Independent directors



6 Experienced board and management team (...contd.)

Key managerial personnel and senior management



Raj Kapurchand Chandaria

Chairman and Managing Director



Sudhir Omprakash Malhotra

Chief Executive Officer



**Murad Mohammed Husein
Moledina**

Chief Financial Officer



Haripal Singh Mann

Vice President, LPG Retail Business



Rajiv Chohan

President, Business Development



Keshav Shenoy

President, Strategic Planning



Sneha Lavaraj Parab

Company Secretary



Section 3:

Growth strategy

Project GATI: Gateway access to India



01

Greenfield
expansion



02

Brownfield
expansion



03

Mergers &
acquisitions



04

New
energy



05

Big-ticket
projects

Proposed acquisition of majority stake in Tristar



*Aegis Logistics Limited via its step-down 100% subsidiary, Aegis Logistics International Pte Ltd (collectively “**Aegis**”), has entered into a definitive agreement under which Aegis proposes to acquire **c.89.8%** of Tristar Holdings Limited (“**Tristar**”) from Agility Tristar Holdings Limited, Gulf Investment Corporation and Diamond Holdings Limited for an **equity consideration of US\$ 809mn** (including contingent and interest for deferred consideration)*

*The proposed acquisition is subject receipt of regulatory approvals under the applicable competition and anti-trust laws and satisfaction of customary closing conditions. The acquisition is expected to be completed in **Q4 FY27***



Appendix

Q1FY27: Consolidated profit statement

INR in cr.	Q1FY27	Q1FY26	Y-o-Y %
Revenue	2,357	1,719	37%
Cost of sales	1,551	1,388	
Others	79	75	
Normalized EBITDA (Segment)*	727	256	184%
Net finance, hedging & forex-related expenses / (income)	(55)	(24)	
Depreciation	53	42	
Unallocated expenses	10	10	
Profit before tax	719	228	215%
Tax	174	53	
Profit after tax	545	175	211%
EPS (INR per share)	13.80	3.74	269%

* Normalized EBITDA - before forex, hedging-related expenses

Consolidated profit statement

INR in cr.	FY26	FY25	FY24
Revenue	8,333	6,764	7,046
Cost of sales	6,414	5,297	5,769
Others	320	294	270
Normalized EBITDA (Segment)*	1,599	1,173	1,007
Net finance, hedging & forex-related expenses / (income)	(72)	(21)	(4)
Depreciation	199	152	135
Unallocated expenses	39	53	15
Profit before tax	1,433	989	861
Tax	326	202	189
Profit after tax	1,107	787	672
EPS (INR per share)	25.59	18.90	16.22

* Normalized EBITDA - before forex, hedging-related expenses

Consolidated balance sheet

Assets (INR in cr.)	FY26	FY25	FY24
Non-current assets			
Property, plant and equipment	6,344	5,070	4,123
Capital work in progress	764	1,308	697
Other intangible assets	4	1	1
Goodwill	15	15	15
Financial assets			
Investments	919		–
Loan	45	45	–
Other financial assets	33	22	19
Current tax assets (net)	40	38	31
Deferred tax assets (net)	329	238	227
Other non-current asset	79	193	110
Total non-current assets	8,572	6,930	5,223
Current assets			
Inventories	129	185	64
Financial assets			
Investments	826	-	194
Trade receivables	481	693	513
Cash and cash equivalents	2,512	1,411	1,032
Bank balance other than above	1,683	1,780	742
Other financial assets	146	96	156
Other current assets	142	138	149
Total current assets	5,919	4,303	2,850
Total assets	14,491	11,233	8,073

Equities & Liabilities (INR In cr.)	FY26	FY25	FY24
Equity			
Equity share capital	35	35	35
Other equity	6,020	4,596	3,859
Equity attributable to owners	6,055	4,631	3,894
Non-controlling interest	2,729	1,091	568
Total equity	8,784	5,722	4,462
Liabilities			
Non-current liabilities			
Financial liabilities			
Borrowings	347	2,353	1,432
Lease liabilities	1,594	1,586	919
Other financial liabilities	60	59	56
Provisions	15	17	15
Deferred tax liabilities (net)	221	153	144
Other non-current liabilities	1	1	2
Total non-current liabilities	2,238	4,169	2,568
Current liabilities			
Financial liabilities			
Borrowings	2,070	531	231
Lease liabilities	140	136	83
Trade payables	707	445	435
Other financial liabilities	91	97	198
Other current liabilities	338	69	69
Provisions	7	12	10
Current tax liabilities (net)	116	52	17
Total current liabilities	3,469	1,342	1,043
Total equities & liabilities	14,491	11,233	8,073

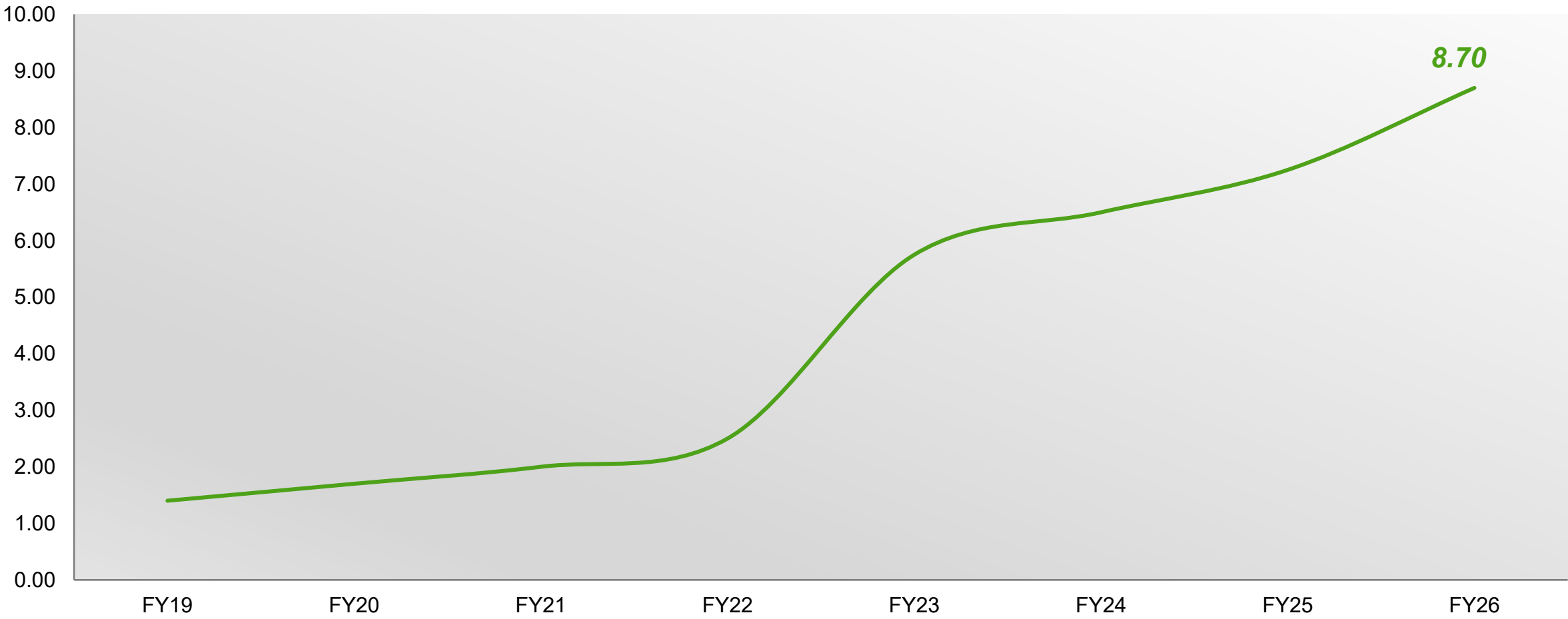
Consolidated cash flow

INR in cr.	FY26	FY25	FY24
Profit before tax	1,433	989	861
Operating profit before working capital changes	1,529	1,107	955
Net cash inflow / (outflow) from operating activities (A)	2,028	558	656
Net cash inflow / (outflow) from investing activities (B)	(2,533)	(1,462)	(712)
Net cash inflow / (outflow) from financing activities (C)	1,606	1,283	256
Net increase / (decrease) in cash and cash equivalents (A+B+C)	1,101	379	200
Cash and cash equivalents at the beginning of year	1,411	1,032	832
Cash and cash equivalents at the end of year	2,512	1,411	1,032

Dividend growth



INR per share



Glossary

B2B	Business to Business
B2C	Business to Consumer
Bn	Billion
CAGR	Compounded Annual Growth Rate
CCUS	Carbon Capture, Utilisation and Storage
Cr.	Crore
DAP	Diammonium Phosphate
EBITDA	Earnings before Interest, Taxes, Depreciation and Amortization
Normalized EBITDA	EBITDA - before forex, hedging-related expenses
EPS	Earnings Per Share
ESG	Environmental, Social and Governance
FDI	Foreign Direct Investment
FY	Financial Year
GDP	Gross Domestic Product
HVAC	Heating, Ventilation and Air Conditioning
INR	Indian Rupees
JNPT	Jawaharlal Nehru Port Trust
JV	Joint Venture

Kg	Kilogram
KL	Kilolitre
KT	Kilo Tonnes
LPG	Liquefied Petroleum Gas
MMT	Million Metric Tonnes
MMTPA	Million Metric Tonnes Per Annum
Mn	Million
MNC	Multinational corporation
MSCI	Morgan Stanley Capital International
MT	Metric Tonnes
OMCs	Oil Marketing Companies
PAT	Profit After Tax
PBT	Profit Before Tax
PMUY	Pradhan Mantri Ujjwala Yojana
PSU	Public sector undertaking
Q1 / Q1FY	First quarter / First quarter of the financial year
TUF	Technology Upgradation Fund
VLGC	Very Large Gas Carrier

Thank you



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