

August 13, 2024

To,
**Listing Compliance Department,
National Stock Exchange of India Limited**
Exchange Plaza, Plot no. C/1, G Block,
Bandra Kurla Complex [BKC], Bandra (E),
Mumbai – 400 051, Maharashtra, IN

**Symbol: MACPOWER
Series: EQ
ISIN: INE155Z01011**

Sub: Investor Presentation

Respected sir/ Madam,

With reference to the captioned subject we, Macpower CNC Machines Limited [the “company”] are submitting herewith updated Investor Presentation for all the stakeholders of the company.

Kindly take the same in your record.

Thanking you.

Yours faithfully

For MACPOWER CNC MACHINES LIMITED

**RUPESH MEHTA
MANAGING DIRECTOR
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Encl: a/a



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RAJKOT, GUJARAT. (INDIA)

We Are

MACPOWER **CNC** Machines Limited

Investor Presentation
Q1 FY25



Refer to Disclaimer

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You acknowledge that you will be solely responsible for your own assessment of the market and the market position of the Company and that you will conduct your own analysis and be solely responsible for forming your own view of the potential future performance of the business of the Company.



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Business Overview

Competitive strengths | Key sectors, clientele & range of products

Industry Overview

What are CNC Machines | Market size & opportunity | Competitive advantage

KEY PERFORMANCE HIGHLIGHTS FOR Q1 FY25

62

NOS

High Value Machines sales and order inflows continue to grow

The company has manufactured and sold **62** high value machines during the quarter. Against this the company has received orders for **83** high value machines during the quarter

Machines sold during the quarter

The company has manufactured and sold **262** machines during the quarter, which is the highest ever for the company in Q1.

Against this the company has received orders for **388** machines during the quarter.

262

NOS

2,834

Rs. Mn

Highest ever Unexecuted order book

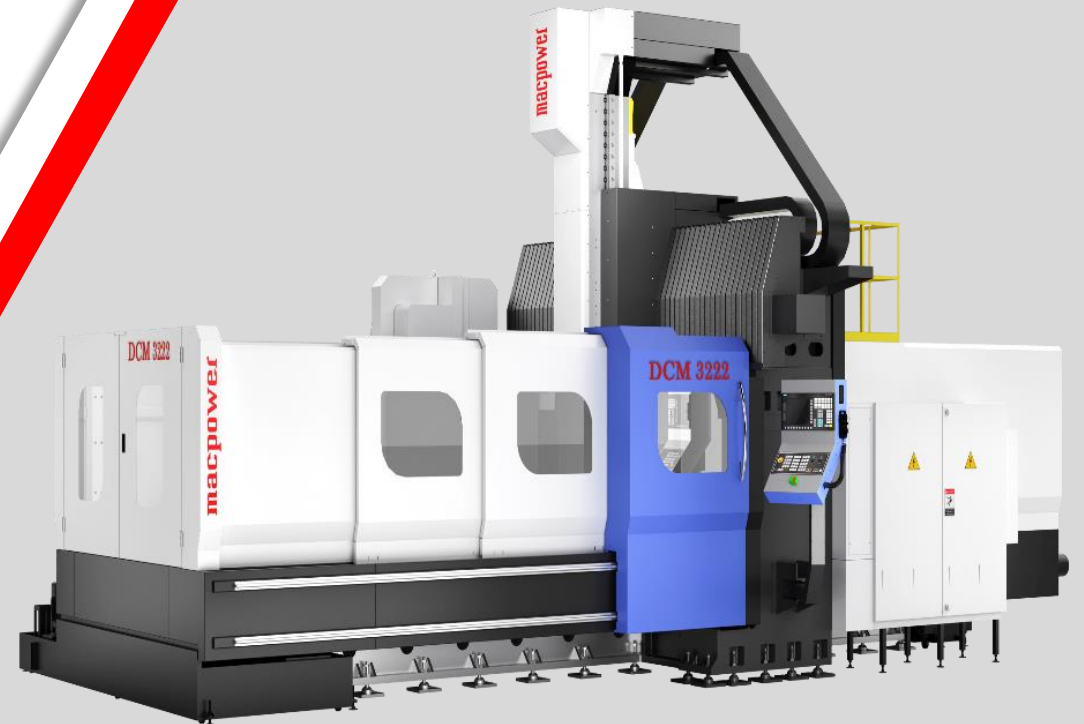
Highest ever unexecuted order book as of June 30, 2024 stood at **Rs 2,834 Mn**

Machine orders under "NEXA" Vertical for premium products see strong traction

As of 30th Jun'24 company has **407** machine order (combined for VMC, HMC, DCM and VTL) as a part of the NEXA vertical for premium products. This constitutes **26%** of order book from premium products in unexecuted order book

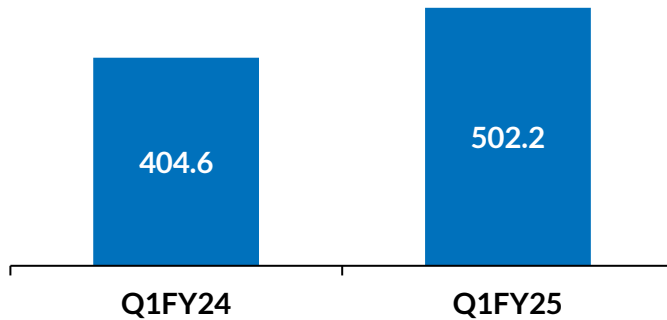
407

NOS



KEY PERFORMANCE HIGHLIGHTS FOR Q1FY25

Revenue (₹ Mn.)



REVENUE

+24% YoY

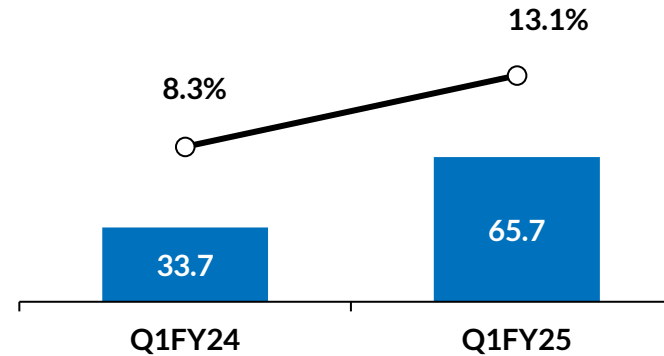
Highest ever revenue for Q1

ORDER BOOK

2,834.13 ₹Mn

Highest ever order book for any quarter

EBITDA (₹ Mn.) & EBITDA Margin (%)



EBITDA

+95% YoY

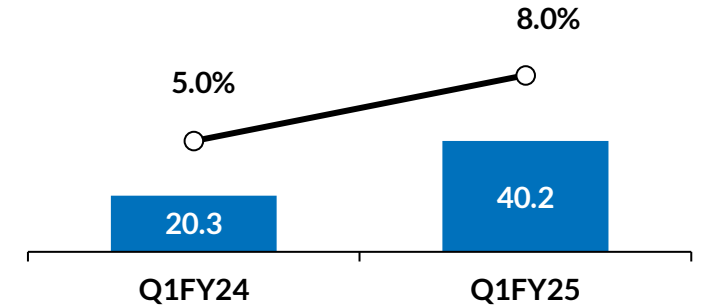
Highest ever EBITDA for Q1

EBITDA Margin

+475 bps YoY

Best ever EBITDA Margin for Q1

PAT (₹ Mn.) & PAT Margin (%)



PROFIT AFTER TAX

+98% YoY

Highest ever PAT for Q1

PAT Margin

+299 bps YoY

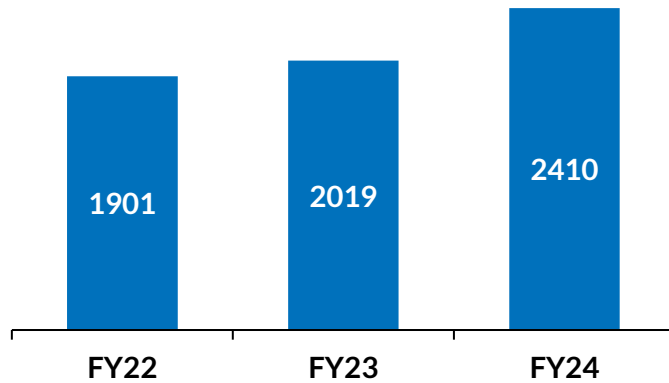
Best ever PAT Margin for Q1

QUARTERLY FINANCIAL PERFORMANCE

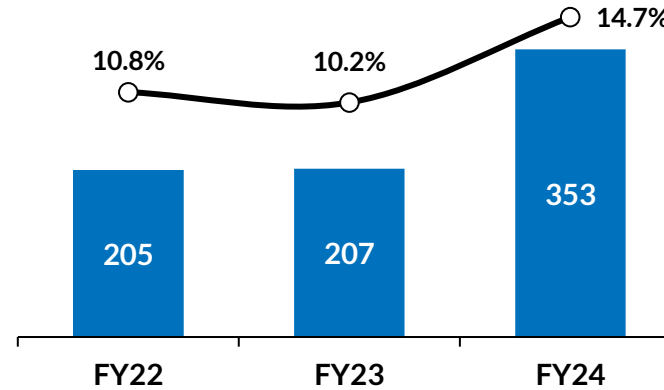
PARTICULARS (INR mn)	Q1FY25	Q4FY24	Q1FY24	YoY%	FY24	FY23	YoY%
Revenue from Operations	502.2	713.4	404.6	24.1	2,410.4	2,018.9	19.4
Total Expenditure	436.5	585.3	370.9	17.7	2,057.1	1,812.2	13.5
EBITDA	65.7	128.1	33.7	95.0	353.3	206.7	70.9
<i>EBITDA Margin (%)</i>	<i>13.08</i>	<i>17.96</i>	<i>8.33</i>	475 bps	<i>14.66</i>	<i>10.24</i>	442 bps
Other Income	2.1	5.4	2.6	- 19.2	15.0	2.6	476.9
Depreciation	13.0	12.0	9.1	42.9	41.3	33.7	22.6
PBIT	54.8	121.5	27.2	101.5	327.0	175.6	86.2
Interest	0.6	0.6	0.4	50.0	2.6	2.3	13.0
PBT	54.2	120.9	26.8	102.2	324.4	173.3	87.2
Tax	14.0	30.8	6.5	115.4	81.9	44.4	84.5
PAT	40.2	90.1	20.3	98.0	242.5	128.9	88.1
<i>PAT Margin (%)</i>	<i>8.00</i>	<i>12.63</i>	<i>5.02</i>	299 bps	<i>10.06</i>	<i>6.38</i>	368 bps
Earnings Per Share (Rs)	4.02	9.01	2.03	98.0	24.24	12.88	88.2

ANNUAL FINANCIAL HIGHLIGHTS & CAPEX

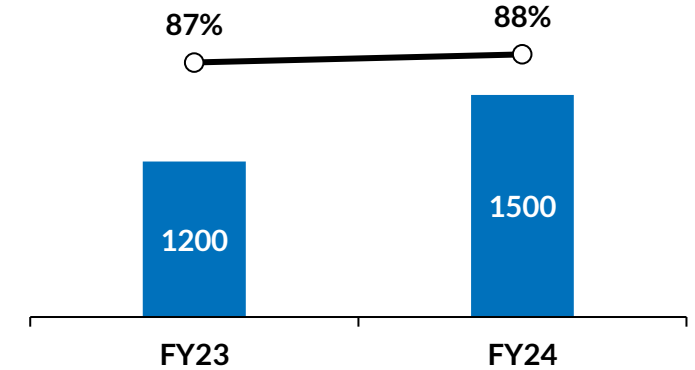
REVENUE (₹ Mn.)



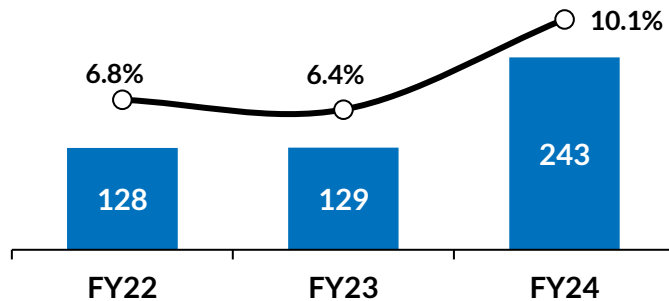
EBITDA (₹ Mn.) & EBITDA MARGIN (%)



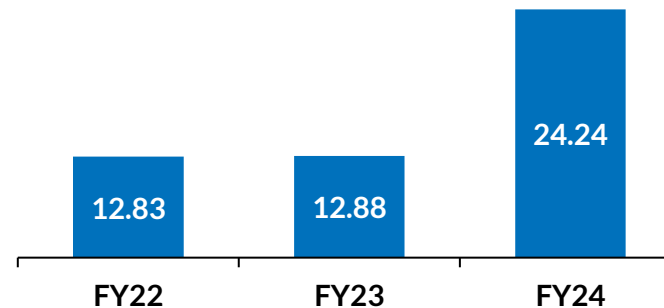
CAPACITY (Nos) & UTILIZATION (%)



PAT (₹ Mn.) & PAT MARGIN (%)



EPS (₹)



CAPEX

₹ 5.46 Cr
FY23

₹ 9.16 Cr
FY24

FY25E



₹ 15-20 Cr

Capex in Construction & Machinery for Backward Integration & increasing Production & Productivity

OUR INCREASING FOCUS ON DEFENCE & AEROSPACE SECTORS



T90 Bhishma
Image sourced from
<https://avn1.co.in/>



ISRO (Chandrayaan-3)
Image sourced from
<https://www.isro.gov.in>



HAL (LCA MK IA)
Image sourced from
<https://www.hal-india.co.in/>

200+ Machines supplied to 35 Factories of Defence

- Supplied to 35 Defence Factories
- Including DRDO & Ordnance factories

100+ Machines supplied to 6 Factories for Aviation

- Supplied to 6 factories in Aviation and Aerospace
- Including HAL & ISRO

Machine for T90 Battle Tank parts

- HMC supplied to Engine Factory AVADI for T90-BHISM Battle Tank Engine parts.
- Proven and approved solution awarded by Finance Minister

Participating with Defence

- DRDO-Brahmos Project
- ISRO-Chandrayan 3 Project
- Heavy Vehicle Factory
- T90 Tank Modernization Project
- BSF-MMG Gun Manufacturers

MOU for Defence & Aerospace

- MoU for Rs. 100 Cr. at "The Tenth Vibrant Gujarat Summit 2024" for New Facility for CNC Machines

Bids for Rs. 340 Crore

- Bids for **Rs. 340 Cr** submitted which are under evaluation for Defence and Aerospace Sector

Mr. Rupesh Mehta, CMD

Management Commentary

“We have started this year with a strong order and have continued to build on it in Q1FY25. Our order book as on 30th June stands at Rs 283 crore, which is nearly 8% higher than our order book as of end of FY24. On a typical execution cycle of four to six months, this provides us reasonable growth visibility for the rest of the year.

Its further heartening to see that our premium products, which forms a part of the NEXA vertical as of today contributes to 26% of our order book.

We have been able to sustain our gross margins and EBITDA margins for the quarter led by our internal efficiencies and low cost manufacturing operations.

We are continuing to witness significant traction from aerospace and defence sectors which augurs well for near to medium term margin improvement

We continue to focus on Sustainable and Profitable Growth.

We have debottlenecked from 1500 machines per annum now to 2000 machines per annum.

We continue to plan for our next leg of growth, which will allow us to achieve our targeted above industry standard CAGR over the next 5 years.

Manpower management, Material management, Resources management and New Products developments (read: import substitution) continue to be our mantra for growth as we aim to achieve 25% Revenue CAGR over the next 3 years.”



ORDER BOOK BREAK UP (As on 30th Jun, 2024)

ORDER BOOK	As on Q1FY25	
Description	No. of Units	Value (₹ Mn)
Opening order book (31.03.24)	1,416	2,623.78
Private orders received	385	680.40
Private orders executed	259	464.28
Govt. Order Received	3	21.53
Govt. Orders Executed	3	27.30
Unexecuted Order Book (30.06.24)	1,542	2,834.13
Tenders & Bids Submitted		
Domestic	3,364	5,097.35
Tender	304	3,398.24
Total Bids Submitted	3,668	8,495.59

ORDER BOOK DETAILS	Number of Machines (Nos)	Total Value of Orders (₹ Mn)	Advance Received (₹ Mn)
Turning Center	1,129	1,708.83	57.79
VMC	379	917.46	23.52
HMC	1	8.70	0.40
VTL	7	27.34	1.19
DCM	7	61.31	3.27
Automation	2	3.20	0.10
Tender + L1	17	107.30	-
Total Unexecuted Order Book	1,542	2,834.13	86.26
Domestic (Bids Submitted)	3,364	5,097.35	-
Tender (Bids Under Evaluation)	304	3,398.24	-
Total Bids Submitted	3,668	8,495.59	-

Note: All values are excluding Taxes

ANNUAL INCOME STATEMENT

31%

REVENUE CAGR
FY20-24

65%

EBITDA CAGR
FY20-24

73%

PAT CAGR
FY20-24

PARTICULARS (INR Mn)	FY20	FY21	FY22	FY23	FY24
Revenue From Operations	819.8	1,128.7	1,901.2	2,018.9	2,410.4
Total Expenses	771.7	1,036.9	1,696.1	1,812.2	2,057.1
EBITDA	48.1	91.8	205.1	206.7	353.3
EBITDA Margin	8.10%	11.00%	10.79%	10.24%	14.66%
Other Income	5.5	3.5	8.3	2.6	15.0
Finance Cost	3.7	1.7	1.5	2.3	2.6
Depreciation	10.8	26	27.9	33.7	41.3
Profit before Tax	39.1	67.6	183.9	173.3	324.4
Tax	11.8	7.3	55.5	44.4	81.9
Profit after Tax	27.3	60.3	128.4	128.9	242.5
PAT Margin	3.30%	5.30%	6.74%	6.38%	10.06%
Earnings per share (Rs)	2.78	6.03	12.83	12.88	24.24

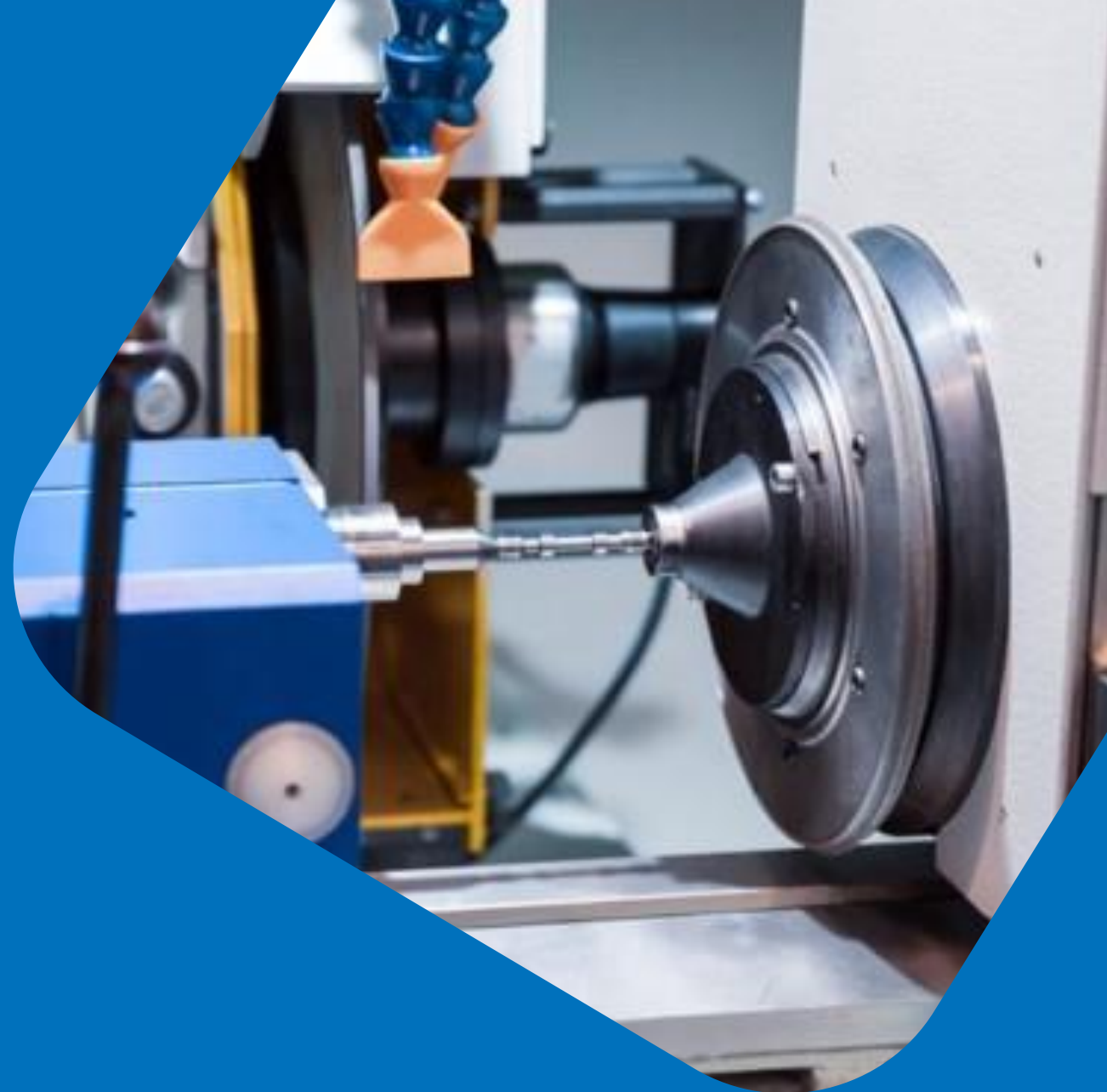
ANNUAL BALANCE SHEET

Equity & Liabilities (INR Mn)	FY23	FY24
Share Capital	100.00	100.00
Reserves & Surplus	866.10	1,091.10
Total Equity	966.10	1,191.10
Long Term Provision	3.50	6.60
Other Long Term Liabilities	3.20	3.50
Deferred Tax Liabilities	19.40	22.90
Non-Current Liabilities	26.10	33.00
Short Term Borrowings	0.20	0.00
Lease Liabilities	0.70	1.30
Trade Payables	281.20	433.00
Other Current Liabilities	98.80	117.70
Short Term Provisions	21.00	9.60
Current Tax Liability	37.10	77.30
Current Liabilities	439.00	638.90
Total Equity & Liabilities	1,431.20	1,863.00

Assets (INR Mn)	FY23	FY24
Fixed Asset	430.30	466.40
Right To Use Asset	3.80	4.40
Work-In-Progress	0.90	27.10
Other Intangible Asset	1.60	0.80
Other Non-Current Asset	5.90	8.10
Non - Current Assets	442.50	506.80
Current Investment	50.00	30.50
Inventories	710.10	904.50
Trade Receivables	127.10	218.00
Cash & Cash Equivalents	51.70	128.60
Short Term Loans and Advances	5.20	65.70
Other Current Assets	44.60	8.90
Current Assets	988.70	1,356.20
Total Assets	1,431.20	1,863.00

WAY FORWARD

Competitive advantage



FUTURE GROWTH DRIVERS

Growing Order Book

Import replacement & growing domestic demand auger well for an order book of Rs. 2,834 Mn

NEXA Group

NEXA group to focus on the sales and marketing of high value machines comprising VTL, HMC, DCM and high end VMC machines with automation

Government Initiatives

Domestic manufacturers to get preference for govt. tenders below Rs 200 cr. PLI scheme and import substitution to drive demand for CNC machines. Industry 4.0 to drive automation and growth in engineering & automation.

MOU Defence

Submission of MOU to the Gujarat Government under the Defence Policy for a project of up to Rs 100 crore to setup a CNC Machine manufacturing facility focused on Aerospace and Defence.

Strategic Partnerships

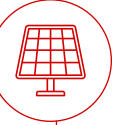
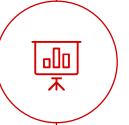
Taking efforts to establish strategic partnerships with global companies for domestic and global markets.

Green Energy Initiatives

Install another 600 KW rooftop solar power plant on new assembly building in FY25, totaling 800 KW which will help in 90% power savings during day time

R&D Centre Bangalore

New R&D center in Bangalore to be operational in Q2FY25



COMPETITIVE ADVANTAGE

Lowest cost producer

Amongst all its peers, Macpower is the lowest cost producer, generating amongst the highest EBITDA and PAT margin in the industry

Best Return Ratios

ROE and ROCE is amongst the highest vis-a-vis peers and displays the working capital efficiency of the company.

High promoter holding

Promoter holding stands at 73.17% as on Jun'24. In the past, promoter has been averse to taking dividend, even as minority shareholders were allotted the dividend

Zero Debt, FCF Positive

Macpower is one of the few net debt negative companies in the sector and has generated positive free cash flow since FY2017-18

High Asset Turnover

Asset turnover for the company currently stands at ~3x and can go up to 5x in the current plant – one of the highest amongst its peers

Widest range of products

With over 27+ different product segments, 315+ models & variants, the company has the widest range of offering amongst peers.



ABOUT US

Corporate Video

[\(click here\)](#)



COMPANY PROFILE

- **Established in 2003**, Macpower CNC Machines Limited is engaged in the manufacture of Computerised Numerically Controlled (CNC) machines.
- It has a CNC Machine **manufacturing unit in an area of around 8 acres** at Metoda G.I.D.C., Rajkot, Gujarat (India).
- **The company listed (IPO) in 2018**. Proceeds of the issue were used to help the company backward integrate into the manufacture of Machining components and enhance production capacity.
- The company is now looking to further **backward integrate, using internal accruals, to develop state of the art patterns** for different machine models which will lead to cost reduction, further quality improvement, productivity and help increase overall production.
- Macpower currently offers the widest range of **27 different series/product segments** namely Turning Center, Twin Spindle Turning Center, VMC, Twin Spindle VMC, Turn Mill Center, HMC, VTL, DTC, Grinder, Pro Turning, Pro Milling, VMC with APC, **315+ variants and models serving 27+ product segments with 10555+ installations** to date
- It has sales and service in **39 cities serviced through 195 qualified engineers and 9 business associates**.
- Total employee strength **850+**
- The company today has a capacity to manufacture **2000 machine per annum**



OUR JOURNEY

1980

Setup

Established as Modern Machine Tools to trade in small machine tools.

1985

Small beginnings

Started manufacturing unit for conventional machines.

2003

CNC Machines

CNC Machine assembly unit setup seeing the growing need for precision and productivity.

Macpower CNC Machines Pvt Ltd was incorporated.

2005

Machining

In house machining capability developed

2007

USP

Developed models with advantages of our own USP

2013

Global launch

Launch of Multi tasking machine in EMO - Germany

OUR JOURNEY

2016

Expansion

Expansion of manufacturing facilities & product categories to meet growing demand

2018

Going Public

Company raises money through IPO for backward integration for growth and margin improvement. **Company listed on NSE SME Emerge Platform**

2020

Backward integration

Company backward integrated (BI) - setup in-house machining facility, sheet metal work and powder coating plant with ability to make & supply 1000-1200 machines pa.

Company migrated to NSE main board platform.

2022

Capacity Enhanced

Enhanced capacity to 1100 machines p.a and started debottlenecking to 1500 machines p.a

2023

Capacity Enhanced

Enhanced capacity to 1500 machines p.a and further expanding to 2000 machines p.a.

2024

Capacity Enhancement & New Tech Centre

Started debottlenecking to 2000 machines p.a and inaugurated Coimbatore Tech Centre & Bangalore office.



Mr. Rupesh Mehta

Promoter, Chairman & Managing Director

Rupesh Mehta has an experience of more than 28 years in the Machine Tool Industry. He holds a degree in Bachelor of Commerce from Saurashtra University. He looks after all the corporate decision and is responsible for the entire business operation of the company.

Major landmarks of his journey:

Executive Director – Indian Machine Tools Manufacturers Association

Former President – Rajkot Machine Tool Association

Former Treasurer – Rajkot Chamber of Commerce

Former Director – Rajkot Engineering Association



Mr. Nikesh Mehta

Promoter, Whole-Time Director & CEO

Nikesh Mehta has an experience of around 17 years in the Machine Tool Industry. Nikesh Mehta holds a degree in Bachelors of Commerce from Saurashtra University.

Presently looking after Sales & Service related activities to streamline them to grow market share of company in machine tool industry.

Earlier His scope of work included looking after the Machine Shop, Application Department, Purchase department & Production related activities of the company

OUR NETWORK

6 Branch Offices

4 Tech Centers

39 Destinations

9 Business Associates

850+ Employees

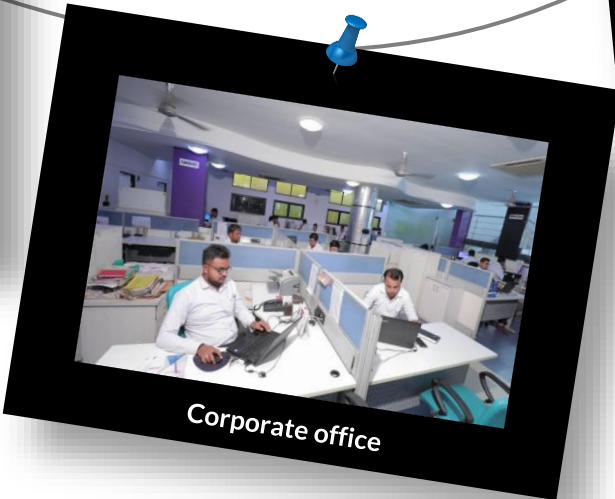
195 Sales & Service
Qualified Engineers



INFRASTRUCTURE



Head Office & Plant



Corporate office



R&D Centre



Manufacturing plant

TECH CENTRES



Ahmedabad Tech Centre



Coimbatore Tech Centre



Mohali Tech Centre



Jamnagar Tech Centre

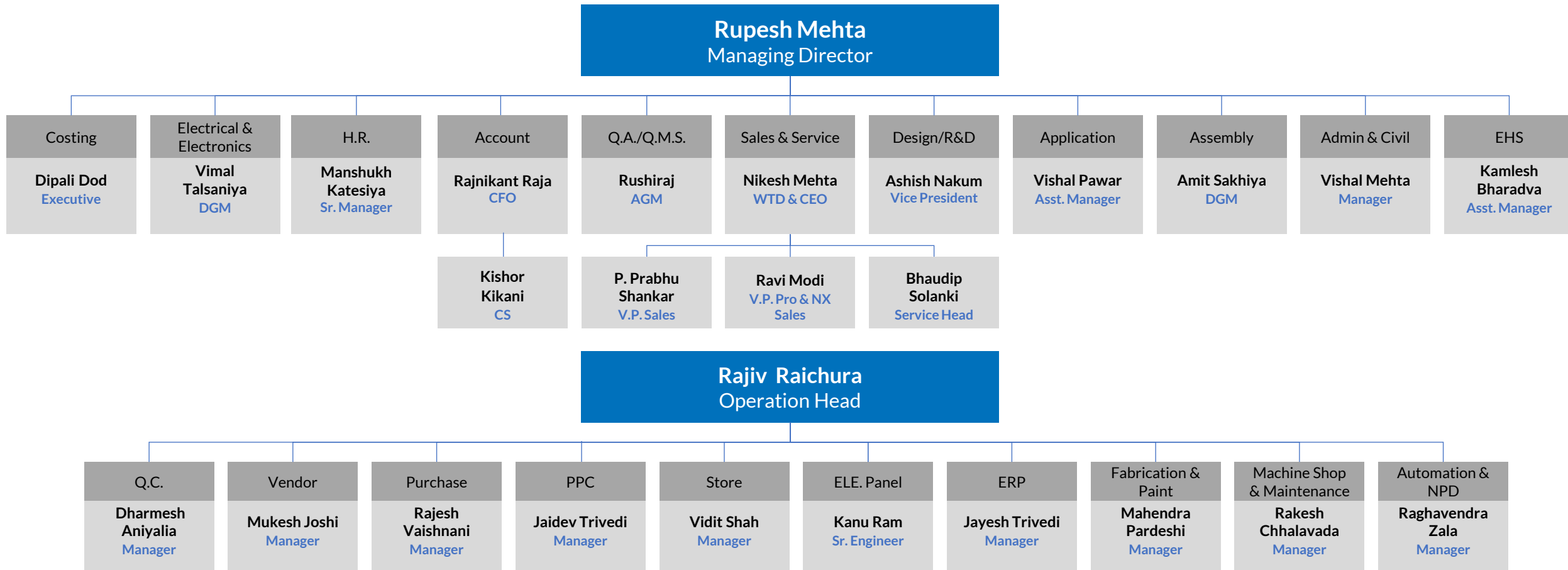
Upcoming Tech Centers

- Faridabad
- Pune
- Chennai
- Bangalore
- Shapar, Rajkot

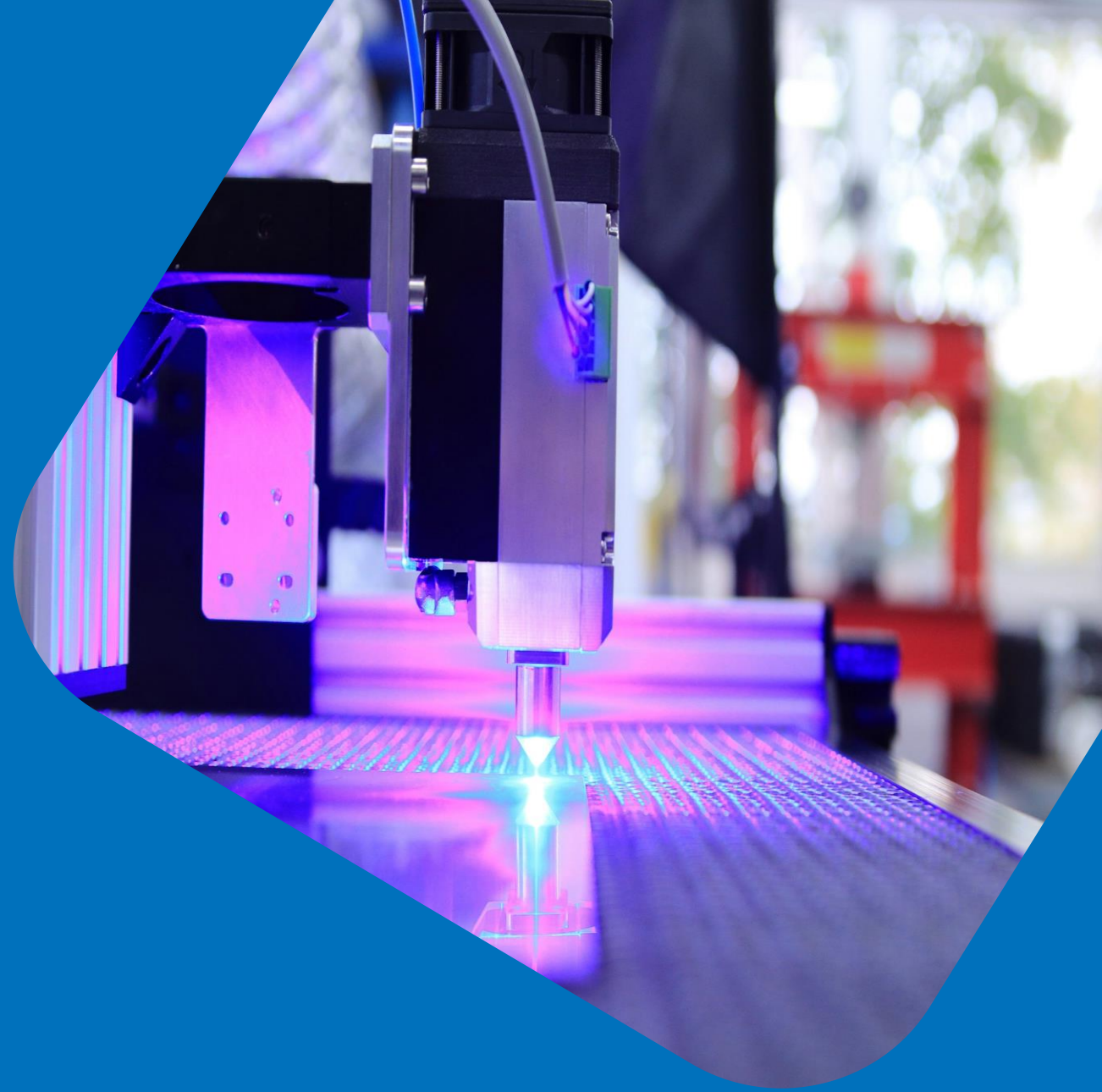
Upcoming R&D Office

- Bangalore

ORGANISATION STRUCTURE



Business Overview



WIDEST RANGE OF PRODUCTS

10555+ installations to date.

27

Industry Segments Serviced

315+

Product Variants & Models

3000+

Application Solutions

27+

Product Segments



KEY PRODUCTS AT A GLANCE (1/2)

Turning Centre



In today's competitive market, you need robust CNC turning centers with uncompromised performance and specifications to produce world class products quickly, accurately and with minimum non productive time.

Vertical Machining Centre



Our new generation Vertical Machining Centers incorporate a wide range of enhancements and sophisticated engineering knowledge that enables us to deliver optimized solutions with optimal performance

Horizontal Machining Centre



The rush in requirement for high technological products has provided a great chance for the development of Horizontal Machining Centers. We have developed different sizes to meet the rising demand for machines delivering higher outputs

Twin Spindle - VMC



"Double the production for similar job". Simultaneous machining on two spindles enhances efficiency and lowers the cost per part for high-volume production. It enhances throughput, reduced energy consumption and maximized floor space.

KEY PRODUCTS AT A GLANCE (2/2)

Twin Spindle - Turning



In demanding times of machining accuracy and productivity, Macpower has addressed both the issues, reducing idle time resulting in cumulative productivity with lesser manpower offering customers gain higher margins.

Vertical Turret Lathe



Combination of high power performance and excellent unyielding construction, designed to operate in medium and high production environments. It is equipped with robust structure design to ensure rigidity, stability, accuracy and flexibility for the machining of chucking parts.

Drill Tap Centre



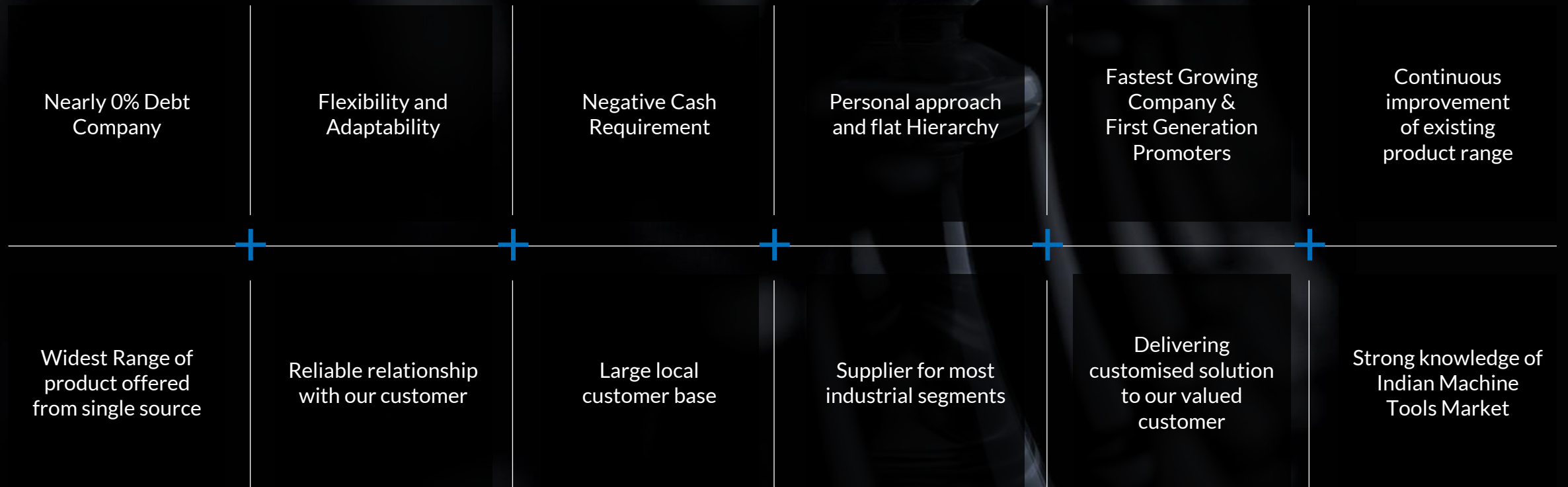
Designed specifically for drill tap application along with total tapping milling capabilities. These machines are compact and powerful, built with optimally designed structure to take care of cutting forces and are equipped with automatic tool changers.

Double Column Machine



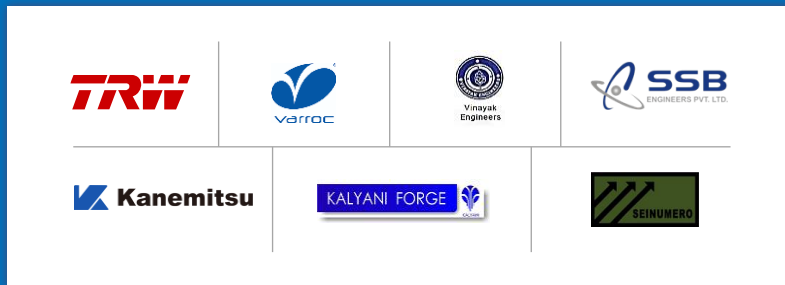
In today's competitive market, you need robust Double column machine with uncompromised performance and specifications to produce world class products quickly accurately and with minimum nonproductive time

COMPETITIVE STRENGTHS



USER INDUSTRY & CLIENTELE AT A GLANCE

Auto / Auto Ancs



and 1250 more

Defence / Aerospace



and 54 more

Engineering / Capital Goods



and 775 more

Government: PSUs & Education Sector



and 22 more

Die Mould Sector



and 157 more

Agriculture



and 87 more

OUR ESG EFFORTS



Environment

Existing 200 KW Installed roof top solar plants at factory and will also install another 600 KW rooftop solar power plant on new assembly building in FY25, totaling 800 KW which will help in 90% power savings during day time.

Zero Liquid discharge facility



Social

Meal is provided to all plant employees, everyday.

Spent Rs. 1.12 lakhs towards Promoting Education regarding cyber security

Spent Rs. 27.50 lakhs towards Promoting Education & Health Care



Governance

Well diversified Board of Directors with 6 number of directors out of 3 being independent directors

Promoters have strong techno commercial understanding of the business – ably supported by the Board of Directors for future growth and shareholder value creation

Robust internal control and checks through well defined systems and processes to ensure highest standards of reporting for our clients

Independent Director Chairs the Nomination & Remuneration Committee; Audit Committee as well at Stakeholder Relations Committee.

CNC Machines

Industry, Sector and Macpower



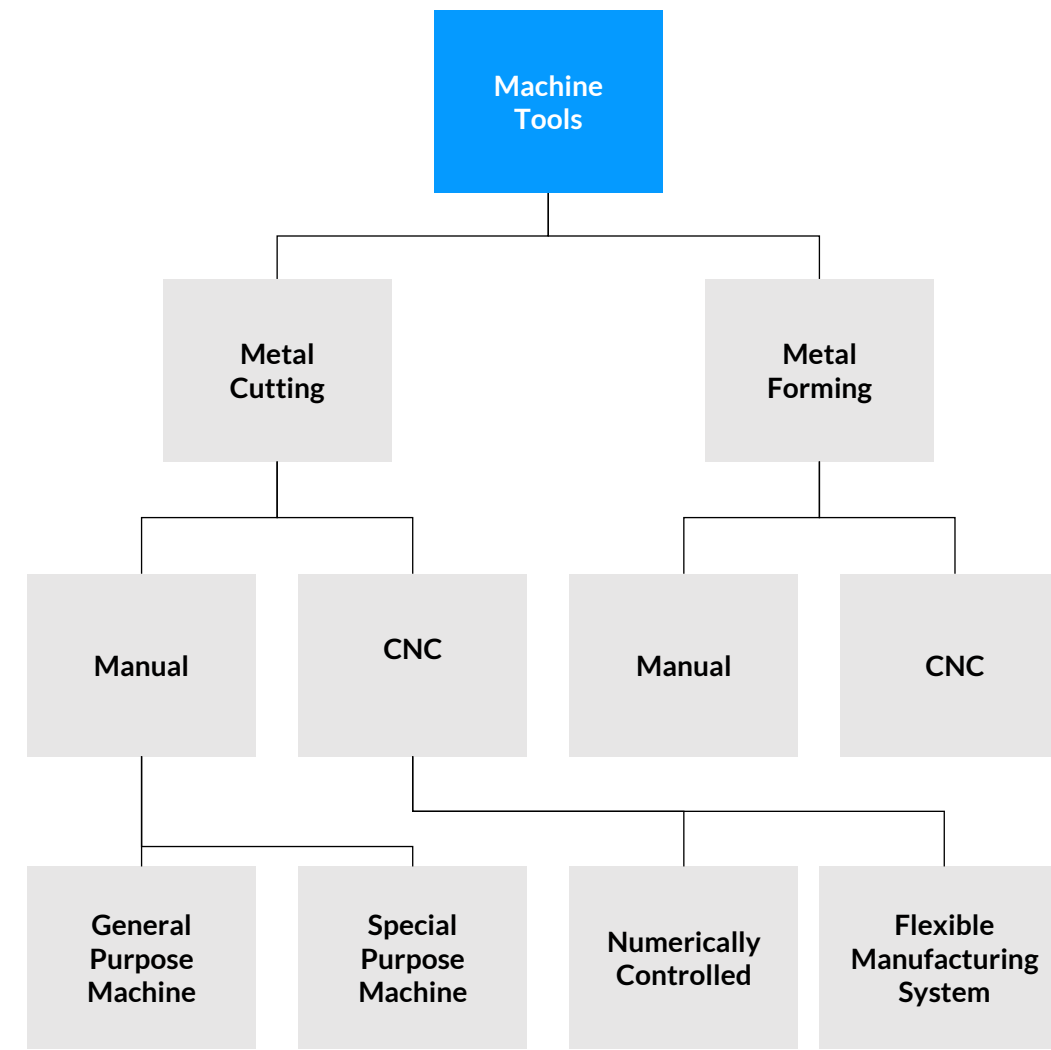
CNC Machines?

What are CNC Machines? (CNC machine in use – [video1](#) [video2](#) (click on link))

- Computer Numerical Control (CNC) is a machine in which pre-programmed software are used, combined with Engineering Designing to achieve desired cuts (shapes) based on end use of the product shaped.
- The manufacturing process using CNC machines is used to control a range of complex machinery and to perform three dimensional cutting tasks.
- The desired cuts (shapes) are programmed into the software and dictated to corresponding tools and machinery inside the CNC machine, which then carry out the tasks to be performed.

Industry 4.0

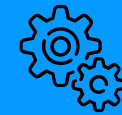
- Industry 4.0 aimed at use of cloud and internet in manufacturing.
- Enhanced human-machine interaction with advanced robotics, increased connectivity and data sets.
- Aimed at making India a global hub in manufacturing, design and innovation.
- To augment share of manufacturing in the GDP from 17% to 25%
- Domestic machine tool manufacturing needs to be increased 5x from current levels to aid the increasing share of manufacturing in the GDP.



Market Size & Opportunity

- India occupies 9 rank in production and 7 rank in consumption globally, as per the latest 'World Machine Tool Survey 2022' by Gardner Intelligence.
- The Indian machine tool industry improved its ranking by two spots in the global machine tool producing nations list compared to its ranking in 2021
- Consumption (demand) of machine tools in India has grown from approx Rs 12,000 cr in FY17 to approx. Rs 24,000 cr in FY23.
- Against this domestic production (supply) has grown from approx. **Rs 7,000 cr to approx. 12,000 cr** during the same period.
- Domestic production accounts for around 40-50% of total consumption, thereby having significant dependence on imports.
- Government initiatives of "Make in India" and "China+1" is driving the change in the manufacturing landscape in India, ultimately leading to sharp growth in demand for CNC Machines.
- If the government target to increase share of manufacturing to GDP from 17% to 25% was to be achieved, the machine tool manufacturing industry in India **will have to move from the current ~Rs.12,000 cr to ~Rs.45,000-50,000 cr** over the next decade.
- We envisage tremendous growth in the machine tool demand due to rise in domestic manufacturing and towards import substitution.
- The India machine tools market is expected to reach US\$ 3.2 Billion by 2032, exhibiting a growth rate (CAGR) of 8.2% during 2024-2032.

Source: <https://www.imarcgroup.com/india-machine-tools-market>



Domestic manufacturer profile for machines & machine tools

33%
Organized

67%
Unorganized

75%
ISO Certified

25%
Non-Certified



Growth in market for machine tools vs growth in manufacturing share to GDP

Manufacturing to GDP Target
17% → 25%

Domestic Manufacturers
40-50% → 60%

Imports
50-60% → 40%

Domestic Machine & Tools
supply will need to grow from -
~Rs 12,000 cr → ~Rs 45,000 cr

AWARDS & ACHIEVEMENTS

MSE-1 certification for highest financial strength and operational ability by CRISIL

FIE Foundation Award at IMTEX 2017 for Twin Spindle VMC V855 Twin Head

FIE Foundation Award at IMTEX 2015 for Multi Tasking Machine Turn O' Mill Y S

FIE Foundation Award at IMTEX 2013, Bangalore for designing excellence for model TURN 'O' MILL 200

4th Ranked in highest excise tax pay in the year 2010 -11

Best Product Award for LX 200 Super at Engineering Expo in 2004





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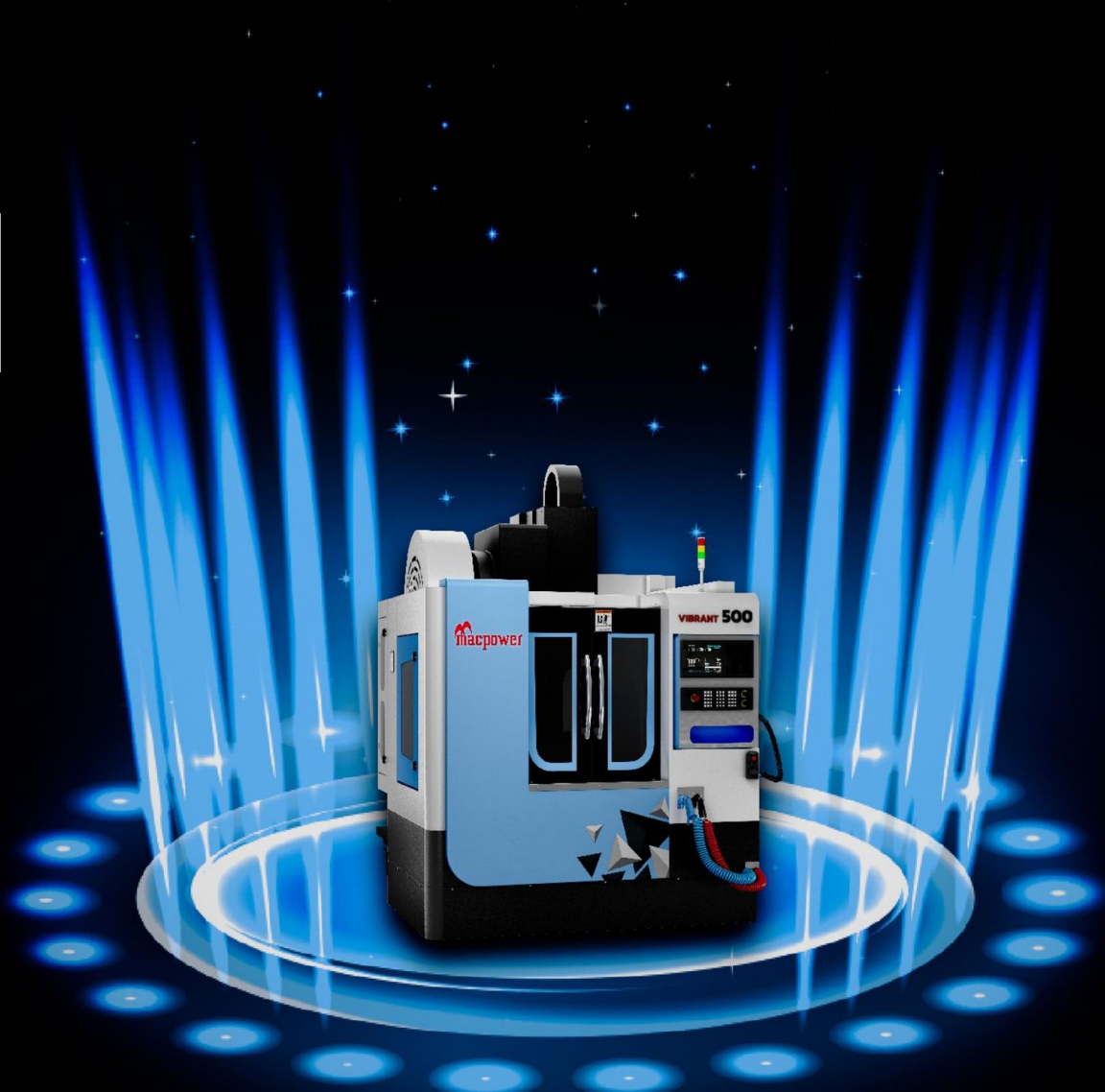
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THANK YOU !