



JSW Steel Limited Investor presentation

February, 2020

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**JSW Group and
company
overview**

Key highlights

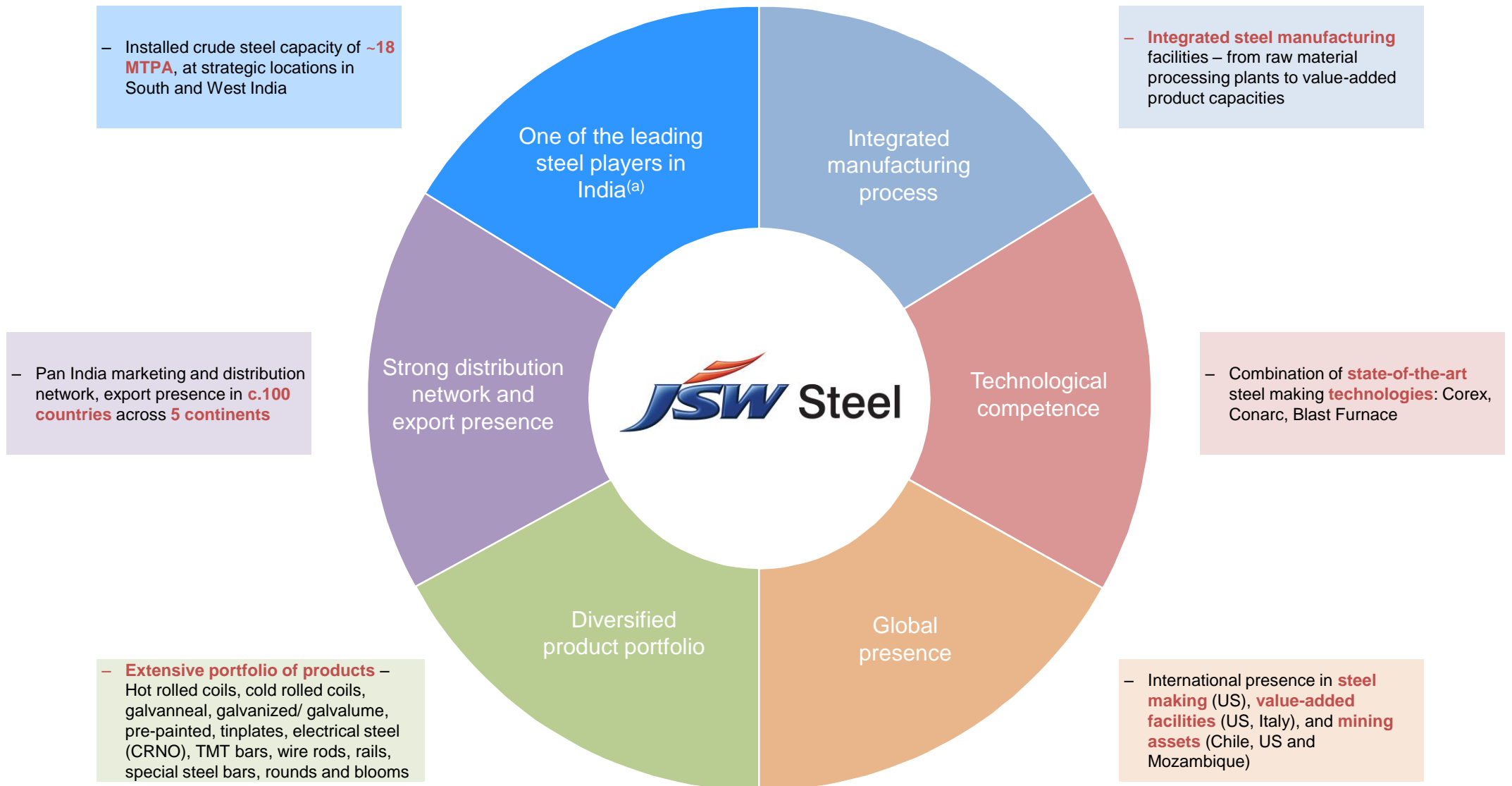
Appendix

JSW Group – overview



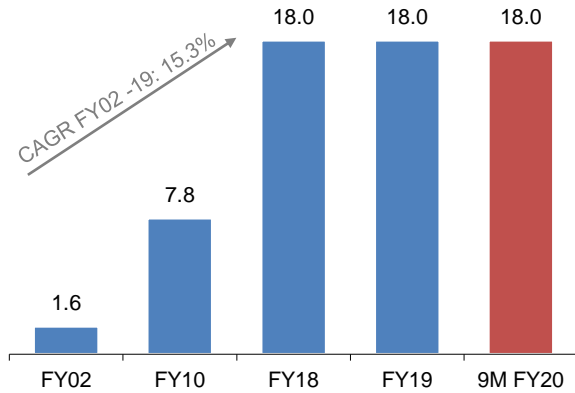
Presence across the core sectors

JSW Steel – among India’s leading steel manufacturers

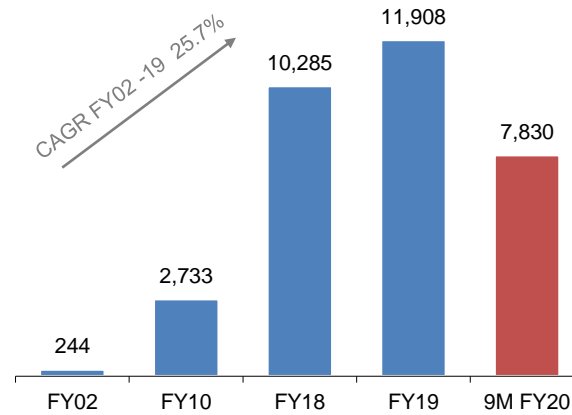


Transformational journey to market leadership

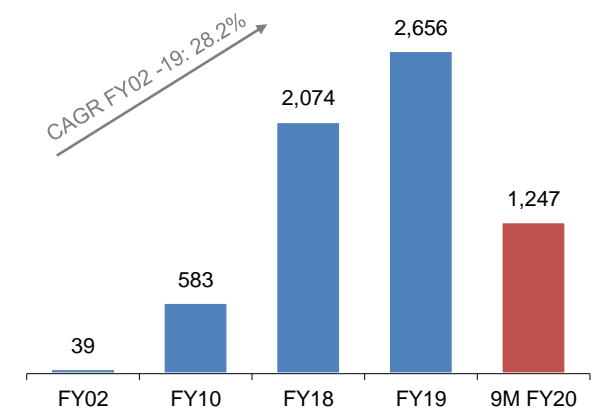
Capacity (MTPA)



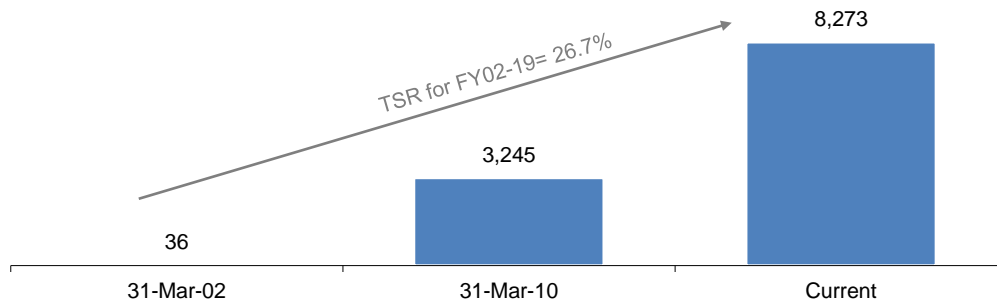
Total revenue (US\$m)^(a)



EBITDA (US\$m)



Market cap (US\$m)^(b)



	FY02	FY10	FY19	
Technology	Corex	Corex, BF	Corex, BF, Conarc	• Adopting industry leading technologies
Product mix	Flats	Flats, long, special steel and value added	Flat, long, special steel, value added, AHSS for automotive, electrical steel, colour coated steel, Tin plate	• Continuously expanding product canvas with focus on high-end value-added products

Value accretive growth through the economic cycles



Key highlights

**JSW Group and
company
overview**

Appendix

Key highlights



1

One of the leading domestic steel players and well placed to benefit through the cycle

2

Strong business profile diversified by region, markets and products

3

Strong focus on operational efficiency with best-in-class conversion costs

4

Robust financial profile and stable cash flows

5

Prudent leverage management

6

Proven track record of growth through organic and inorganic expansions

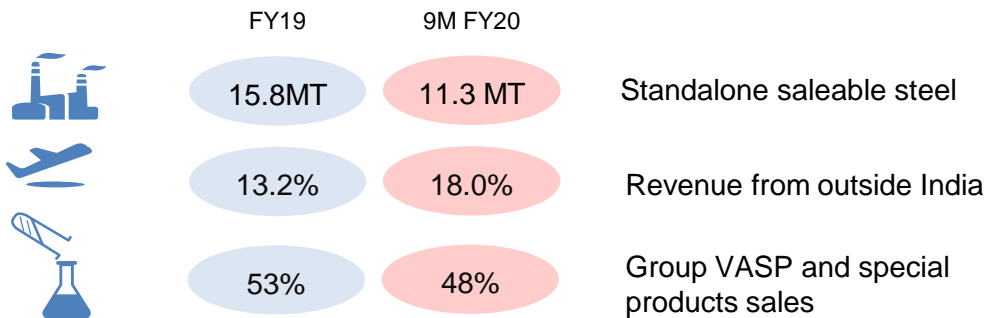
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Experienced management with strong parentage

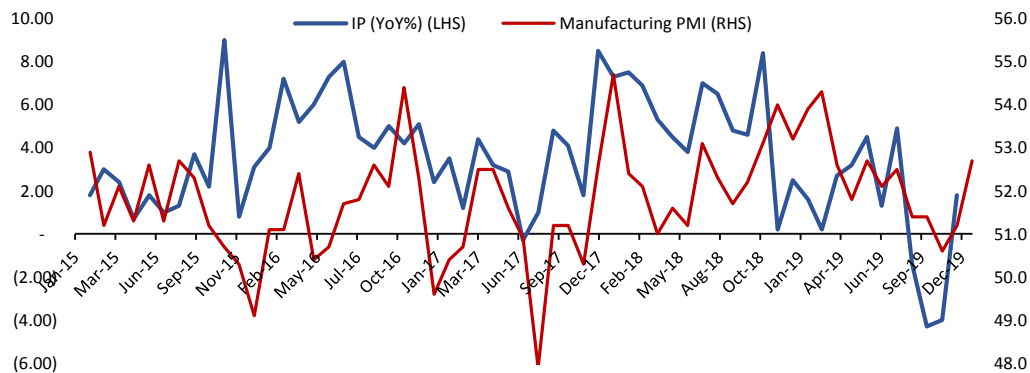
1

One of the leading domestic steel players and well placed to benefit through the cycle

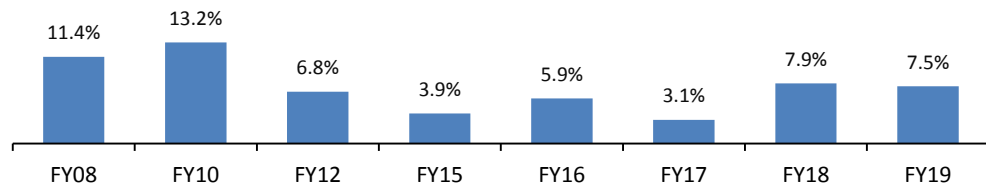
JSW Steel is a leading player in India



India's IIP and PMI trend



India apparent steel consumption expected to grow significantly



Source: IBEF, Joint Plant Committee

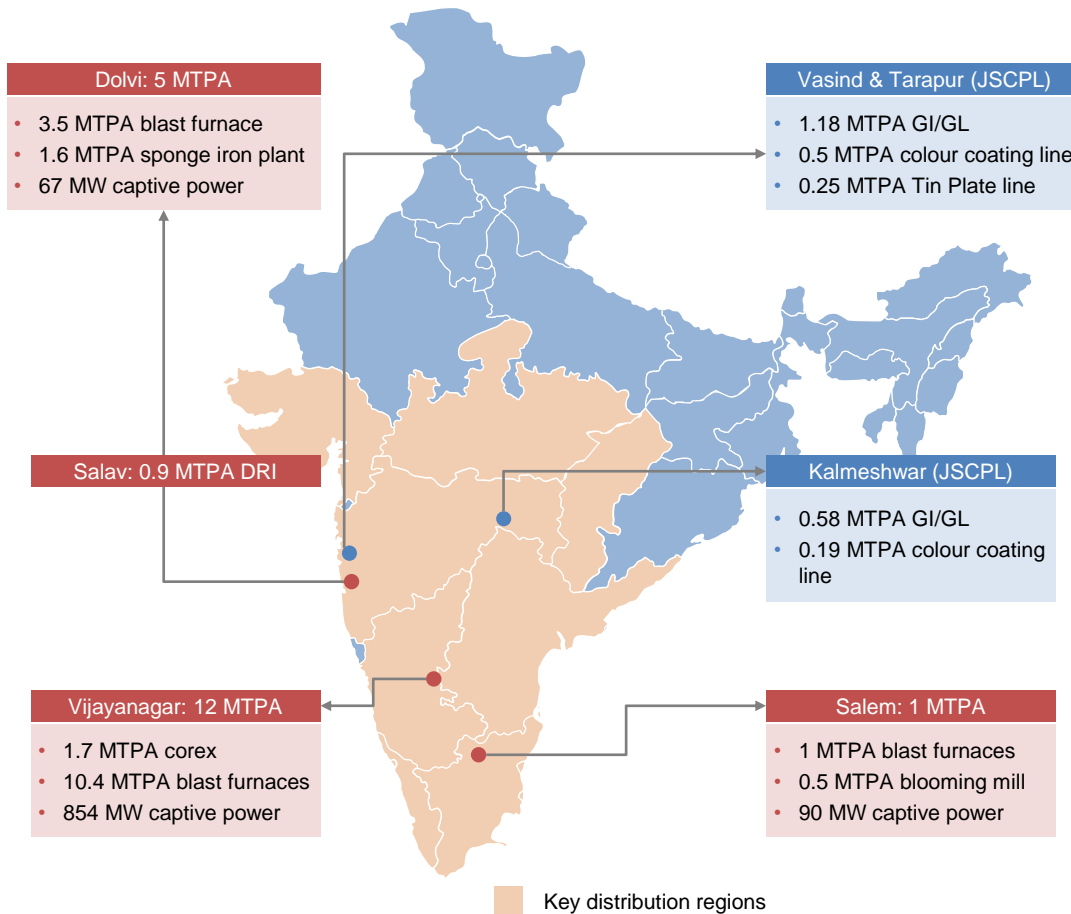
Global steel markets

- Indian market**
 - US\$1.4tn spend plan on National Infrastructure Pipeline (NIP) over the next 5 years is likely to revive growth in the Gross Fixed Capital Formation (GFCF) cycle.
 - National Steel Policy envisages crude steel capacity of 300MT by 2031
 - Current low per capita steel consumption (<73 kg per annum)
- China**
 - Accounts for c.50% of global steel production
 - Stable growth outlook in China as policy makers respond with appropriate fiscal and monetary measures
- Global market**
 - Europe**
 - Ease of trade conflicts, political stability and policy stance to anchor Euro area's growth trajectory
 - US**
 - Tight labor markets and strong consumer sentiments underpins the US growth outlook

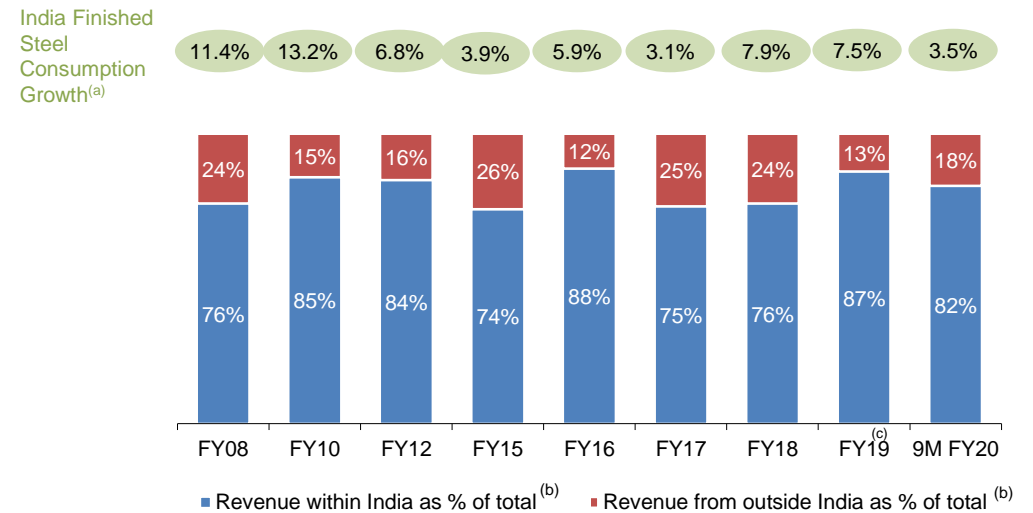
- Well placed to benefit from the strong domestic fundamentals
- Lower cost from commencement of captive iron ore mines and improved availability
- Stable margins through the cycle

2 Strong business profile diversified by region, markets and products

Geographically diversified with manufacturing facilities in South and West India along with strategic overseas presence



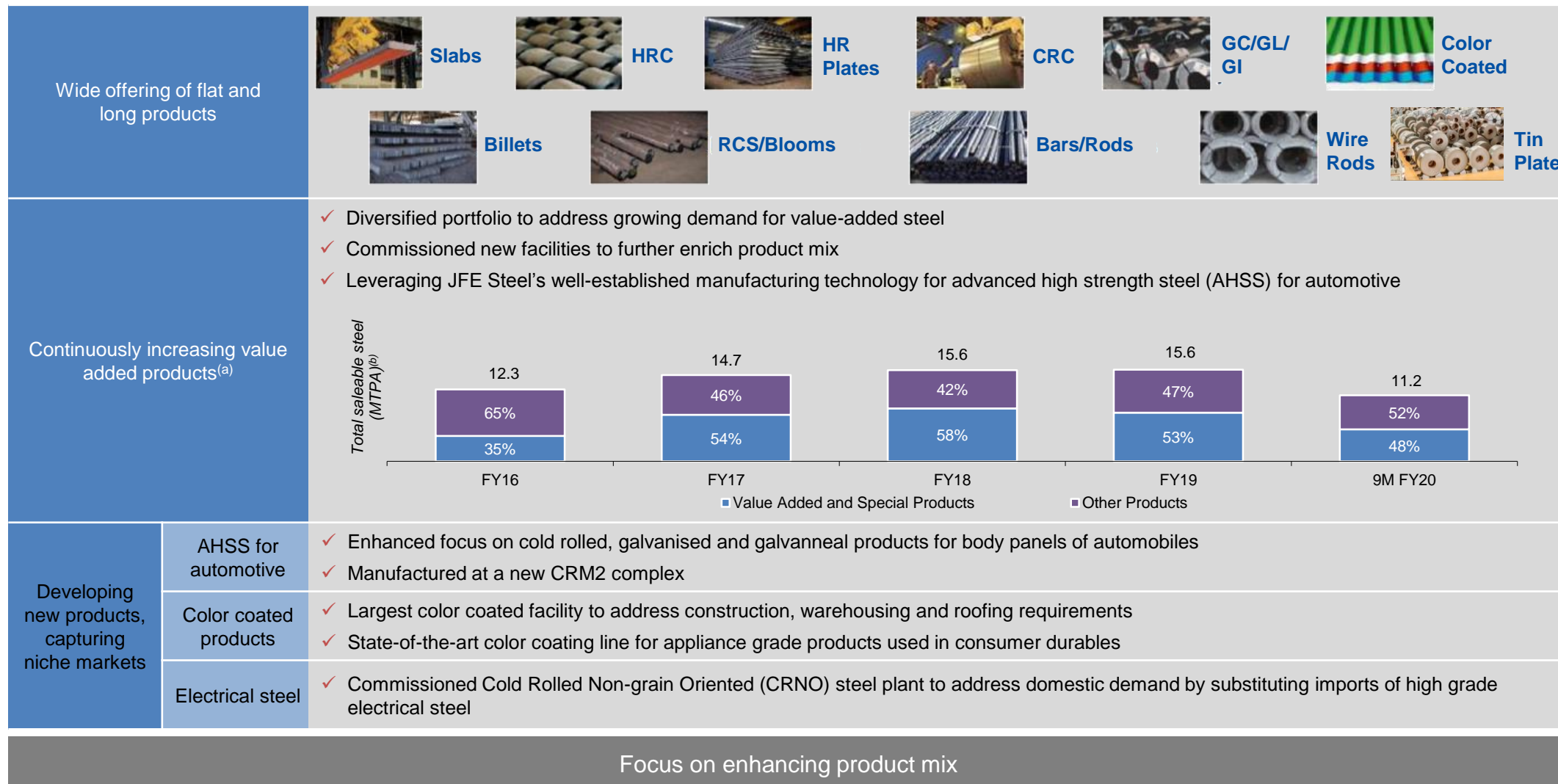
Flexibility to judiciously shift between domestic and international markets based on market conditions



- ✓ One of the largest exporter of steel products from India with export presence in over 100 countries
- ✓ Ability to re-align sales effort as per market conditions

Extensive geographical presence in India with nimble sales setup to shift sales judiciously between domestic market and exports

2 Strong business profile diversified by region, markets and products (continued)









(a) Total sales (JSW Standalone + JSW Steel Coated Products after netting-off inter-company sales). Value added and Special products (VASP) include HRPO, CRFH, CRCA, ES, Galvanised, Colour Coated, Tin Plate, Special Bars and Rounds. Special products include HR special, TMT Special and WR Special

3 Strong focus on operational efficiency with best-in-class conversion costs

Ongoing initiatives

Project	Description
Vijayanagar Works	
Pipe Conveyor system	<ul style="list-style-type: none"> To transport Iron ore from the mines to the Vijayanagar plant with a capacity of 20 MTPA (Phase 1 completed) Environmental friendly solution and reduction of transportation costs
Pellet and coke	<ul style="list-style-type: none"> Setup 8 mtpa pellet plant and 1.5 mtpa coke oven
Dolvi Works	
Capacity expansion	<ul style="list-style-type: none"> 4.5mtpa BF with 5MTPA Steel Melt Shop and 5MTPA Hot Strip Mill Coke Oven Phase 2: Second line of 1.5 MTPA coke oven battery along with CDQ
Vasind Works, Tarapur Works and Kalmeshwar Works	
Capacity modernization	<ul style="list-style-type: none"> Modernization and enhancement of capacity by 1.5 MTPA by setting up PLTCM Modernization cum Capacity enhancement which includes increase in GI/GL capacity by 1.08 MTPA and Color coating line by 0.28 MTP Setup additional 0.25 MTPA Tinplate line at Tarapur Enhancing capacity of pre-painted Galvalume Line (PPGL) at Kalmeshwar by 0.22 MTPA

Parameter^(a)       

Expanding Capacity	10 / 10	9	8	9	7	6	6
Location in high growth markets	10 / 10	8	7	6	5	6	4
Conversion costs; yields	10 / 10	8	10	10	10	8	10
Labor costs	10 / 10	7	7	8	5	9	6
Cost cutting efforts	9 / 10	7	9	7	10	8	8
Aggregate rank		17					

-  #1 ranked Indian player^(b)
-  #3 ranked Asian player^(b)
-  #7 ranked Global player^(b)

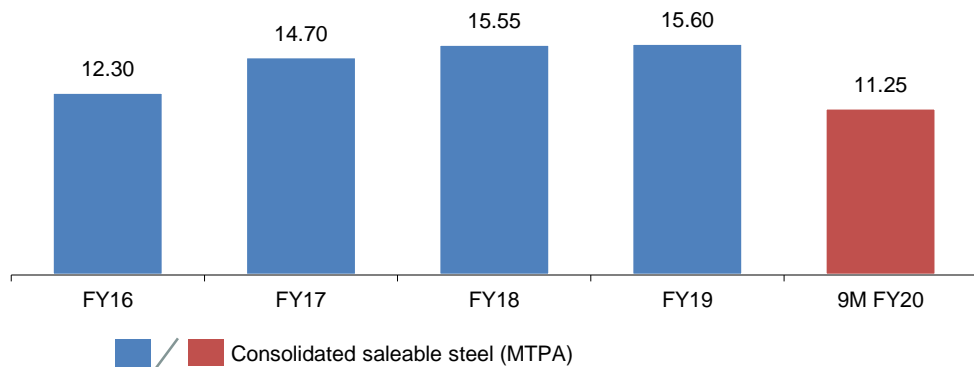
Source: World Steel Dynamics (World-Class Steelmaker Rankings as of June 2019)

(a) All quoted numbers are scores assigned out of 10 on World Steel Dynamics' World-Class Steelmaker Rankings as of Jun 19

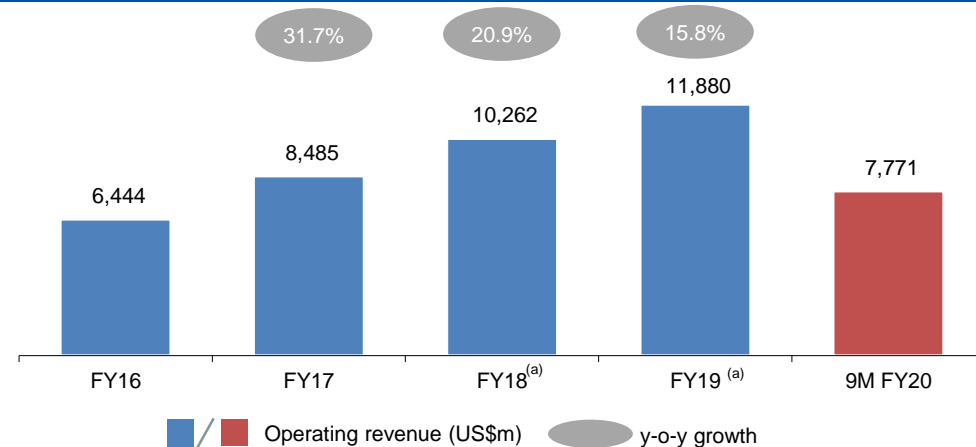
(b) On the basis of weighted average score out of 10 across 23 different parameters from World Steel Dynamics' World-Class Steelmaker Rankings as of Jun 19

4 Robust financial profile and stable cash flows

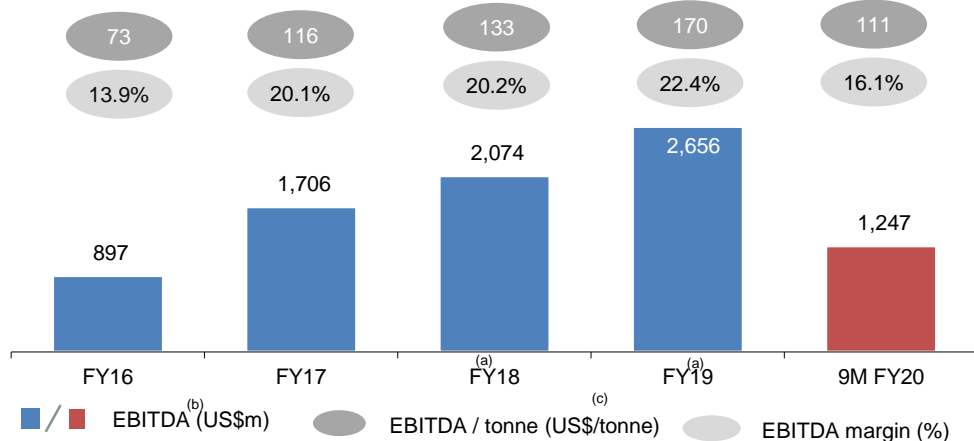
Strong track record of volume growth



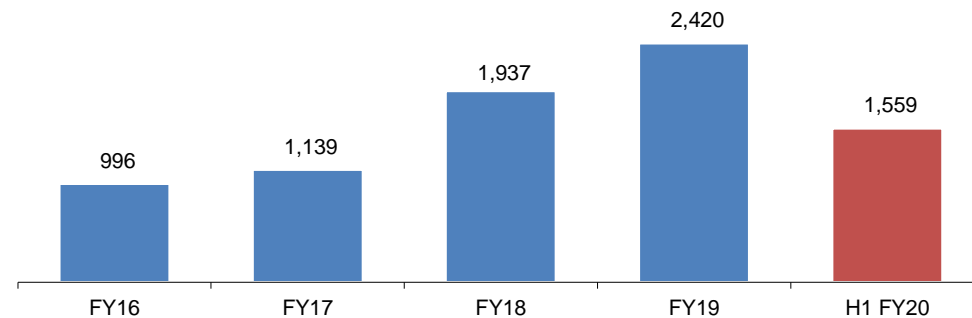
Positive momentum in operating revenues



EBITDA margin improvement of 850 bps from FY16 to FY19



Cashflow from operations (US\$m)



Note: Translated at 1 USD = 71.3449 INR, the RBI reference rate as of 31st Dec 2019

(a) FY18 numbers based on restated financials

(b) EBITDA calculated as total profit/(loss) for the year period +(-) share of profit/ loss from associate + (-) share of profit/ loss from joint ventures (net) +(-) taxes/(benefit) + exceptional items + depreciation and amortization expense + finance costs - other income

(c) Based on consolidated saleable steel volume

5 Prudent leverage management

Publicly stated financial policies



Focused leverage management

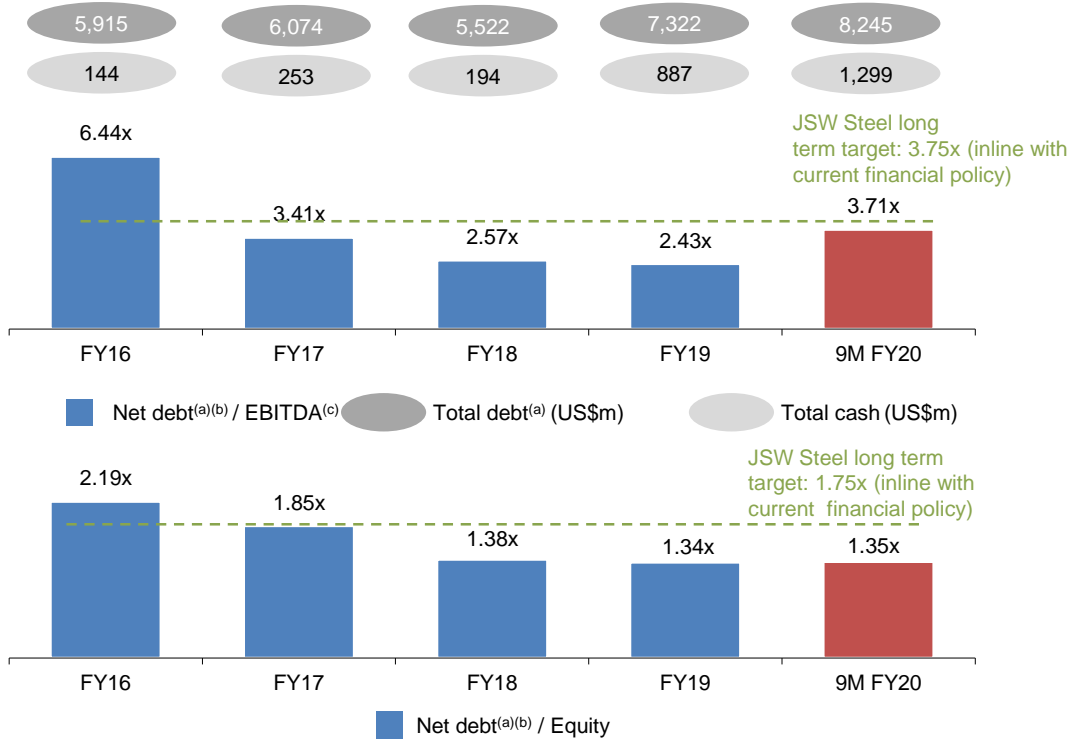


Diversify funding sources

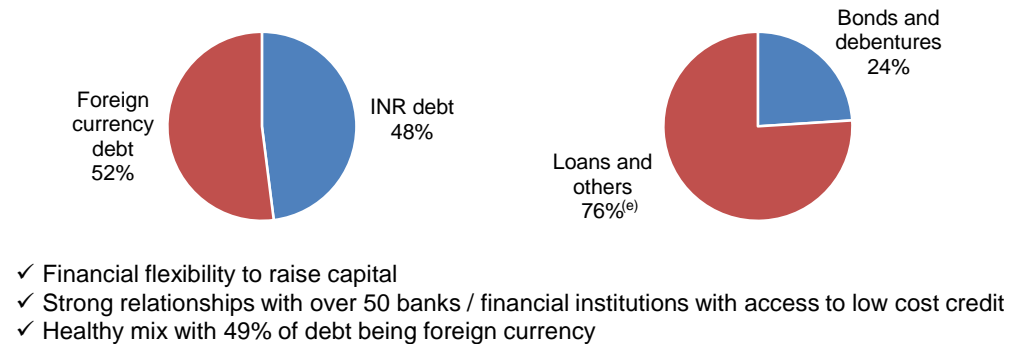


Improve debt maturity profile

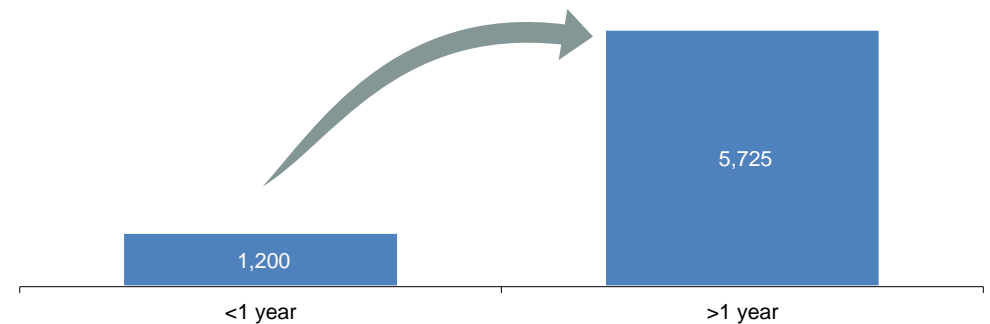
Strong y-o-y profitability improvement => reduction in net leverage



Diverse sources of funding^(d) (e)



Maturity profile of long term borrowings^(e) (f) (US\$)



Note: Translated at 1 USD = 71.3449 INR, the RBI reference rate as of 31st Dec 2019

(a) Debt excludes acceptances

(b) Net debt calculated as Non-current Borrowings + current borrowings + current maturities of long-term borrowings + current maturities of finance lease obligations - cash and cash equivalents - bank balances other than cash and cash equivalents - current investments

(c) EBITDA calculated as total profit/(loss) for the year/period +(-) share of profit/ loss from associate + (-) share of profit / loss from joint ventures (net) +(-) taxes/(benefit) + exceptional items + depreciation and amortization expense + finance costs - other income

(d) As of 31st Dec 2019

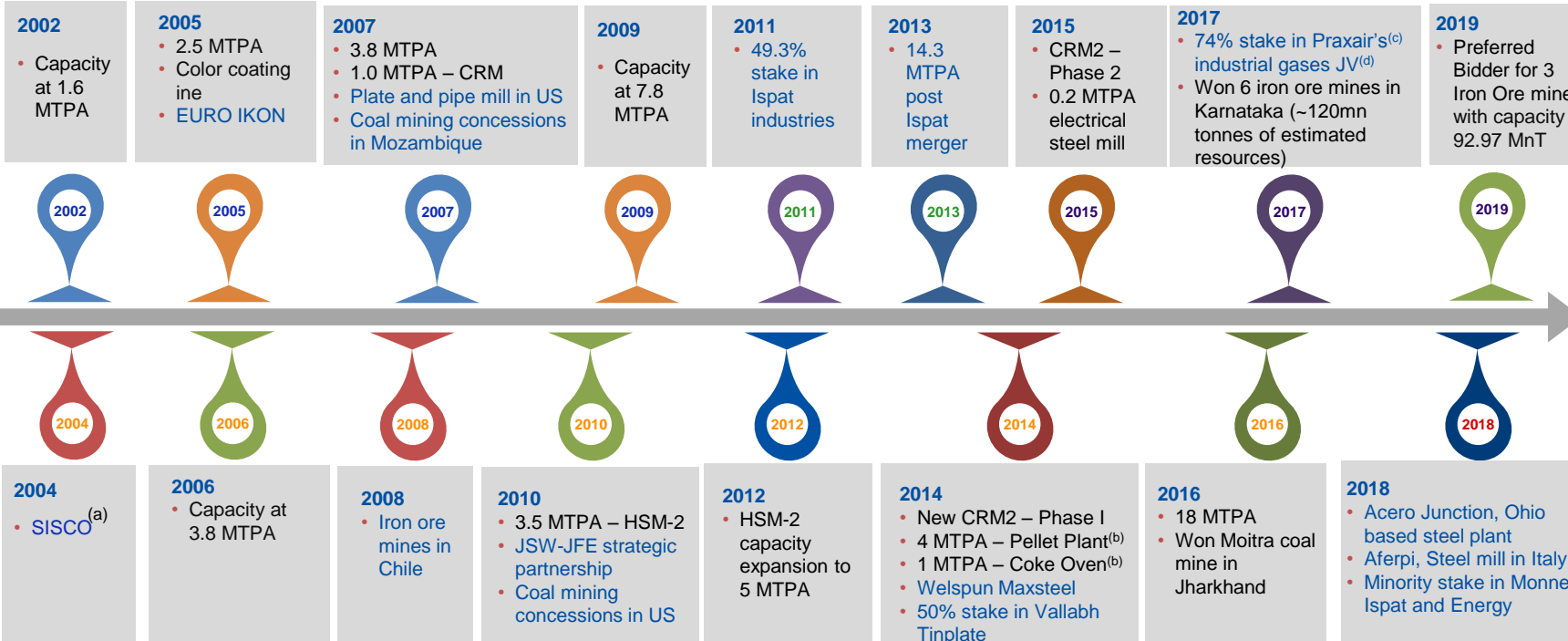
(e) Excluding preference share capital and unamortized upfront fees

(f) Comprises term loans, finance lease and export advance from customers, as of 31st Dec 2019

6 Proven track record of growth through organic and inorganic expansions

Combination of organic and inorganic growth

Key new projects



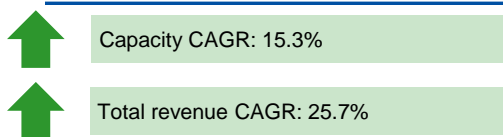
India

- Dolvi: Increasing steel making capacity to 10mtpa
- Vijayanagar: Capacity expansion of CRM-1 complex from 0.85 mtpa to 1.8 mtpa
- Vasind and Tarapur: Modernization-cum-capacity enhancement

International

- Investment, in phases, to develop steel manufacturing infrastructure in Baytown, Texas
- Integration of acquired Aferpi to establish its presence in the Italian and European specialty steel long products markets

CAGR FY2002 – FY2019



Continuously evaluating opportunities to deliver value enhancing growth

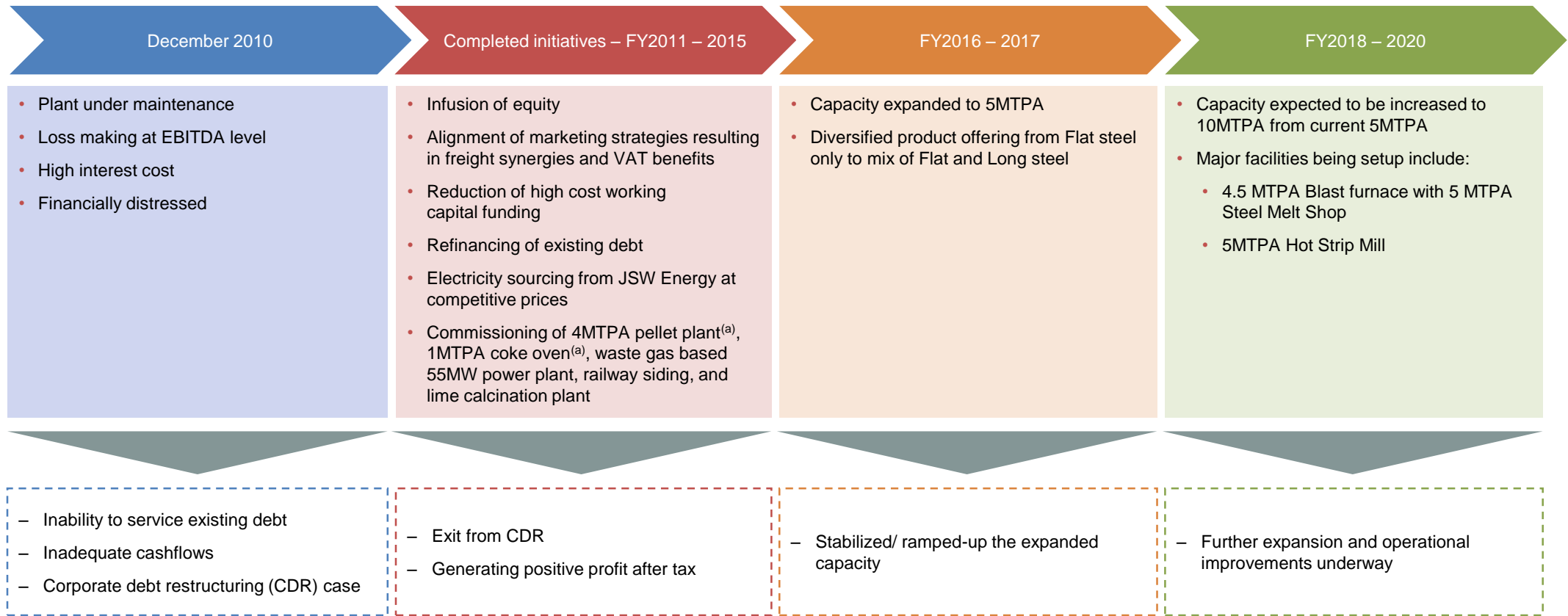
Note: Highlighted portions indicate acquisitions

- (a) Southern Iron and Steel Company
- (b) Amba River Coke Limited
- (c) Praxair India Private Limited
- (d) JSW Praxair Oxygen Private Limited

6 Proven track record of growth through organic and inorganic expansions (continued)

Case study: Turnaround strategy at JSW Ispat's Dolvi plant

JSW Steel has a proven track record of identifying, acquiring and integrating assets creating synergies and optimizing costs



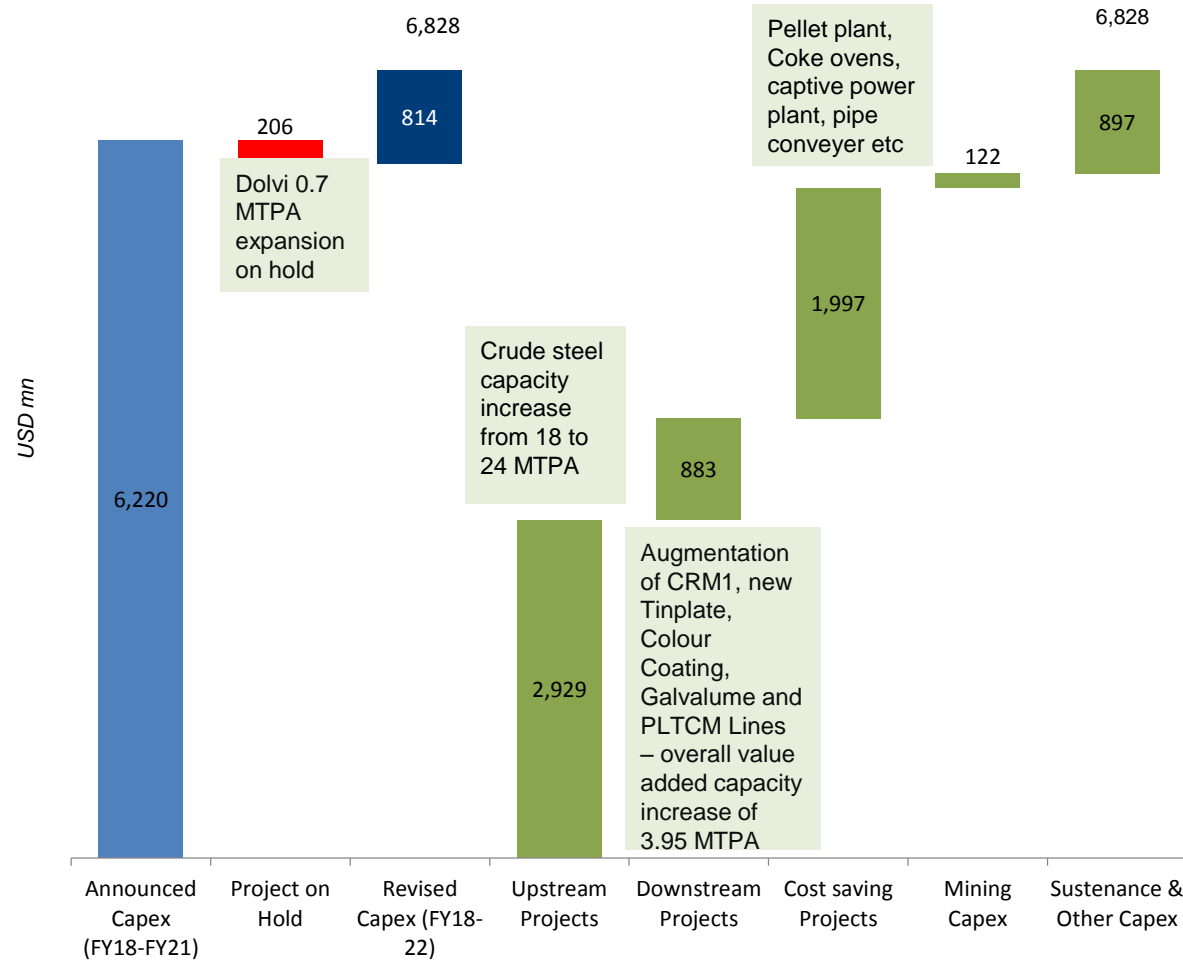
Able to leverage an acquisition to maximum value accretion through application of knowledge and experience

(a) Implemented in a wholly owned subsidiary Amba River Coke Limited

6 Proven track record of growth through organic and inorganic expansions (continued)

Detailed capex plan...

...based on a well thought-out guidelines / strategic rationale



Focus on return metrics instead of pure capacity addition. Capex spend of \$1.54 bn outlined for FY20.



Well planned spread-out of capex into phases with run-rate value addition at the end of each phase



Funding for capex well thought-out with a significant percentage being funded through internal accruals.



Track record of successful project execution on-time and within budget

Note: Translated at 1 USD = 71.3449 INR, the RBI reference rate as of 31st Dec 2019

7 Experienced management with strong parentage

Chairperson — Emeritus



Savitri Devi Jindal

Promoter Director



Sajjan Jindal
Chairman and
Managing Director

Executive Directors



Seshagiri Rao M.V.S
Joint Managing
Director
and Group CFO



Dr. Vinod Nowal
Dy. Managing Director



Jayant Acharya
Director
(Commercial and
Marketing)

Independent Directors



Malay Mukherjee
40yrs of rich experience
in mining and steel
industry



Harsh Charandas
Mariwala
Chairman of Marico,
Chairman and MD of
Kaya



Nirupama Rao
40yrs of experience as
a diplomat, Ex-Foreign
Secretary of India



Dr. Punita Kumar Sinha
Former CIO at The Asia
Tigers Fund



Haigreave Khaitan
Senior Partner at
M/s. Khaitan & Co



Seturaman Mahalingam
CA, Ex-CFO of TCS, Ex
member of the
Tax Administration
Reform Commission

Nominee Directors



Ganga Ram Baderiya,
IAS, Nominee Director
of KSIIDC



Hiroyuki Ogawa
Nominee Director of
JFE Steel Corporation



JSW-JFE partnership

Partnership overview

- 14.99% minority stake bought by JFE in 2010
- Access to cutting edge technologies
- Operational excellence for cost reduction
- Balance Sheet deleveraging to support growth

Technology agreements benefits:

- ✓ Access to fast growing auto steel market
- ✓ Technical know-how for electrical steel manufacturing
- ✓ Short learning curve
- ✓ Application engineering
- ✓ New product development
- ✓ Benchmarking and personnel training

Other benefits:

- ✓ Improvement in quality, productivity, yield, energy efficiency
- ✓ Sharing best maintenance, environment and safety practices
- ✓ Benchmarking, training and talent sharing
- ✓ Standardization of processes

Conclusion



Market leadership

- One of the largest steel manufacturers in India
- One of the largest steel exporters in India
- 53% (FY19) share of VASP and special products^(a)



Strong asset portfolio

- Geographically diversified with manufacturing facilities in South and West India
- Focus on flat steel products (approximately 75% of capacity) with higher entry barriers, differentiated end-product and sticky customer base
- Wide product range and new product development targeted at capturing niche markets eg. AHSS for auto, electrical steel for electrical motors, generators, power plants
- Flexibility to shift sales between domestic and international markets based on market conditions



Well placed to capitalize on improving macro environment

- Well placed to benefit from flexible raw material blends
- Lower cost captive iron ore mines in the state of Karnataka with cumulative capacity of 4.5 MTPA
- Five of the six iron ore mines are in operation
- Planned capex and brownfield expansions to further catalyze growth



Strong growth with improving leverage and robust financial profile

- 8.4% saleable steel CAGR and 22.6% revenue CAGR FY16-19
- 850 bps EBITDA margin expansion from FY16 through FY19
- Strong balance sheet position with net leverage reduced from 6.44x in FY16 to 3.71x^(b) in 9M FY20

Note 1: Net debt calculated as Non-current Borrowings + current borrowings + current maturities of long-term borrowings - cash and cash equivalents - bank balances other than cash and cash equivalents - current investments

Note 2: EBITDA calculated as total profit/(loss) for the year/period +/- share of profit/ loss from associate +/- share of profit/ loss from joint ventures (net) +/- taxes/(benefit) + exceptional items + depreciation and amortization expense + finance costs - other income

- (a) As per FY19 consolidated saleable steel volume
(b) Net debt as of Dec 2019 upon LTM EBITDA as of Dec 2019



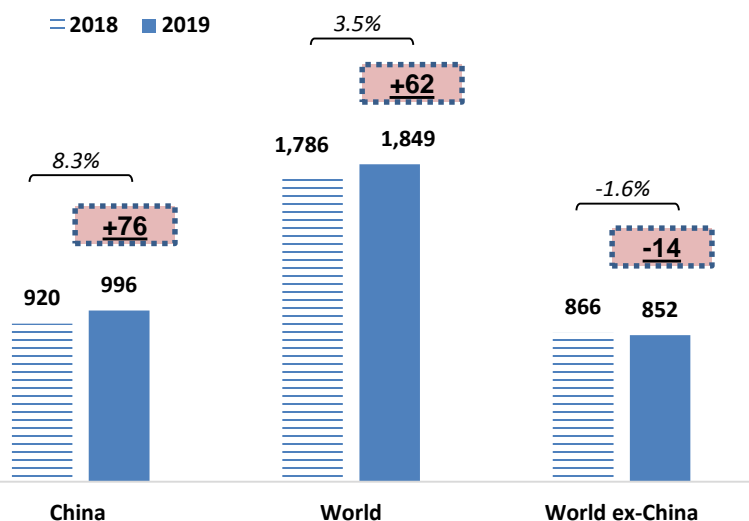
**JSW Group and
company
overview**

Key highlights

Appendix

Reducing Chinese steel exports supplemented with strong fundamental for domestic consumption growth

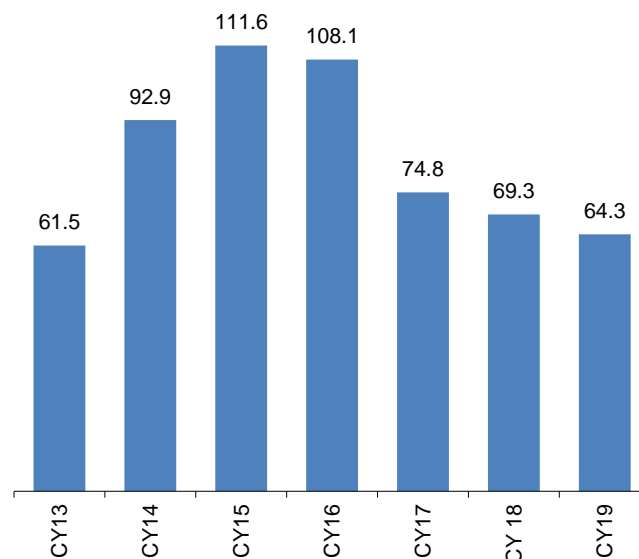
Global Crude Steel Production (MTPA)



- ✓ Chinese steel production continues to grow, however steel exports out of China are declining
- ✓ Supply side calibration in World ex China production is positive

Source: WSA

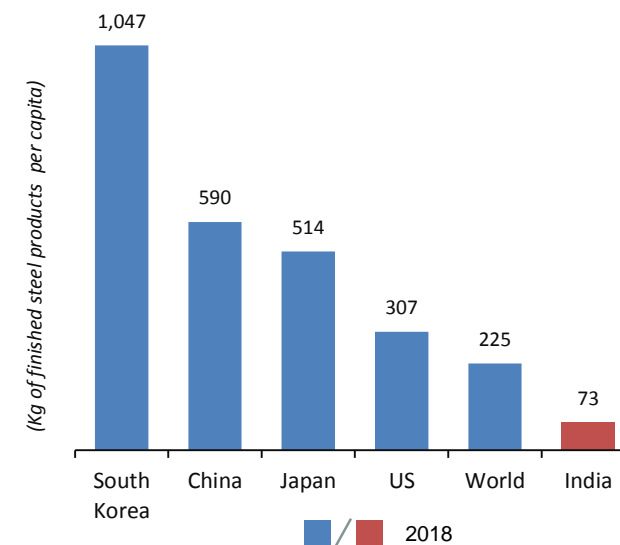
China steel exports (MTPA)



- ✓ China has closed most of its outdated and inefficient induction furnaces
- ✓ The government has introduced pollution-induced production curtailments
- ✓ Stable domestic demand in China

Source: WSA

Significant room for improvement in per-capita consumption in India

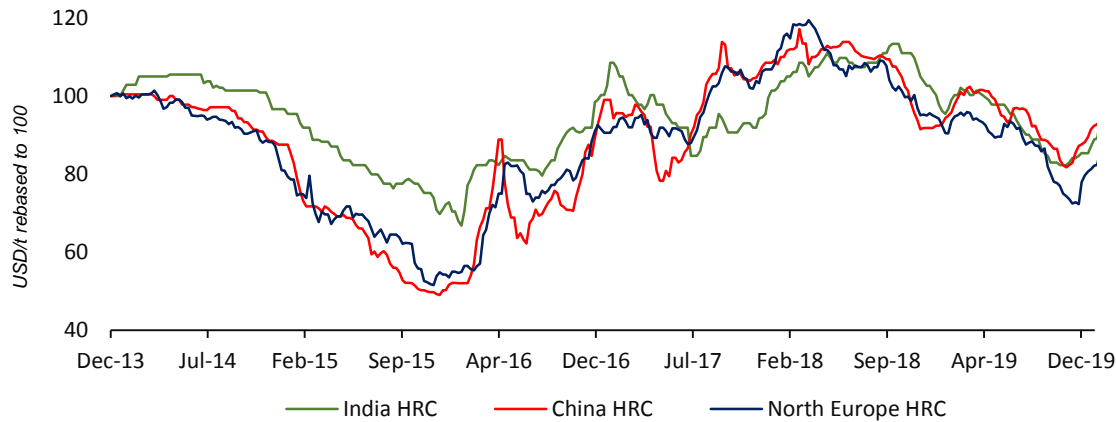


- ✓ Lower per capita consumption compared to international average
- ✓ Infrastructure, oil and gas expected to drive the growth of the industry
- ✓ Improving policy support from the central government

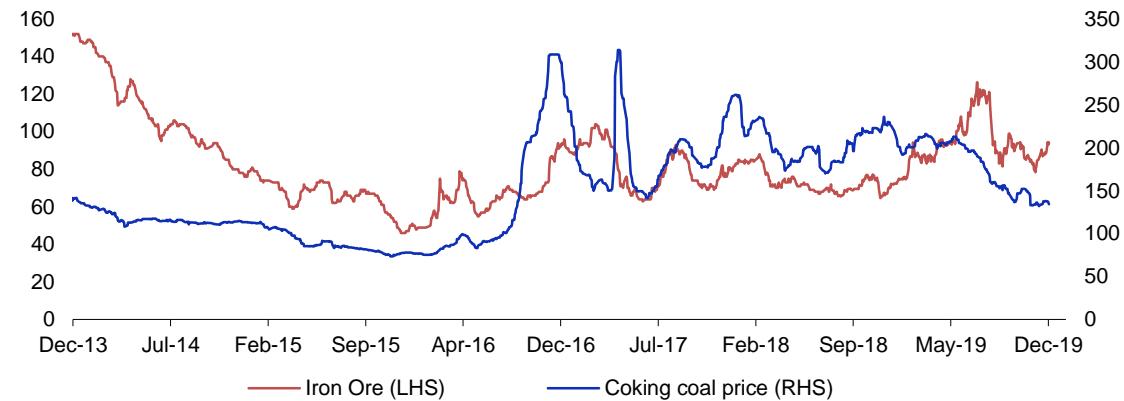
Source: WSA (World Steel in Figures 2019), Joint Planning Committee

Strong momentum in steel prices, with increase faster than raw material cost rise leading to positive spread

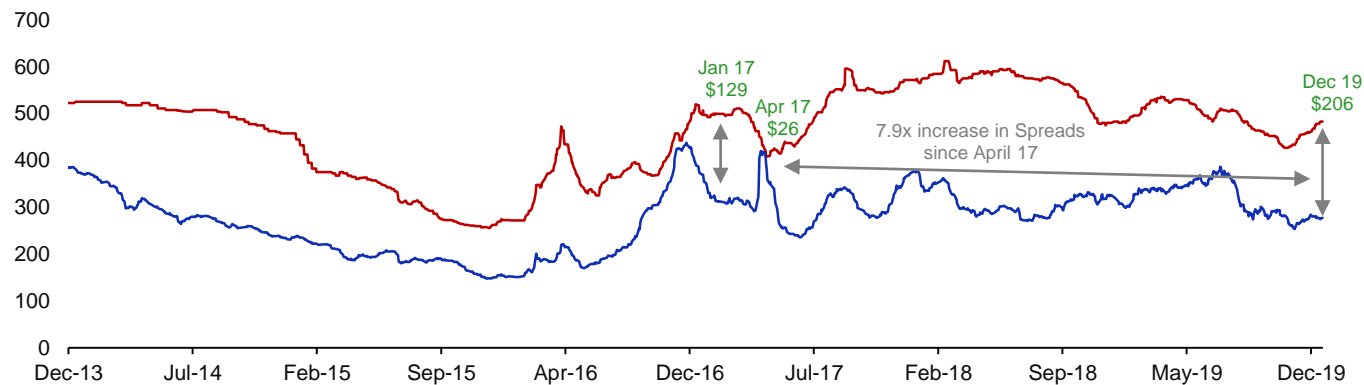
Steel prices have trended upward since Q4 CY15



Raw material price trends (US\$/tonne)^{(a) (b)}



Steel spreads (US\$/tonne)^(c)



Consolidated financials

Particulars (US\$m)	FY16	FY17	FY18 ^(a)	FY19 ^(b)	9M FY20
Operating revenue	6,444	8,485	10,262	11,880	7,771
Operating EBITDA ^(c)	897	1,706	2,074	2,656	1,247
% margin	13.9%	20.1%	20.2%	22.4%	16.1%
Profit before tax	(346)	719	1,072	1,565	406
Profit after tax	(67)	486	875	1,055	523
Shareholder's equity ^(d)	2,631	3,140	3,859	4,808	5,145
Net Debt	5,772	5,824	5,329	6,443	6,945
Net Debt / Equity	2.19x	1.85x	1.38x	1.34x	1.35x
Net Debt / EBITDA	6.44x	3.41x	2.57x	2.43x	3.71x

Note 1: Financials as per Ind-AS, translated at 1 USD = 71.3449 INR

Note 2: Net debt calculated as Non-current Borrowings + current borrowings + current maturities of long-term borrowings + current maturities of finance lease obligations - cash and cash equivalents - bank balances other than cash and cash equivalents - current investments (net debt excludes acceptances)

Note 3: EBITDA calculated as total profit/(loss) for the year/period +/- share of profit/ loss from associate + (-) share of profit/ loss from joint ventures (net) +/- taxes/(benefit) + exceptional items + depreciation and amortization expense + finance costs - other income

- (a) FY18 and financials restated
- (b) FY19 and 9M FY20 numbers include 750 million dollars of export advance
- (c) EBITDA based on group definition
- (d) Includes non controlling interest

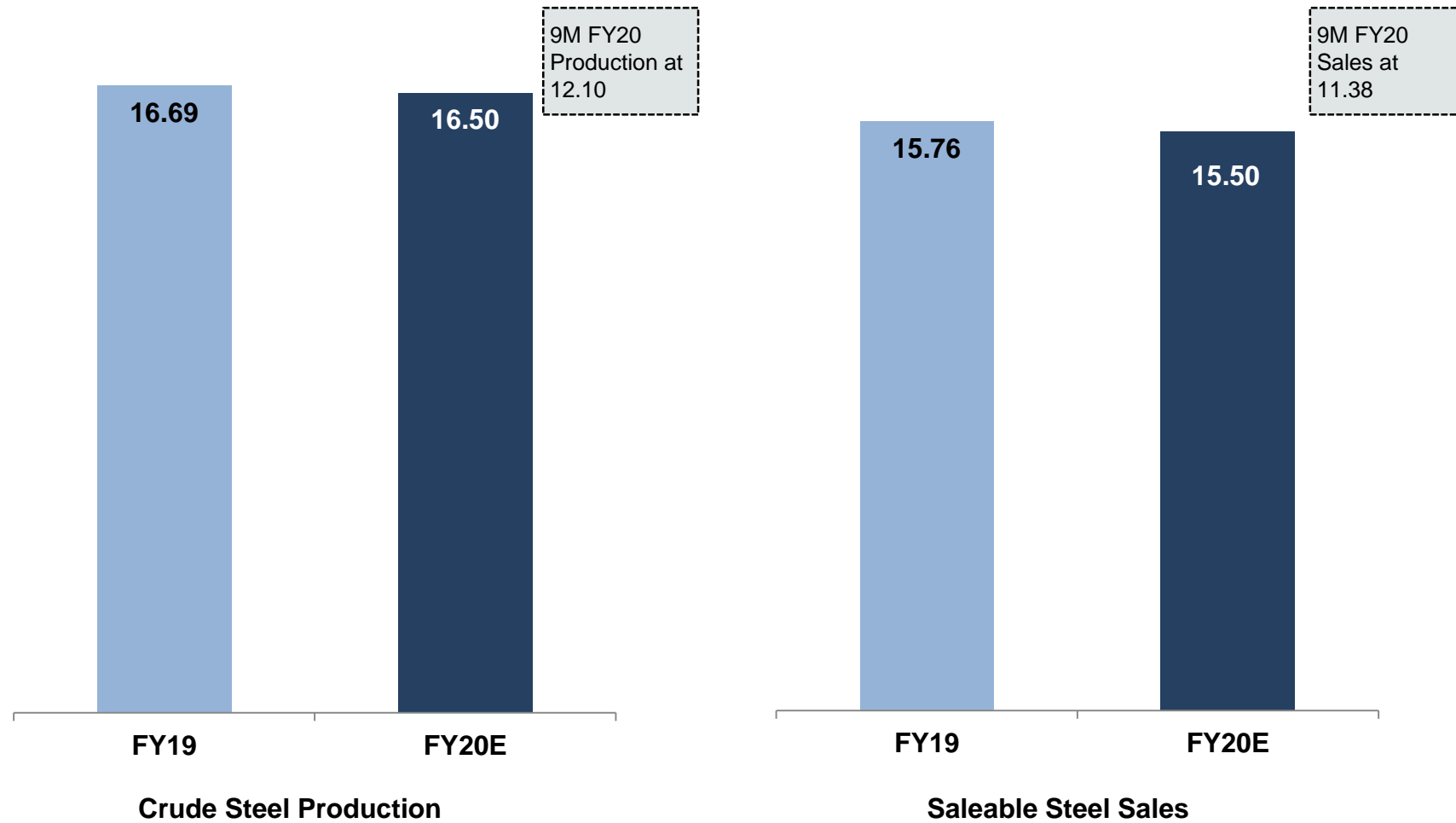
Standalone financials

Particulars (US\$m)	FY16	FY17	FY18 ^(a)	FY19 ^{(a) (b)}	9M FY20
Crude Steel production	12.56	15.8	16.27	16.69	12.10
Total Saleable steel	12.13	14.77	15.62	15.76	11.38
Operating revenue	5,727	7,977	9,492	10,754	6,866
Operating EBITDA	893	1,618	1,926	2,579	1,303
<i>% margin</i>	15.6%	20.3%	20.3%	24.0%	19.0%
EBITDA/tonne (USD/MT)	74	110	123	164	114

Note 1: Financials as per Ind-AS, translated at 1 USD = 71.3449 INR

Note 2: EBITDA calculated as total profit/(loss) for the year/period +(-) share of profit/ loss from associate + (-) share of profit / loss from joint ventures (net) +(-) taxes/(benefit) + exceptional items + depreciation and amortization expense + finance costs - other income

Volume guidance for FY20



All figures are in million tonnes

Key Projects- Upstream Projects

Dolvi: increasing steel making capacity to 10 MTPA

- Total project cost – `15,000 crore (USD \$2,103M)
- Total capacity will be increased from 5 MTPA to 10 MTPA. The major facilities to be set-up under the expansion project are:
 - 4.5 MTPA Blast furnace with 5 MTPA Steel Melt Shop
 - 5 MTPA Hot Strip Mill
- Commissioning: during H1 FY21

Vijayanagar Augmentation Steel Making capacity to 13 MTPA

- Total project cost – `2,300 crore (USD \$322M)
- Enhance SMS capacity, augment existing HSM and Wire Rod Mills to support the upgradation of BF-3

Key Projects- Downstream Projects

Vijayanagar: CRM-1 complex capacity expansion

- Total project cost – `2,000 crore (USD \$280M)
- CRM1 complex capacity will be increased from 0.85 MTPA to 1.80 MTPA along with two Continuous Galvanizing Line of 0.45 MTPA each, a new 1.2 MTPA Continuous Pickling Line for HRPO products
- Commissioning in phases during H1 FY21

Vasind and Tarapur: modernisation-cum-capacity enhancement

- Total project cost – `1,730 crore (USD \$243M)
- The modernisation cum capacity enhancement project includes:
 - increase in GI/GL capacity by 1.08 MTPA
 - increase in colour coating capacity by 0.28 MTPA
- Commissioning in phases during H1 FY21

Downstream: new capacity, modernisation-cum-capacity enhancement

- Total project cost – `940 crore (USD \$132M)
- The modernisation cum capacity enhancement project includes:
 - Setting up Color Coating Line at Vijayanagar of 0.3 MTPA
- Capacity enhancement of PPGL at Kalmeshwar by 0.22 MTPA
 - Commissioning: by March 2021
- Additional Tinplate Line at Tarapur 0.25 MTPA
 - Commissioning by March 2022

- Total project cost – `700 crore (USD \$98M)
 - 0.5mtpa New Continuous Annealing Line at Vasind ,Commissioning by March 2022
- Total project cost – `200 crore (USD \$28M)
 - 0.25mtpa new Color Coated Line at Rajpura in the state of Punjab, Commissioning by March 2022

Key Projects- Manufacturing Integration and Cost Savings projects

Vijayanagar: Manufacturing Integration

- Total project cost – ` 5,200 crore (USD \$729M)
 - Pellet plant 8 MTPA , Commissioning: by Q1 FY21
 - Coke oven battery 1.5 MTPA, Commissioning: in FY21

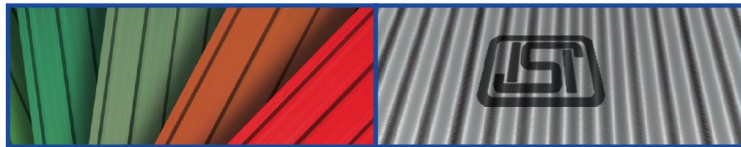
Dolvi – Captive Power

- Total project cost – ` . 975 crore (USD \$137M)
- Install 175 MW WHRB and 60 MW CPP to harness flue gases and steam from CDQ
- Commissioning: by Q1 FY21

Dolvi Coke Projects Phase 2

- Total project cost – ` 2,050 crore (USD \$287M)
- Phase 2: Second line of 1.5 MTPA coke oven battery along with CDQ
- Commissioning: by H1 FY21

JSW Steel Branded Portfolio



JSW Everglow
Advanced Roofing Technology
Beautiful Inside, Beautiful Outside

JSW Colouron+
Premium Al-Zn Colour Coated Sheets
Roofs that add beauty to your home

JSW Galvos
Premium GALVALUME
Coil & Sheets
Cost-effective Galvalume sheets
that stand the test of time

JSW Galveco
Lead Free Galvanised Sheets
100% eco-friendly galvalume sheets

JSW Colouron
Premium Al-Zn Colour Coated Sheets
Excellent and innovative
mix of colour and durability

JSW Pragati
Colour Coated Sheets
Cost-effective coloured roofing solutions



JSW Trusteel
Premium Hot Rolled Sheets

JSW Neosteel
Pure TMT Bars
Foundation to every strong structure

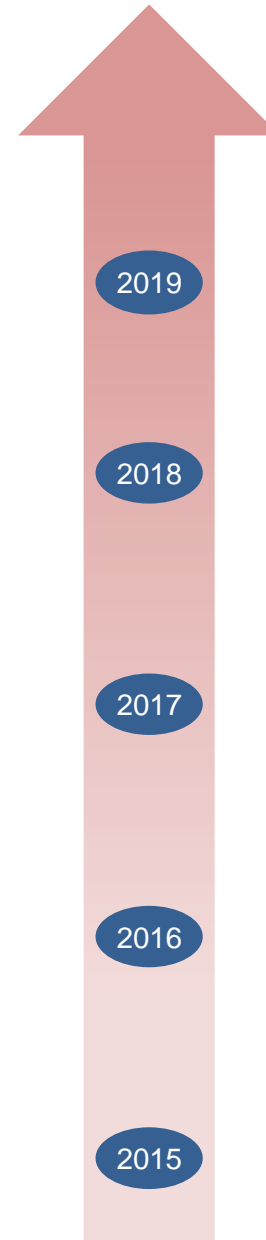
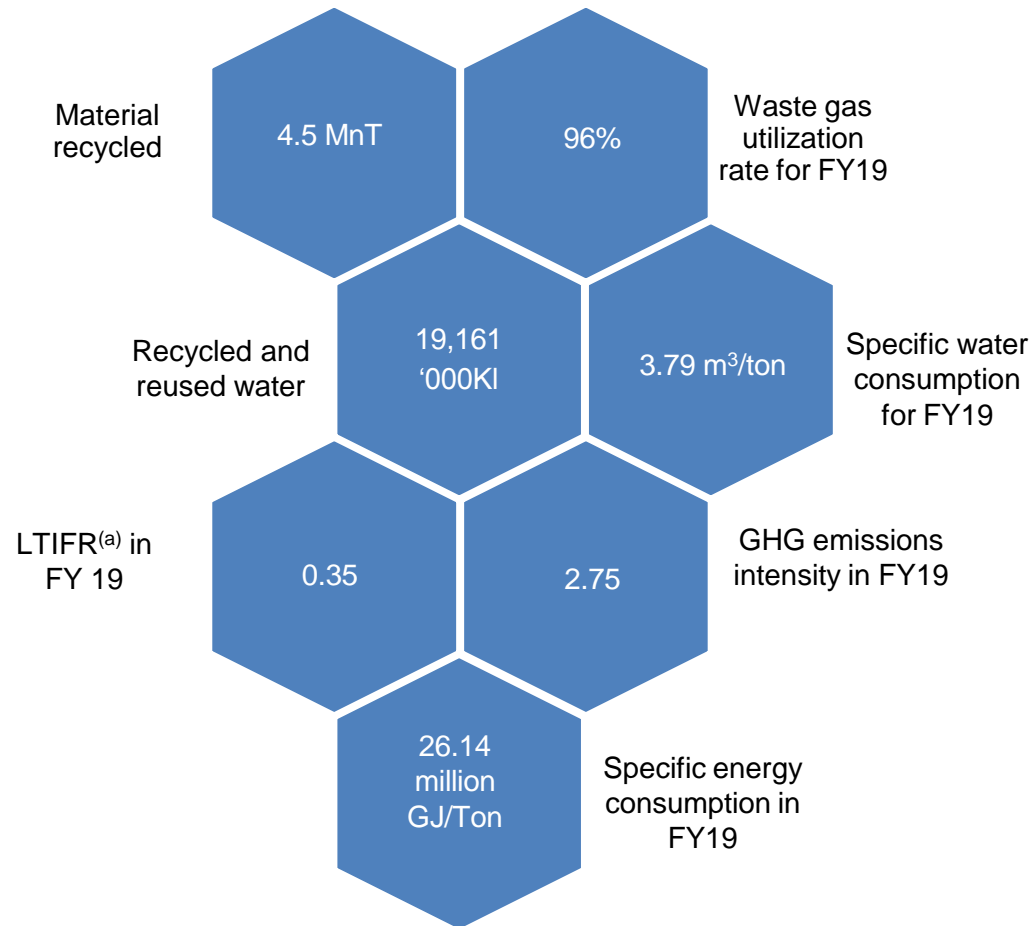
JSW Vishwas
Premium GC Sheets
Finest quality steel roofs


JSW Vishwas+
Premium AL-Zn Sheets
Anti-corrosive sheets
that stand the test of time




JSW PEHAL
Steel Toilet
Quality sanitation is everyone's right

Performance on sustainability metrics




- 


2019

Recognised as one of the “Steel Sustainability Champion” by World Steel Association
Deming Award for Salem Works
- 


2018

Deming Award for Vijayanagar Works
JSW Steel included in the NIFTY 50 Index
- 

2017

Golden Peacock Innovative Product Award
- 

2016

“National Award for Supply Chain and Logistics Excellence” under the steel industry category by the Confederation of Indian Industry
- 

2015

“Industry Leadership Award” in steel, metals and mining at Platts Global Metals Awards

The background features a dense pattern of blue wire coils, likely representing a manufacturing or industrial setting. A prominent graphic element is a large, sweeping swoosh that curves from the bottom left towards the top right. This swoosh is composed of a red outer layer and a white inner layer, set against a dark blue background. The text "Thank you" is centered in the upper portion of the image, overlaid on the blue wire coils.

Thank you