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ADITYA ULTRA STEEL LIMITED
The Corporate Identification Number of our Company is U27100G2011PLC066552

PROMOTERS OF OUR COMPANY: SUNNY SUNIL SINGHI, VARUN MANOJKUMAR JAIN AND VARUNA JAIN
The issue is being made in accordance with Chapter IX of the SEBI ICDR Regulations (IPO of Small and Medium Enterprises) and the equity shares are proposed to be listed on Emerge platform of ("National Stock Exchange of India Limited") (NSE Emerge).

INITIAL PUBLIC OFFER OF 74,00,000 EQUITY SHARES OF FACE VALUE OF ₹ 10 EACH (THE "EQUITY SHARES" OF ADITYA ULTRA STEEL LIMITED ("OUR COMPANY" OR "THE ISSUER"), AT AN ISSUE PRICE OF ₹ 14 PER EQUITY SHARE (INCLUDING SHARE PREMIUM OF ₹ 4 PER EQUITY SHARE) FOR CASH, AGGREGATING UP TO ₹ 1,03,60,00,000 ("PUBLIC ISSUE") OUT OF WHICH 3,76,800 EQUITY SHARES OF FACE VALUE OF ₹ 10 EACH AT AN ISSUE PRICE OF ₹ 14 PER EQUITY SHARE FOR CASH, AGGREGATING UP TO ₹ 5,27,52,00,000 ("MARKET MAKER RESERVATION PORTION").

RISK TO INVESTORS:
RETAIL PORTION: NOT MORE THAN 50.00% OF THE NET ISSUE;
NON-INSTITUTIONAL PORTION: NOT LESS THAN 15.00% OF THE NET ISSUE;
MARKET MAKER PORTION: 3,76,800 EQUITY SHARES OR 5.00% OF THE ISSUE;
FLOOR PRICE IS 5.0 TIMES OF THE FACE VALUE AND THE CAP PRICE IS 8.20 TIMES OF THE FACE VALUE OF THE EQUITY SHARES.

BASIS OF ISSUE PRICE:
The Issue Price has been determined by the Company in the light of the key business strengths of the company. The floor price of the Equity Shares is ₹ 10/- and Issue Floor Price is ₹ 9.99/- which is 5.0 times of the face value and Issue Cap Price is ₹ 82/- which is 8.20 times of the face value.

Table with 2 columns: Sr. No., As at. Rows include dates from March 2022 to March 2024, showing NAV and Revenue from Operations.

Table with 2 columns: Sr. No., Period. Rows show financial metrics like EPS, P/E, RDNW, and Weights for various periods.

Table with 2 columns: Sr. No., Particulars. Rows list application dates and corresponding EPS, P/E, and RDNW values.

Table with 2 columns: Sr. No., Period. Rows show RDNW and Weights for different periods.

Investors should read the above-mentioned information along with section titled "Our Business", "Risk Factors" and "Revised Financial Statement" including profit and loss, and other financial information of the Red Herring Prospectus. For further details, please refer to the Red Herring Prospectus.

ANCHOR INVESTOR BID/ISSUE PROGRAM OPENS ON: FRIDAY, 06TH SEPTEMBER, 2024.
BID/ISSUE OPENS ON: MONDAY, 09TH SEPTEMBER, 2024, CLOSE ON: WEDNESDAY, 11TH SEPTEMBER, 2024.

Table with 2 columns: Bid Opening Date, Bid Closing Date (T+1 Day), Finalization of bids of allotment with the Designated Stock Exchange/Allotment of Securities (T+3 Day).

CONTENTS OF MEMORANDUM OF ASSOCIATION OF THE COMPANY AS REGARDS SUBJECTS: For information on the main objects and other objects of our company, see "Our History and certain other Corporate Matters" of the Red Herring Prospectus and Clause 1 of the Memorandum of Association of our company. The Memorandum of Association of our company is a material document for inspection in relation to this issue. For further details, see the Section "Material Contracts and Documents for Inspection" of the Red Herring Prospectus.

DISCLAIMER CLAUSE OF SECURITIES AND EXCHANGE BOARD OF INDIA (SEBI): Since the issue is being made in terms of Chapter IX of the SEBI (ICDR) Regulations, 2018, the Red Herring Prospectus has been filed with SEBI. However SEBI shall not issue any observation on the Draft Red Herring Prospectus / Red Herring Prospectus or Prospectus. Hence there is no such specified disclaimer clause of SEBI. However investors may refer to the "Disclaimer Clause of SEBI" of the Red Herring Prospectus.

RISK TO INVESTORS: Investment in equity and equity-related securities involve a degree of risk and investors should not invest any fund in this issue unless they can afford to take the risk of losing their investment. Investors are advised to read the risk factors carefully before taking an investment decision in this issue. For taking an investment decision, investors must rely on their own assessment of the Company and the issue including the risk involved. The Equity Shares offered in the issue have neither been recommended nor approved by Securities and Exchange Board of India nor does Securities and Exchange Board of India guarantee the accuracy or adequacy of the information or the issue price of the Equity Shares. Investors are advised to read the Section titled "Risk Factors" of the Red Herring Prospectus.

DEBENTURE TRUSTEE: As this is an issue of Equity Shares, the appointment of Trustee is not required.

UPI GRADING: Since the issue is being made in terms of Chapter IX of the SEBI (ICDR) Regulations, 2018, there is no requirement of appointing an IPO Grading agency.

ASBA: Simple, Safe, Smart way to application - Make use of it. Application Supported by Blocked Amount (ASBA) is better way of applying to issue by simple blocking the fund in the bank account, investors can avail the same. For details, check section on ASBA below. Mandatory in public issue No Cheque/ demand draft will be accepted.

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BOOK RUNNING LEAD MANAGER TO THE ISSUE: swastika INVESTMENT LIMITED. REGISTRAR TO THE ISSUE: Camco Corporate Services Limited. COMPANY SECRETARY AND COMPLIANCE OFFICER: Vikas Babushkin Penwar.

swastika INVESTMENT LIMITED. Camco Corporate Services Limited. Vikas Babushkin Penwar: Company Secretary and Compliance Officer.

AVAILABLE LISTED BID/CHEQUE APPLICATION FORMS: Bid-cum Application Form can be obtained from the Company i.e. Aditya Ultra Steel Limited, the Book Running Lead Manager i.e. Swastika Investment Limited, the Registrar to the Issue i.e. Camco Corporate Services Limited. The application forms can also be downloaded from the website of National Stock Exchange of India Limited (www.nseindia.com), Application supported by Blocked Amount (ASBA) form can be downloaded from the website of National Stock Exchange of India Limited (www.nseindia.com).

APPLICATOR SUPPORTED BY BLOCKED AMOUNT (ASBA): All investors in this issue may apply through ASBA. ASBA can be availed by all the investors except Anchor Investors. All potential investors are mandatorily required to participate in the issue through an Application Supported by Blocked Amount (ASBA) process. The Limited is www.nseindia.com. For more details on the ASBA process, please refer to the details given in Application Form, and ASBA prospectus and also please refer to the Section "Issue Procedure" of the Red Herring Prospectus.

BANKER TO THE ISSUE AND SPONSOR BANK: AXIS BANK LIMITED. (SEBI Reg. No.: INR0000011). Address: Bhamburda Circle, Bhamburda, Ahmedabad, Gujarat. Website: www.axisbank.com.

ADITYA ULTRA STEEL LIMITED is proposing, subject to market conditions and other considerations, a public issue of its Equity Shares and has filed the Red Herring Prospectus with the Registrar of Companies, Ahmedabad ("ROC"). The Red Herring Prospectus is available on the website of the SEBI at (www.sebi.gov.in), the website of the Book Running Lead Manager (www.swastika.com), and website of the Company at (www.aditya-ultra-steel.com).