Trust & Technology Delivered

IC Electricals Company Limited

H1FY27 Earnings & Investor Presentation



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About IC Electricals Company Limited

Trust & Technology Delivered

2 decade of legacy

700+ track Km. electrification executed

B2G Model

ISO 9001:2015 Certified

3 manufacturing units in Haridwar with dedicated R&D Facility

1,780.75 Sq. mt. Total Manufacturing Area

24+ product portfolio

288 Total employees

RDSO approved

Order Book(In ₹ Lakhs) ₹ 23,105.50 Lakhs as on 30th Sept-26

- **IC Electricals Company Limited** (The Company, IC Electricals) is involved in manufacturing electronic equipment for Railway applications and provides advanced engineering solutions to Indian Railways.
- Its product range includes regulators, battery chargers, emergency lights, inverters, microprocessor-based control systems, vigilance control devices, alternators, traction motors, and permanent magnet alternators with controllers, all compliant with the latest technical standards.
- The Company also undertakes turnkey railway electrification projects, covering the design, supply, erection, testing, and commissioning of 25 kV AC overhead equipment and traction substations.
- The Company primarily operates on a B2G model, is ISO 9001:2015 certified, and maintains a robust Quality Management System to ensure quality and reliability across its offerings.

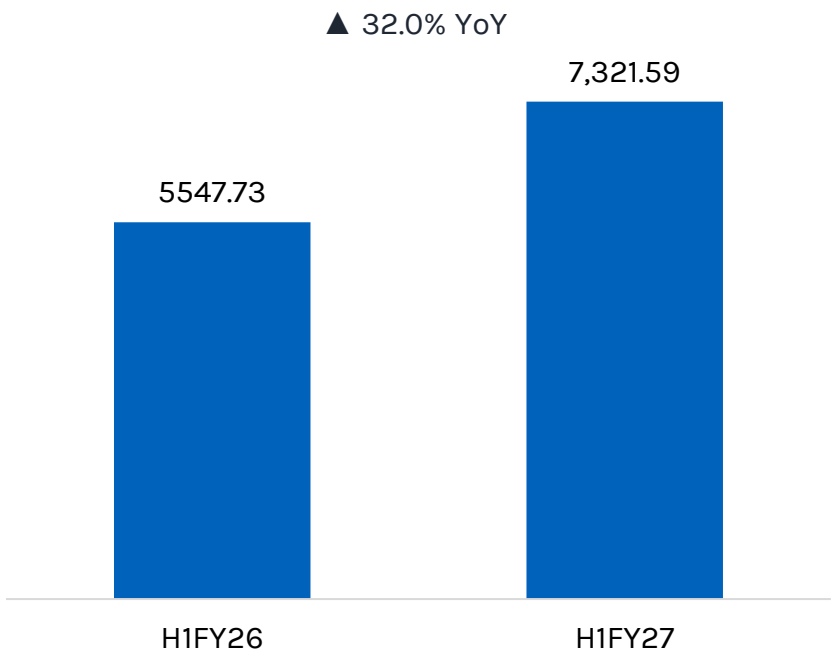


H1FY27 Earning Highlights - Standalone

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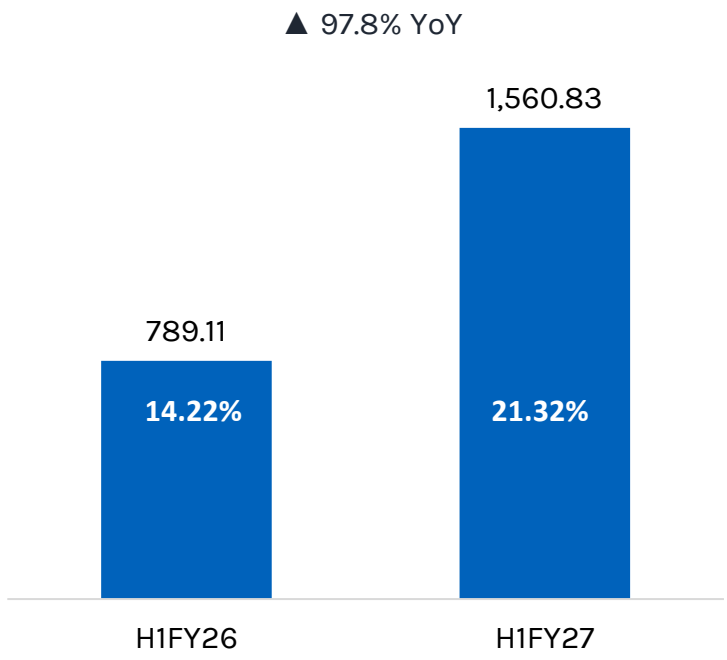
(In Lakhs)

Revenue from Operations



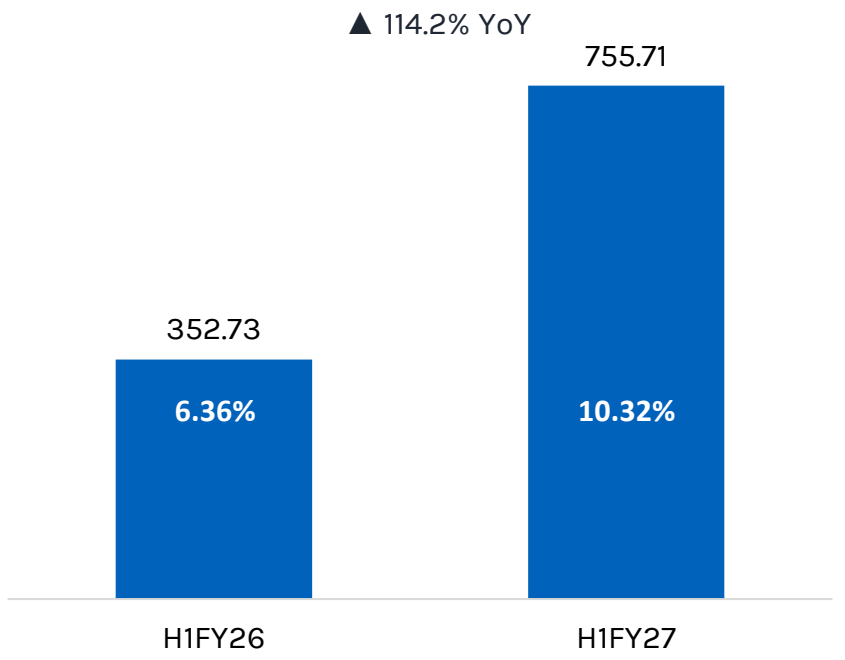
(In Lakhs)

EBITDA



(In Lakhs)

PAT

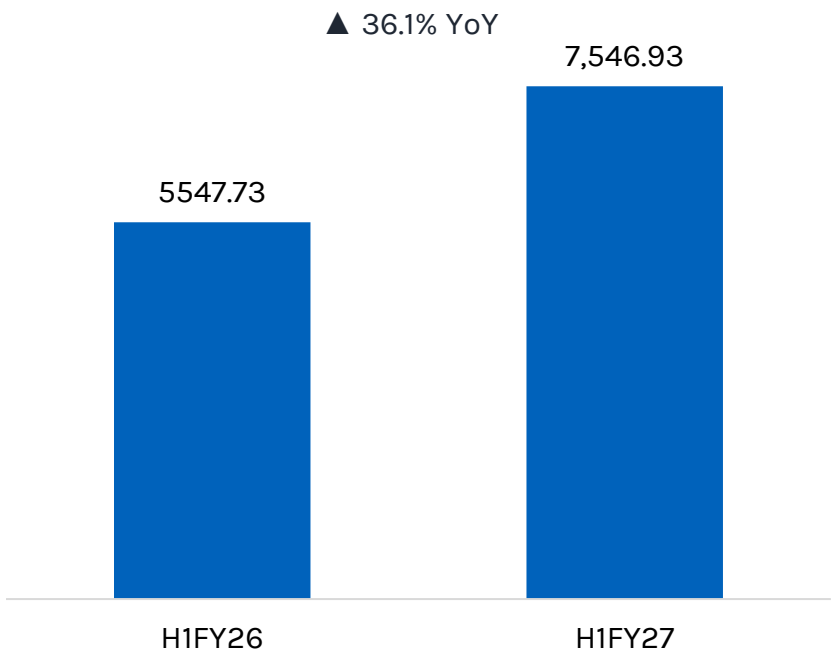


H1FY27 Earning Highlights - Consolidated

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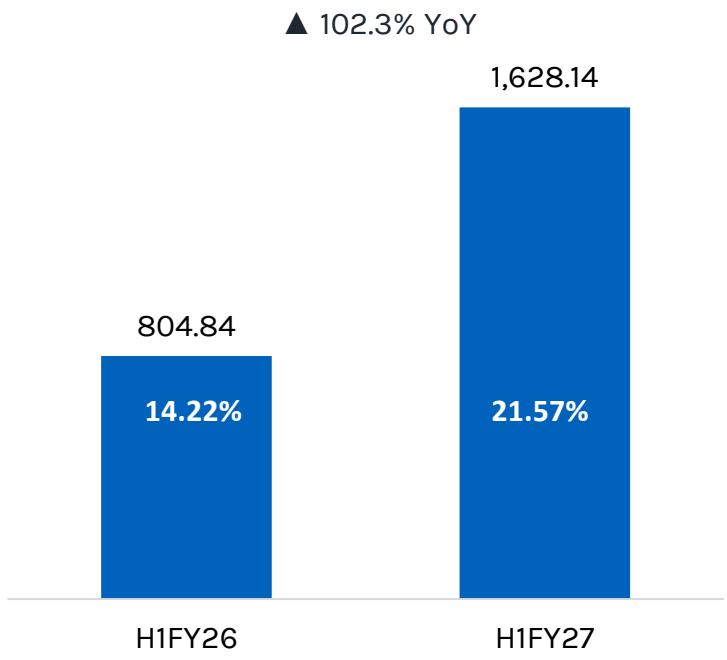
(In Lakhs)

Revenue from Operations



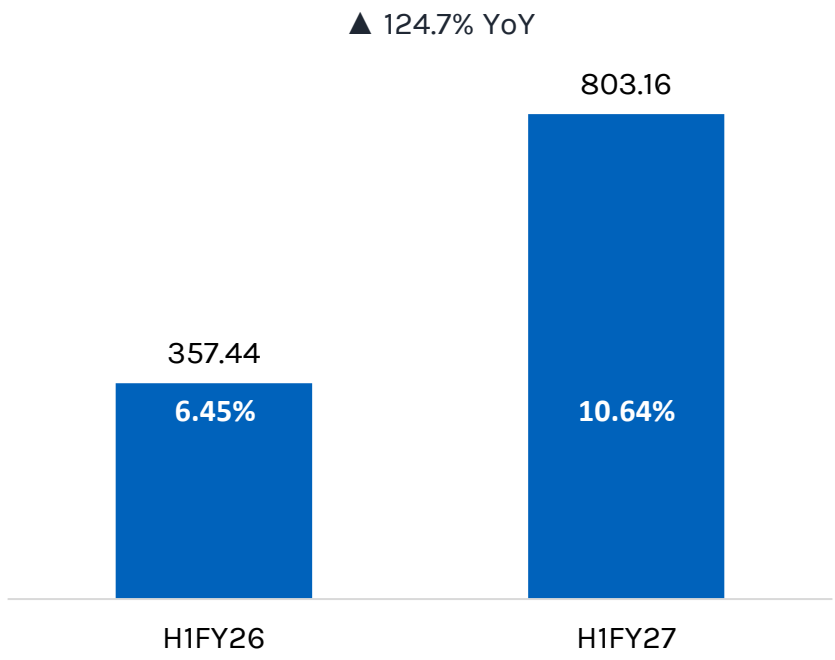
(In Lakhs)

EBITDA



(In Lakhs)

PAT



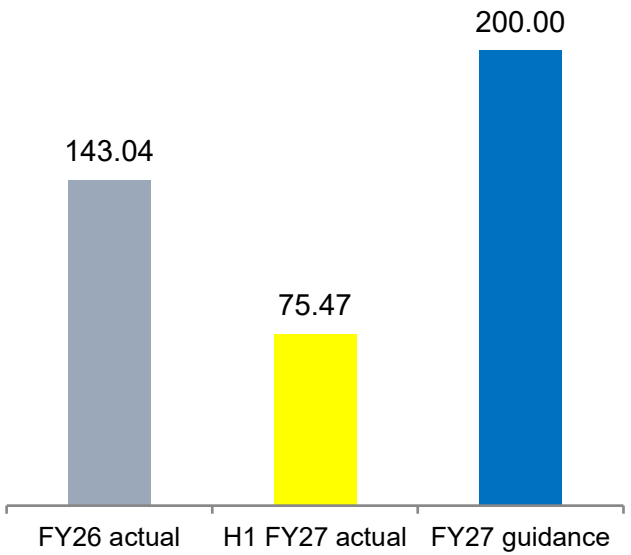
Management Commentary

Trust & Technology Delivered

A trusted supplier to Indian Railways, delivering reliable and compliant solutions

Guidance of ₹ 200 Cr+ implies about 40% growth over FY26; H1 has delivered 38% of it, with H2 traditionally the stronger half (H2 FY26: ₹ 87.59 Cr).

FY27 turnover guidance (consolidated, ₹ Crore)



Business Outlook & Revenue Guidance

Revenue guidance: Backed by a solid order pipeline, timely execution of key contracts and expanded manufacturing capabilities, management estimates a consolidated turnover of ₹ 200 Crore and above for the financial year ending March 2027 (FY27). H1 consolidated revenue stands at ₹ 75.47 Crore

Focus: The company remains focused on market positioning, optimising working capital cycles and delivering sustainable, profitable growth across all operational verticals.

Technology & R&D: Our growth strategy is anchored by a strong commitment to technological innovation, powered by a multidisciplinary team of highly qualified engineering professionals in our in-house R&D division. R&D setup has been relocated at Delhi for better synergies.

Company is pursuing technical tie-up with Korean partners and Company's representatives have already visited Korea. The team is **developing next-generation**, high-performance product solutions engineered for the evolving operational and safety demands of Indian Railways and rapidly expanding Metro transit networks.

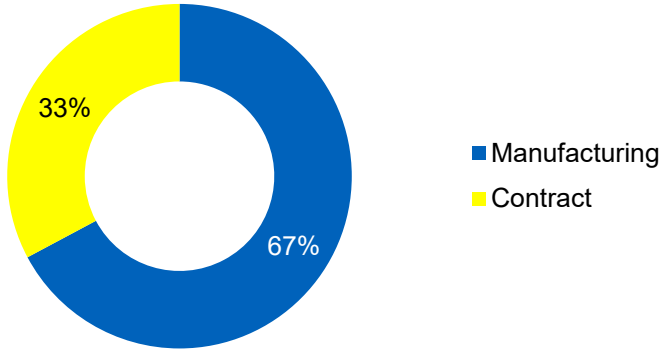
Segment Reporting (Standalone)

Trust & Technology Delivered

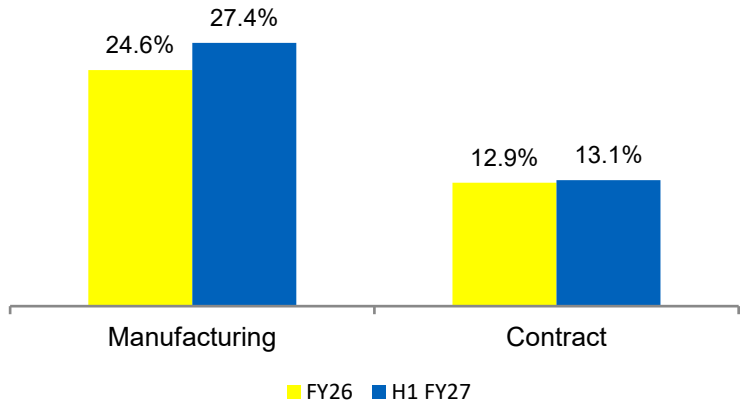
₹ in lakhs | H1 FY27 (half year ended 30.09.2026) vs FY26 (year ended 31.03.2026)

Particulars	Mfg. H1 FY27	Contract H1 FY27	Total H1 FY27	Mfg. FY26	Contract FY26	Total FY26
Segment revenue						
Revenue from operations	4,920.09	2,401.50	7,321.59	8,499.74	5,893.04	14,392.78
Segment result (before interest & tax)						
Segment result	1,349.58	315.14	1,664.72	2,089.09	757.26	2,846.35
Segment margin	27.4%	13.1%	22.7%	24.6%	12.9%	19.8%
Reconciliation to PBT						
Less: Finance cost			(479.78)			(792.53)
Add: Other income			30.32			51.43
Less: Unallocable expenses			(139.06)			(222.56)
Profit before tax			**1,076.20**			**1,882.70**
Capital employed						
Segment assets	9,647.71	12,100.96	21,748.68	8,536.25	9,873.03	18,409.28
Segment liabilities	1,213.03	2,269.71	3,482.74	1,444.59	2,437.16	3,881.75

Revenue mix, H1 FY27



Segment margin: H1 FY27 vs FY26



Both segments improved margins in H1 FY27 over FY26. Totals for segment assets exclude corporate assets; segment liabilities exclude corporate liabilities (mainly borrowings).

Segment Reporting (Consolidated)

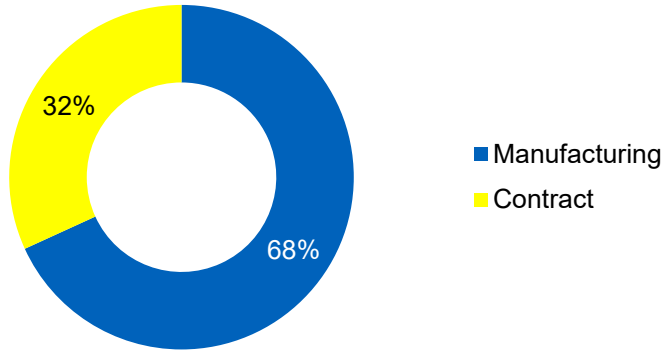
Trust & Technology Delivered

(In ₹ Lakhs & Margins In %)

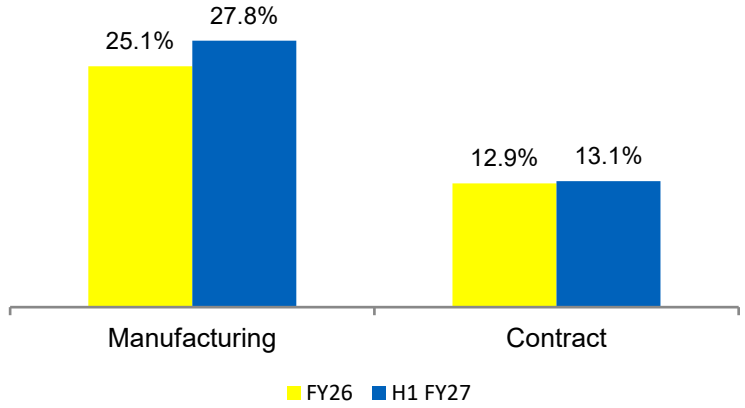
₹ in lakhs | H1 FY27 (half year ended 30.09.2026) vs FY26 (year ended 31.03.2026)

Particulars	Mfg. H1 FY27	Contract H1 FY27	Total H1 FY27	Mfg. FY26	Contract FY26	Total FY26
Segment revenue						
Revenue from operations	5,145.43	2,401.50	7,546.93	8,411.11	5,893.04	14,304.15
Segment result (before interest & tax)						
Segment result	1,428.00	314.88	1,742.88	2,109.42	759.03	2,868.45
Segment margin	27.8%	13.1%	23.1%	25.1%	12.9%	20.1%
Reconciliation to PBT						
Less: Finance cost			(488.51)			(808.06)
Add: Other income			36.33			77.02
Less: Unallocable expenses			(151.09)			(244.73)
Profit before tax			**1,139.61**			**1,892.68**
Capital employed						
Segment assets	9,828.71	12,192.33	22,021.04	8,626.51	9,979.31	18,605.81
Segment liabilities	1,227.83	2,428.67	3,656.50	1,619.81	2,492.50	4,112.31

Revenue mix, H1 FY27



Segment margin: H1 FY27 vs FY26



Both segments improved margins in H1 FY27 over FY26. Totals for segment assets exclude corporate assets; segment liabilities exclude corporate liabilities (mainly borrowings).

H1FY27 Profit & Loss Statement (Standalone)

Trust & Technology Delivered

(In ₹ Lakhs & Margins In %)

Particulars	30.09.2026 H1 (Unaudited)	31.03.2026 H2 (Unaudited)	30.09.2025 H1 (Unaudited)	31.03.2026 FY (Audited)
Revenue from operations	7,321.59	8,845.05	5,547.73	14,392.78
Other income	30.32	23.46	27.98	51.43
Total income	**7,351.91**	**8,868.51**	**5,575.71**	**14,444.21**
Cost of goods sold / materials consumed	4,080.88	4,902.65	3,433.80	8,336.46
Employee benefit expenses	665.00	588.10	603.26	1,191.36
Other operating expenses	1,014.87	1,444.63	721.57	2,166.18
EBITDA	**1,560.83**	**1,909.66**	**789.11**	**2,698.78**
Depreciation & amortisation	35.16	40.06	34.93	74.99
Finance costs	479.78	494.98	297.54	792.53
Profit before tax	**1,076.21**	**1,398.08**	**484.62**	**1,882.69**
Tax expense	320.50	337.38	131.89	469.28
Profit after tax	**755.71**	**1,060.69**	**352.73**	**1,413.42**
EBITDA margin	21.32%	21.59%	14.22%	18.75%
PAT margin	10.32%	11.99%	6.36%	9.82%

H1FY27 Profit & Loss Statement (Consolidated)

Trust & Technology Delivered

(In ₹ Lakhs & Margins In %)

Particulars	30.09.2026 H1 (Unaudited)	31.03.2026 H2 (Unaudited)	30.09.2025 H1 (Unaudited)	31.03.2026 FY (Audited)
Revenue from operations	7,546.93	8,758.58	5,545.57	14,304.15
Other income	36.33	40.35	36.66	77.02
Total income	**7,583.26**	**8,798.93**	**5,582.23**	**14,381.17**
Cost of goods sold / materials consumed	4,177.20	4,790.93	3,386.70	8,177.61
Employee benefit expenses	689.02	604.61	623.07	1,227.68
Other operating expenses	1,052.56	1,466.19	730.98	2,197.16
EBITDA	**1,628.14**	**1,896.87**	**804.84**	**2,701.69**
Depreciation & amortisation	36.35	41.56	36.42	77.97
Finance costs	488.51	502.59	305.47	808.06
Profit before tax	**1,139.61**	**1,393.07**	**499.61**	**1,892.68**
Tax expense	336.45	316.88	142.17	459.05
Profit after tax	**803.16**	**1,076.19**	**357.44**	**1,433.63**
EBITDA margin	21.57%	21.66%	14.51%	18.89%
PAT margin	10.64%	12.29%	6.45%	10.02%

Management Overview

Trust & Technology Delivered



Mr. Sunil Kumar Verma
Managing Director
31+ Years Of Experience



Mrs. Renu Verma
Non-Executive Director
30+ Years Of Experience



Mr. Sanjai Vishwakarma
Non-Executive Director
30+ Years Of Experience



Mrs. Savita Sachdeva
Non-Executive Director
30+ Years Of Experience



Mr. Rahul Varma
Whole Time Director
30+ Years Of Experience



Mr. Nitin Sarup Chowdhary
Independent Director
25+ Years Of Experience



Mr. Bhaskar Reddy Dasari
Independent Director
25+ Years Of Experience



Mr. Sanjay Pandey
Independent Director
40 Years Of Experience

Business Verticals

Trust & Technology Delivered



42%

Contracts Division

- Executes turnkey 25 kV AC OHE/PSI electrification projects.
- Services include design, supply, erection, testing, and commissioning for new and existing railway lines.



28%

Rotating Machines Division

- Produces alternators, traction motors, permanent magnet alternators, and various motor coils.
- Ensures reliable traction and auxiliary performance for railway operations.



30%

Electronics Division

- Manufactures railway electronic systems such as regulators, battery chargers, inverters, emergency lights, and Vigilance Control Device.
- Supports onboard power regulation, lighting, monitoring, and safety functions.

Backed by a healthy order book of ₹23,105.50 lakh as on 30th September 2026, the Company is well-positioned for sustained growth and revenue visibility.

Electronics Division Product Portfolio

Trust & Technology Delivered

A trusted supplier to Indian Railways, delivering reliable and compliant solutions



Electronic Rectifier-cum-Regulating Unit (ERRU) – 4.5 kW & 25 kW



Vigilance Control Device (VCD)



Regulated Battery Charger – 6.5 kW



Regulated Battery Charger – 4.5 kW, Rev.1



GPS-Based Passenger Announcement & Passenger Information System

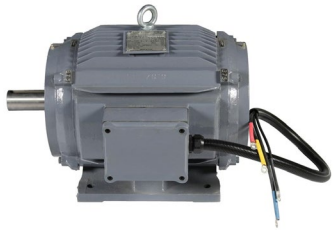


Emergency Light Unit (ELU) for Passenger Coaches

Rotating Machines Division Product Portfolio

Trust & Technology Delivered

A trusted supplier to Indian Railways, delivering reliable and compliant solutions



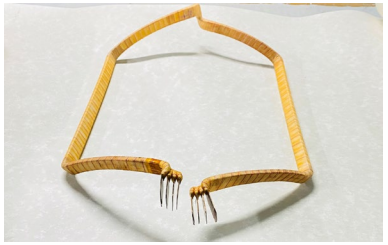
Auxillary Motor



4.5 kW & 25 kW Brushless Alternator for AC Coaches



Traction Motor for Indian Railways



Armature Coils for Traction Motors



GE 761 Armature Equalizer Coil



Main Field Coils for Traction Motors



1460 CP Coil (Commutating Pole Coil)



GE 761 Armature Coil



GE 761 Commutating Field Coil



GE 1259 Commutating Field Coil



GE 761 A23 Exciting Field Coil



GE 752 Armature Coil



GE 1264 Main Field Coil



D77 Armature Coil



GE 1259 Main Field Coil

Contracts Division

Trust & Technology Delivered

A trusted supplier to Indian Railways, delivering reliable and compliant solutions

The Contracts Division manages a wide portfolio of railway infrastructure projects, with a proven record of timely execution and over **700+ track kilometers** electrified across multiple railway zones.



KEY SEGMENTS

Detailed Engineering & Design

- Preparation of technical layouts, drawings, and specifications
- Full compliance with Indian Railway standards

Procurement & Supply Chain Management

- Timely sourcing of approved materials and equipment
- Strong vendor network ensuring quality and reliability

Execution & Erection

- Precision erection of 25 kV AC OHE systems
- Strict adherence to safety, quality, and industry protocols

Testing & Commissioning

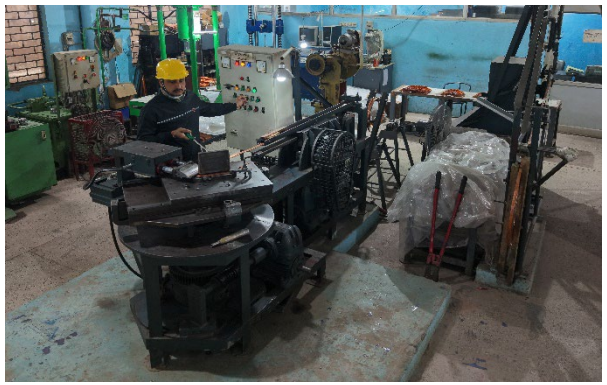
- Comprehensive quality checks and performance testing
- Ensures seamless integration and readiness for railway operations

Manufacturing Thrives & Quality Control

Trust & Technology Delivered





Strong Quality Governance
Follows a stringent Quality Management System aligned with ISO 9001:2015 standards.

Railway-Grade Compliance
Products tested and approved as per Indian Railways and RDSO specifications.

Rigorous Inspection Processes
Multi-stage inspections across material intake, in-process checks, and final testing.

Advanced Testing Infrastructure
Equipped with specialized testing setups for electrical, mechanical, and safety parameters.

Focus on Reliability & Safety
Ensures mission-critical equipment meets high performance, durability, and safety requirements.



Top 10 Completed Projects Under Contract Division

Trust & Technology Delivered

Total No. of Completed Projects: 18 | **Total Completed Projects Value: ₹21,374.08 Lakhs**

Project	Principal	Location	Value (In ₹ Lakhs)
Design, Supply, Erection, Testing & Commissioning of 25 kV, 50 Hz, Single Phase, AC, Electrification including OHE & TSS Works	Central Organization for Railway Electrification, Danapur	Bihar	**4,139.30**
Design, Supply, Erection, Testing & Commissioning of 25 kV, 50 Hz, Single Phase, AC, Electrification Works including OHE & TSS as Composite Electrical Works	Central Organization for Railway Electrification, Gorakhpur	Uttar Pradesh	**3,692.22**
Design, Supply, Erection, Testing & Commissioning of 25 kV, 50 Hz, Single Phase, AC, Electrification Works including OHE & TSS as Composite Electrical Work	Central Organization for Railway Electrification, Ambala	Punjab	**3,473.14**
Design, Supply, erection, testing and commissioning of 25 kV AC single phase OHE including modification of SSP/SP & Existing SCADA in connection with electrification of doubling between Amethi-pratapgarh section	Northern Railway Lucknow	Uttar Pradesh	**1,908.64**
Design, Supply, Erection, Testing & Commissioning of 25 kV AC single phase OHE for the Electrification `work of Deoband to Tapri	Northern Railway New Delhi	Uttar Pradesh	**1,713.39**
Design, Supply, erection, testing & commissioning of 25 KV OHE for the work of: (i) Doubling between Madhopur Punjab and Kathua (J&K)	Northern Railway Jalandhar City	Punjab / J&K	**862.98**
Routine Preventive and Breakdown Maintenance of newly constructed 25 KV Traction OHE lines with all associated equipment, fittings, PTFE neutral sections, Isolators including maintenance of Switching posts (SP/SSP), station ATs	Ircon Infrastructure & Services Limited	Dharamjaygarh & Bhalumuda	**705.69**
Routine Preventive and Breakdown Maintenance of newly constructed 25 KV Traction OHE lines with all associated equipment, fittings, PTFE neutral sections, Isolators including maintenance of Switching posts (SP/SSP), station ATs, Electrical general services work of station/service buildings/station platforms/quarters etc. between Kharsia-Korichhapar	Ircon Infrastructure & Services Limited	Chhattisgarh	**589.44**
Design, Supply, erection, testing & commissioning of 25 KV OHE for the work of Electrification between Amb-Andaura to Daulatpur Chowk over Ambala Division.	Northern Railway Ambala/Moradabad	Himachal Pradesh	**589.71**
Design, Supply, erection, testing & commissioning of 25 KV OHE for the work of "Electrification of GVK Thermal Power plant Siding at Khadur Sahib Station over Firozpur Division	Northern Railway Jalandhar City	Punjab	**481.30**

Top Ongoing Projects Under Contract Division

Trust & Technology Delivered

Project (Short Description)	Principal	Value (₹ Lakhs)	Start Date	Est. Completion
Design, Supply, Erection, Testing & Commissioning of double circuit 132KV/27 KV, 21.6/30.24 MVA Traction Sub- Station(TSS) at Amb- Andaura (AADR) on Nangaldam- Talwara Section	Northern Railway, Ambala/Moradabad	**2,331.76**	31.07.2025	30.05.2027
Design, Supply, erection, testing and commissioning of 50 Hz, 2x25 KV OHE including modification of existing OHE in connection with Kashi Yard remodeling Phase-I, 3rd line between Shivpur-Varansiand	Northern Railway, Lucknow	**1,903.67**	19.07.2025	19.07.2027
Design, Supply, Erection, Testing and commissioning of feeder wire for 2x25 KV system for raising of speed to 160/200 KMPH on existing Lucknow- Kanpur section	Northern Railway, Lucknow	**1,770.51**	13.02.2021	19.12.2026
Modification required in existing OHE arrangement & replacement of overaged OHE in connection with raising the speed to 160 kmph on existing NDLSCPYZ section & DLI Area of Delhi Division	Northern Railway, New Delhi	**1,837.42**	17.03.2022	17.12.2026
Design, supply, Erection, Testing & commissioning of 25 KV, 50 Hz, single phase, AC, OHE including new SP at Jhabrera, new SSP at RK, extension/Modification of existing SSP at DBD for the electrification work of :-Deoband- Roorkee new line	Northern Railway, New Delhi	**1,641.43**	26.02.2022	24.12.2026
Design, Supply, erection, testing & commissioning of 25 KV OHE for the work of "Longer Loop Lines at Chiheru, Kartarpur, Jandiala & Manawala Station over Firozpur Division	Northern Railway, Jalandhar	**1,413.00**	21.10.2022	20.11.2026
Design, Supply, Erection, Testing & commissioning of OHE modification work for raising of speed to 160/200 Kmph High Speed Work in Amausi - Manak Nagar	Northern Railway, Lucknow	**1,353.03**	09.05.2025	08.12.2026
Design, Supply, Erection, Testing & Commissioning of 25kV, 50 Hz, Single Phase, AC Electrification including OHE &TSS of 2nd line of Bagalkot-Wandal section	South Western Railway, Hubballi	**3,062.74**	21.05.2024	30.11.2026
Design, Supply, Erection, Testing &Commissioning of 25 KV AC single phase OHE in c/w construction of (i) New line between Daulatpur Chowk to Talwara station on Nangaldam- Talwara Section	Northern Railway, Ambala/Moradabad	**1,283.33**	05.06.2024	05.12.2026

Indian Locomotive Industry Key Highlight

Trust & Technology Delivered

Locomotive Expansion Plans

Indian Railways has a long-term plan to adopt new technology, including 12,000 HP and 9,000 HP electric locomotives for freight operations.

Anticipated Impacts of Indian Railways' Modernization Initiatives

- **Enhanced Passenger Experience**
- **Increased Safety**
- **Operational Efficiency**
- **Economic Growth**
- **Environmental Sustainability**

Strategic Initiatives & Investments

Government Budget Allocations:

- The rolling stock budget for FY26-27 is around ₹54,113 crore, higher than previous years.
- The FY26 Railway Budget is to prioritize new trains, station upgrades, modern infrastructure and high speed corridor

Focus on Freight Services:

- Higher locomotive production aims to strengthen freight services amid rising demand and supports the government's economic and infrastructure goals.

Technological Advancements:

Modern Locomotive Development:

- Focus on modern locomotives like the WAG-12 to improve power and efficiency.
- New technologies such as electric traction and automated controls are enhancing fleet performance.

Infrastructure Enhancements:

- Indian Railways is upgrading infrastructure and expanding its network through new lines, gauge conversions, and electrification projects.
- The Govt. is planning to invest over 3 Lakh Crores in next 7-8 Years, systematically convert existing Conventional 1x25kV to advanced 2x25kV traction system across India.

Source: DRHP Page 162

Business Strategies

Trust & Technology Delivered

Focusing On The Rail Contracts Division

The Company aligns with Government initiatives for railway modernization and 100% electrification.

Actively participates in projects for speed enhancement, network expansion, and high-speed corridors.

Targets opportunities arising from new freight corridors and modernization of existing routes.

Focus On Strengthening Exports & Targeting New Markets

Aims to expand into global markets where DC traction systems are still widely used (USA, Canada, Brazil, Mexico, Africa).

Leverages competitive advantage in manually engineered DC traction motors for international customers.

Anticipates growing domestic demand for AC traction motors at **10–15% per annum**.

Product Innovation

Focuses on developing microprocessor-based electronic systems and rotating electrical machines.

R&D team designs high-tech electrical equipment and customized control systems for railway applications.

Continually introduces new technologies to meet evolving operational and safety requirements.

Enhancing Working Capital Levels

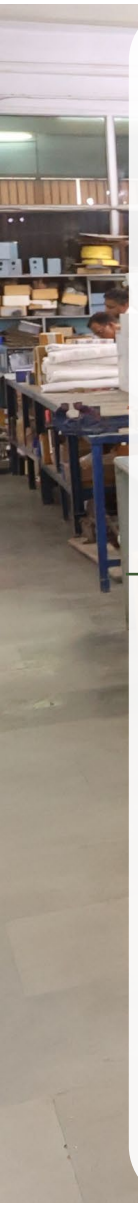
Plans to utilize proceeds and internal resources to strengthen working capital levels.

Ensures uninterrupted project execution and operational efficiency.

Intends to secure additional working capital limits to support future business growth.

Investment Rationale

Trust & Technology Delivered



1

Strong Presence in Railway Electronics & Electrification

- Operates across high-demand segments including electronic systems, rotating machines, and turnkey railway electrification.
- Supplies critical products such as regulators, chargers, inverters, VCDs, alternators, and traction motors.

2

Proven Execution Track Record

- Successfully completed multiple large-scale OHE projects across major Indian Railway zones.
- Demonstrated capability in delivering complex projects on time, ensuring high reliability and compliance.

3

Diversified Business Verticals

- Balanced portfolio across Electronics, Rotating Machines, and Contracts Division, reducing business risk.
- Offers both product-based and services-based revenue streams.

4

Strong B2G Business Model

- Majority of revenue derived from the Ministry of Railways and government departments.
- Ensures long-term demand visibility, stable order inflows, and predictable cash cycles.

5

Robust R&D and Product Innovation

- In-house R&D team developing microprocessor-based systems and high-tech electrical equipment.
- Focus on new product development, quality enhancement, and adapting products for domestic & export markets.

6

Experienced Management & Skilled Workforce

- Leadership team with 25–40 years of industry experience across engineering, power systems, operations, and R&D.
- Strong execution expertise and deep understanding of railway requirements.

7

Well-Equipped Manufacturing Infrastructure

- The facility is equipped with advanced production machinery, precision assembly systems, and comprehensive testing infrastructure, enabling the manufacture of a wide range of electrical, electronic, and railway application products.

Historical Financial and Operational Highlights

Trust & Technology Delivered

VERTICLE WISE REVENUE BIFURCATION

(Amount in ₹ Lakhs except %)

Particulars	FY26	% of Revenue FY26	FY25	% of Revenue FY25	FY24	% of Revenue FY24
Rotating Division	4039.44	28.24%	4060.57	33.31%	4462.66	44.96%
Electronic Division	4371.67	30.56%	2568.00	21.07%	812.00	8.18%
Contract Division	5893.04	41.20%	5560.02	45.62%	4650.26	46.86%
Total	**14304.15**	**100.00%**	**12188.59**	**100%**	**9924.92**	**100%**

GOVERNMENT AND NON- GOVERNMENT WISE REVENUE BIFURCATION

(Amount in ₹ Lakhs except %)i

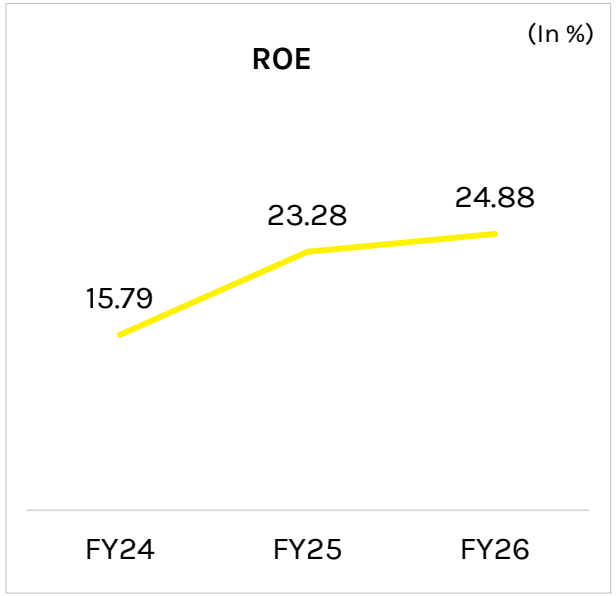
Particulars	FY26	% of Revenue FY26	FY25	% of Revenue FY25	FY24	% of Revenue FY24
Government	11730.61	82.01%	9933.16	81.50%	6722.83	67.74%
Non-Government	2573.54	17.99%	2255.43	18.50%	3202.09	32.26%
Total	**14304.15**	**100.00%**	**12188.59**	**100%**	**9924.92**	**100%**

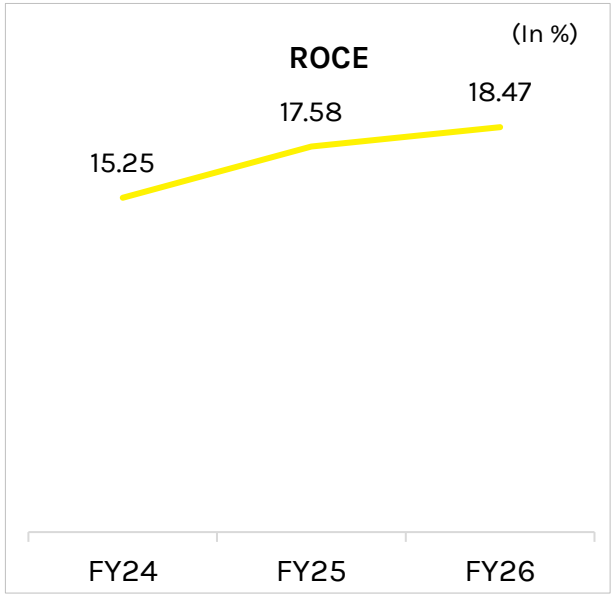
DOMESTIC SALES AND EXPORT SALES WISE REVENUE BIFURCATION

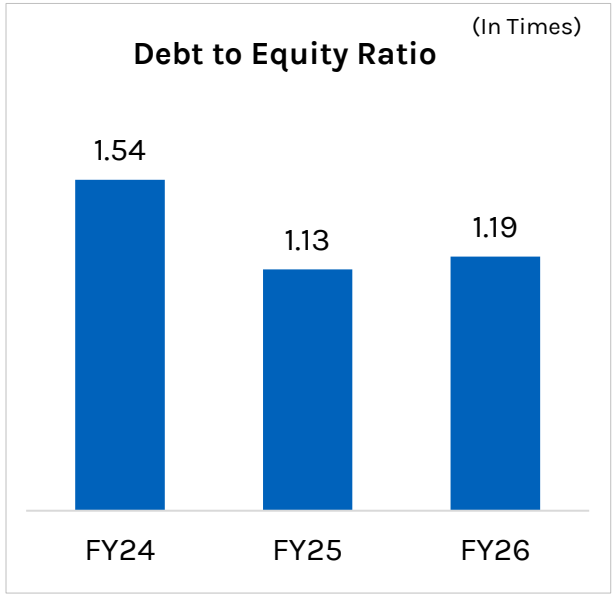
(Amount in ₹ Lakhs except %)

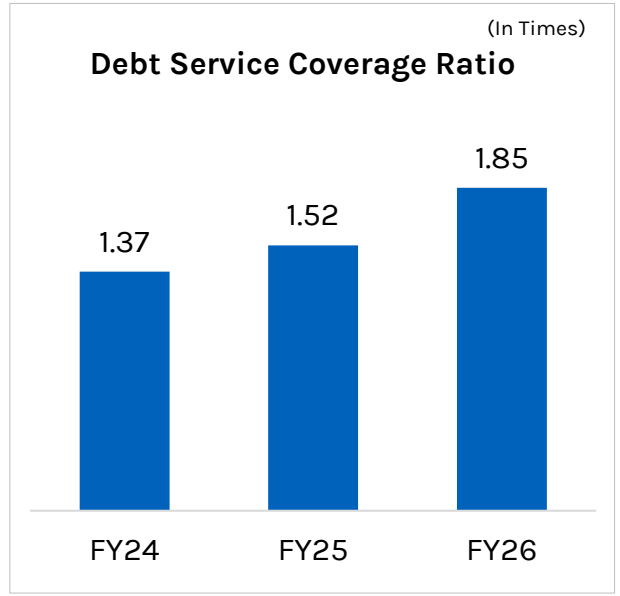
Particulars	FY26	% of Revenue FY26	FY25	% of Revenue FY25	FY24	% of Revenue FY24
Domestic Sales	13794.79	96.44%	11611.64	95.27%	8950.89	90.19%
Export Sales	509.36	3.56%	576.95	4.73%	974.03	9.81%
Total	**14304.15**	**100.00%**	**12188.59**	**100%**	**9924.92**	**100%**

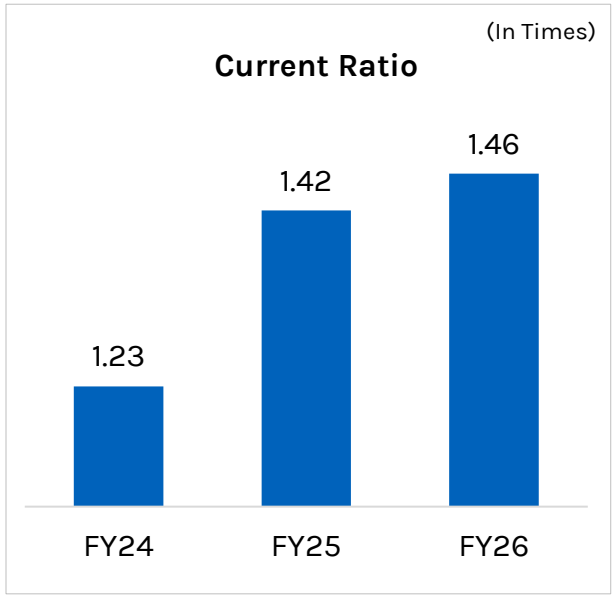
Historical Key Ratios

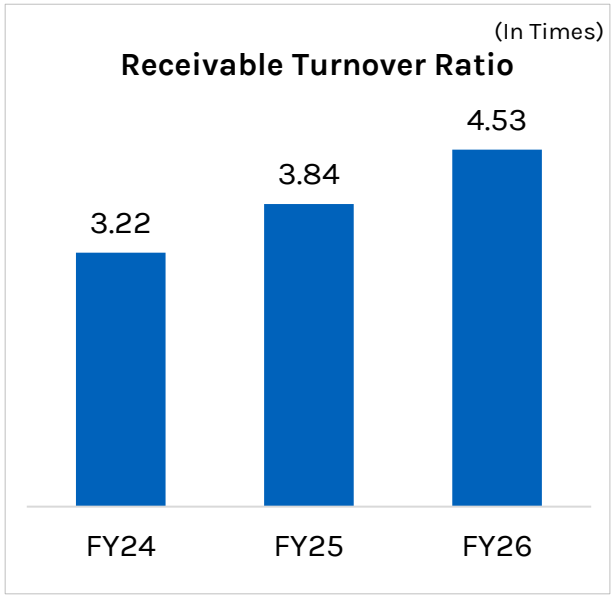


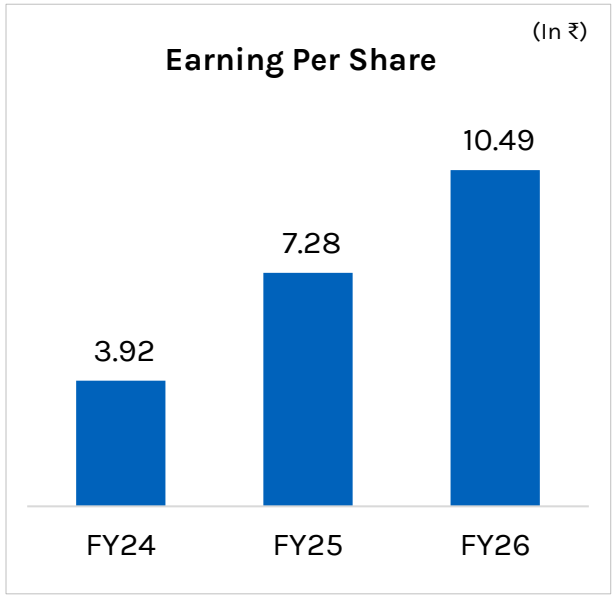


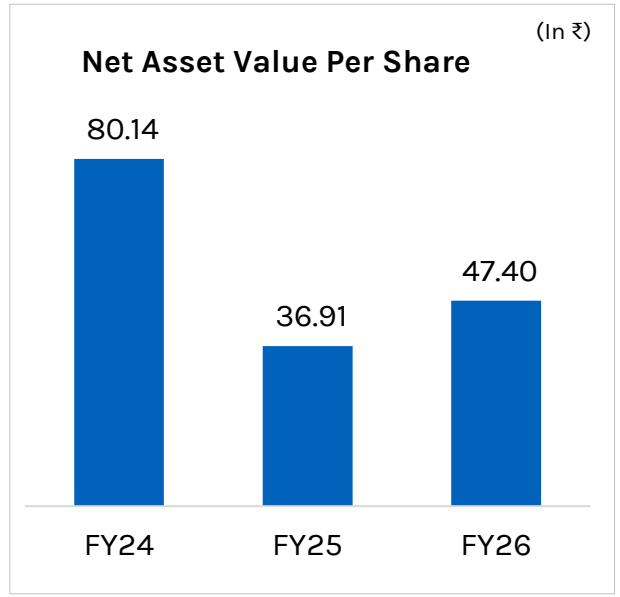






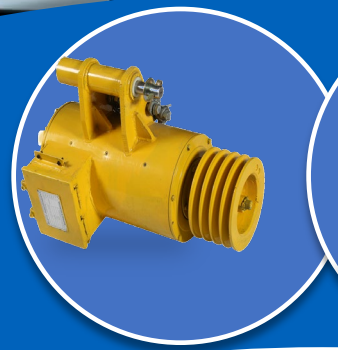






Thank You











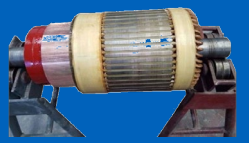












Trust & Technology Delivered

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