



PRICOL LIMITED

Passion to Excel

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pricol.com

CIN: L34200TZ2011PLC022194

CUSTOMERS EMPLOYEES SHAREHOLDERS SUPPLIERS

PL/SEC/TGT/2021-2022
Thursday, 27th May, 2021

Listing Department National Stock Exchange of India Limited "Exchange Plaza", C-1, Block G Bandra-Kurla Complex, Bandra (E), Mumbai - 400051 Script Code: PRICOLLTD	Corporate Relationship Department BSE Limited 1 st Floor, New Trading Ring Rotunda Building, P J Towers, Dalal Street, Fort, Mumbai 400 001 Script Code: 540293
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Dear Sir,

Sub: **INVESTOR PRESENTATION**

Pursuant to Regulation 30(6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we herewith submit the presentation to be used for the Investor Conference call on the audited financial results for the quarter and year ended 31st March 2021, to be held today at 1600 (IST).

This is for your information and records.

Thanking you

Yours faithfully,
For Pricol Limited

T.G.Thamizhanban
Company Secretary
ICSI M.No: F7897

Encl: As above



**PRICOL LIMITED Q4 & FY21
INVESTOR PRESENTATION
27th May 2021**



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COMPANY PROFILE



PRICOL LIMITED
Passion to Excel

Corporate Profile

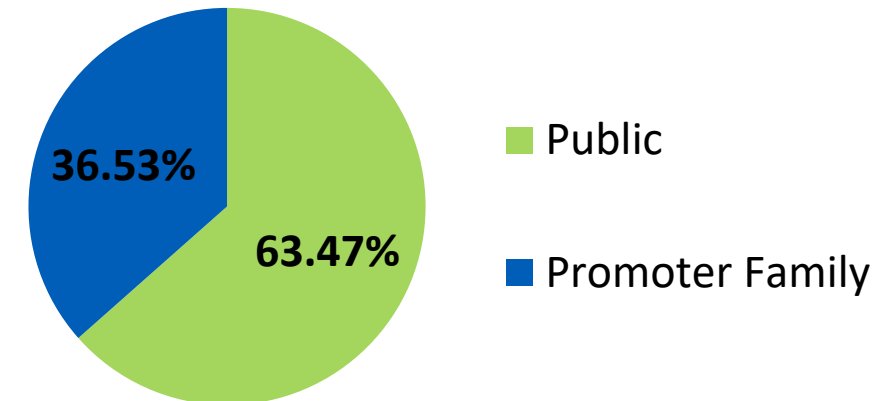
- Pricol Limited commenced operations in 1974 with headquarters in Coimbatore, India
- 9 Manufacturing Locations
 - 7 Manufacturing Locations in India
 - 1 Manufacturing Location in Indonesia
 - 1 Subsidiary Location in India
- 2 International Offices in Tokyo & Singapore
- Standalone Turn Over Details (INR In Crores)
 - FY 2019-20 : 1212.96
 - FY 2020-21 : 1397.81

Pricol Limited

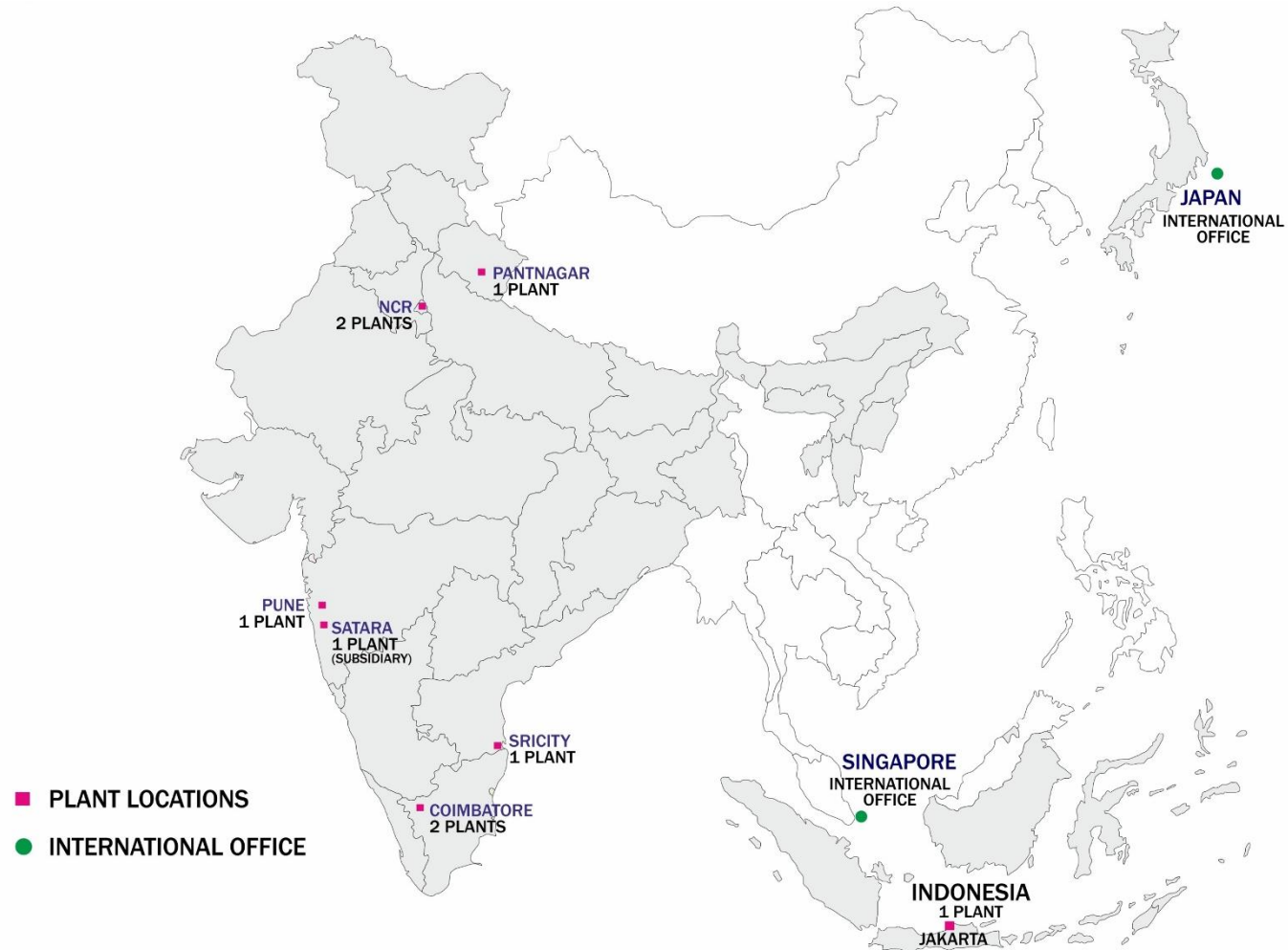


- IATF 16949:2016
 - ISO 14001:2015
 - ISO 45001:2018.
- (Obtained ISO 9001 in the year 1993)

Share Holding Pattern – March 31, 2021



Our Presence



Product Verticals

Driver Information System



Connected Cluster



Sensors & Switches



TFR Type Fuel Level Sensor



Reed Type Fuel Level Sensor



Speed Sensor



Camshaft/ Crankshaft
Position Sensor

Pumps & Mechanical

Fuel Pump
Module



Water Pumps



Oil Pumps
(Gerotor & Variable Oil Flow)



Telematics Connected Vehicle Solution



Auto Electrical Products

Wiping Systems



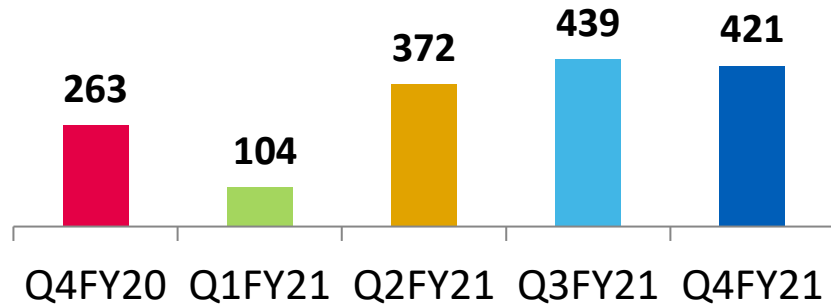
PERFORMANCE INDICATORS



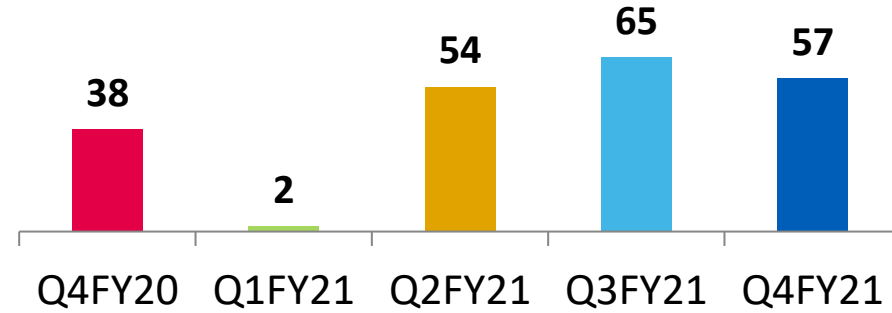
Quarterly Highlights (Standalone)

Rs. in Crores

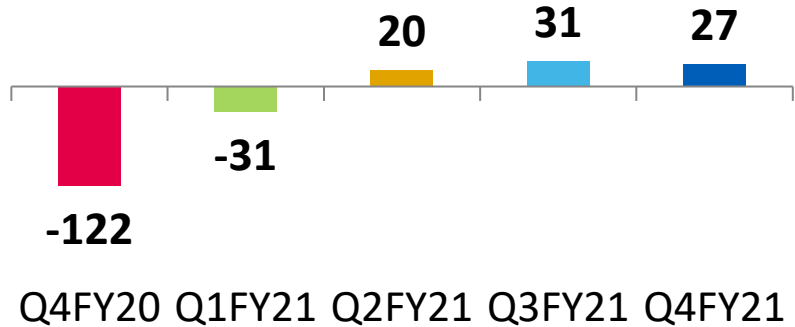
Revenue from Operations



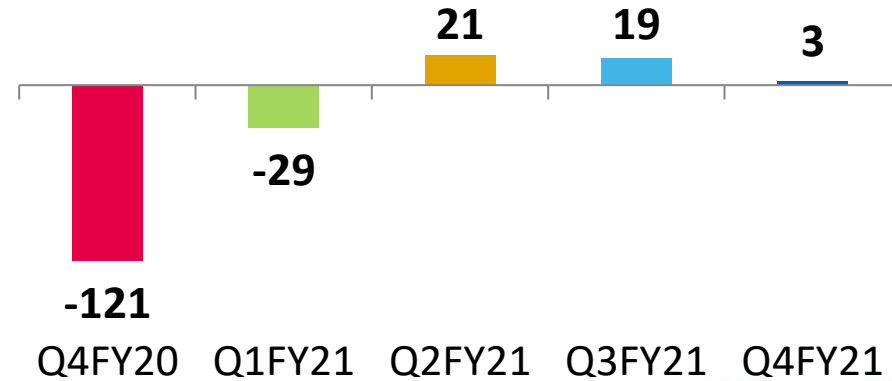
Operational EBITDA



Profit Before Tax



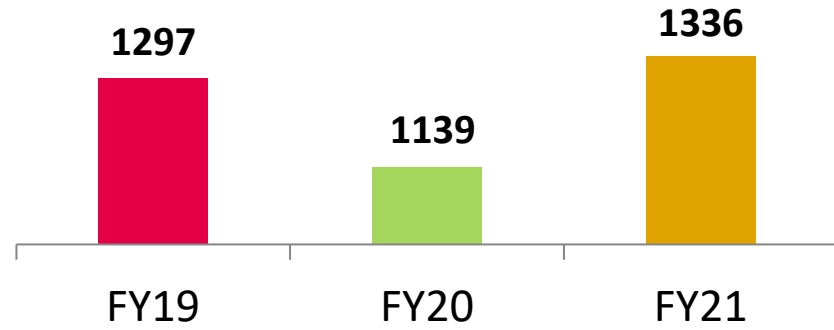
Profit After Tax



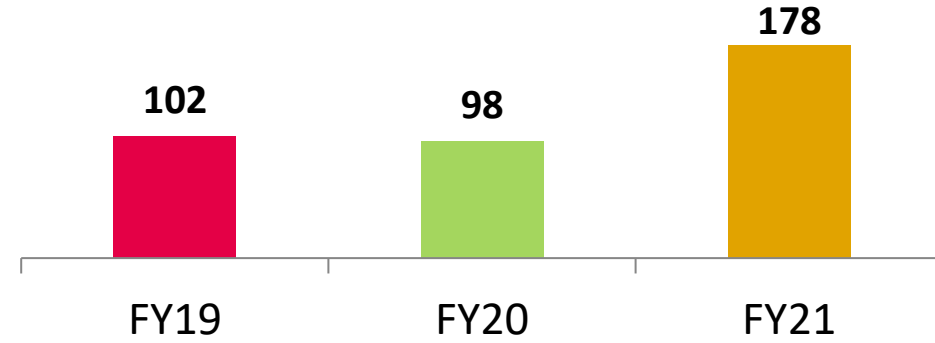
Yearly Highlights (Standalone)

Rs. in Crores

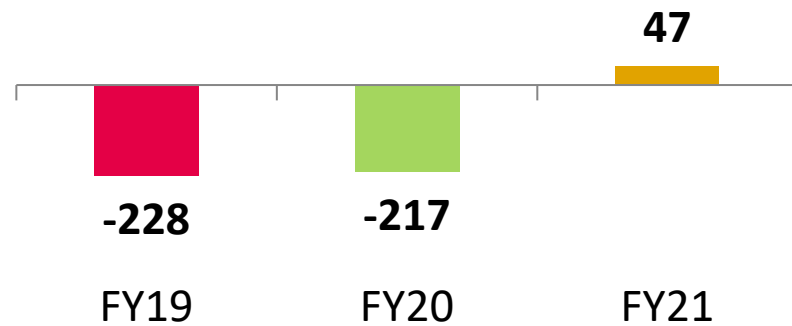
Revenue from Operations



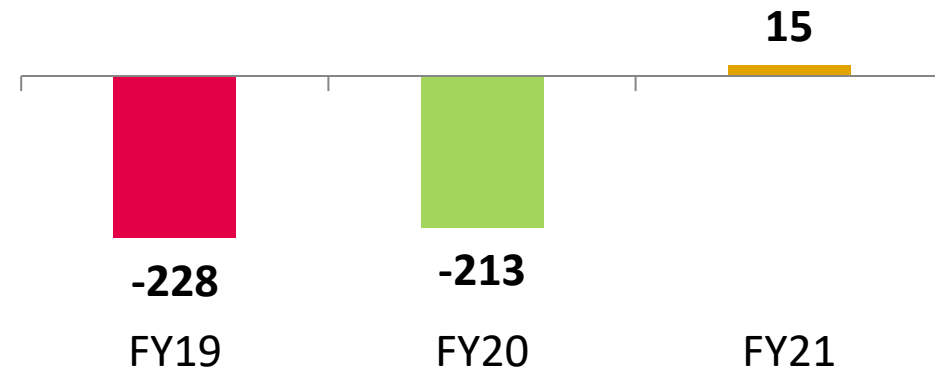
Operational EBITDA



Profit Before Tax



Profit After Tax



FINANCIALS



Income – Q4 & FY21 (Standalone)

Rs. In Lakhs

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
Revenue from Operations	42,094.30	26,338.73	1,33,615.33	1,13,904.87
Growth %	59.82%	-16.66%	17.30%	-12.19%
Other Operating Revenue	1,646.57	1,390.00	5,417.15	6,128.12
Other Income	78.61	958.94	748.68	1,263.23
Total Revenue	43,819.48	28,687.67	1,39,781.16	1,21,296.22

Profit from Operations- Q4 & FY21 (Standalone)

Rs. In Lakhs

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Profit / (Loss) Before Tax	2,676.27	(12,247.75)
Add : Amortisation of Intangibles	557.77	562.43
Add : Provision for Impairment - Non Current Investments	-	12,702.64
Profit / (Loss) from Operations before other Comprehensive Income	3,234.04	1,017.32
Other Comprehensive Income / (Expense)	(223.19)	256.38
Profit / (Loss) from Operations	3,010.85	1,273.70

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
Profit / (Loss) Before Tax	4,651.68	(21,672.17)
Add : Amortisation of Intangibles	2,262.07	2,262.07
Add : Provision for Impairment - Non Current Investments	-	19,072.36
Profit / (Loss) from Operations before other Comprehensive Income	6,913.75	(337.74)
Other Comprehensive Income / (Expense)	20.25	295.08
Profit / (Loss) from Operations	6,934.00	(42.66)

EBITDA

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Profit / (Loss) from Operations	3,010.85	1,273.70
Depreciation	1,641.39	1,751.06
Interest	866.80	1,073.41
EBITDA	5,519.04	4,098.17
Revenue from Operations	42,094.30	26,338.73
EBITDA % on Revenue from Operations	13.11%	15.56%

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
Profit / (Loss) from Operations	6,934.00	(42.66)
Depreciation	6,832.97	7,007.17
Interest	4,052.86	3,108.45
EBITDA	17,819.83	10,072.96
Revenue from Operations	1,33,615.33	1,13,904.87
EBITDA % on Revenue from Operations	13.34%	8.84%



Cash Profit & Free Cash Flow – Q4 & FY21 (Standalone)

Rs. In Lakhs

CASH PROFIT

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
EBITDA	5,519.04	4,098.17
Less : Interest	866.80	1,073.41
Cash Profit	4,652.24	3,024.76

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
	17,819.83	10,072.96
	4,052.86	3,108.45
	13,766.97	6,964.51

FREE CASH FLOW

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Cash Profit	4,652.24	3,024.76
Less : Capex	1,033.04	799.81
FREE CASH FLOW AFTER CAPEX	3,619.20	2,224.95

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
	13,766.97	6,964.51
	2,967.04	5,372.77
	10,799.93	1,591.74

Balance Sheet – FY21 (Standalone)

Rs. In Lakhs

Particulars	31-3-2021 Lakhs	31-3-2020 Lakhs
I. ASSETS		
(1) Non-current Assets		
(a) Property, Plant and Equipment	35,293.50	39,569.95
(b) Right of Use	3,675.97	3,307.93
(c) Capital Work-in-progress	1,975.66	2,025.41
(d) Investment Property	1,503.46	951.74
(e) Goodwill	8,940.60	9,934.00
(f) Other Intangible assets	11,681.86	14,036.10
(g) Intangible Assets under Development	-	35.03
(h) Financial Assets		
i) Investments	5,946.90	4,671.90
ii) Loans	-	-
iii) Others	803.42	772.36
(i) Other Non-Current Assets	3,348.10	5,907.95
Total Non-current Assets	73,169.47	81,212.37
(2) Current Assets		
(a) Inventories	23,909.12	17,066.02
(b) Financial Assets		
i) Investments	80.15	470.94
ii) Trade Receivables	18,247.98	16,927.96
iii) Cash and Cash equivalents	1,650.28	233.11
iv) Bank Balances other than (iii) above	1,180.88	1,084.24
v) Loans	-	175.00
vi) Others	101.21	99.87
(c) Other Current Assets	1,481.91	1,532.81
Total Current Assets	46,651.53	37,589.95
Non-Current Investments held for Sale	-	-
Non-Current Assets held for Sale	-	-
	46,651.53	37,589.95
TOTAL ASSETS	1,19,821.00	1,18,802.32

Balance Sheet – FY21 (Standalone)

Rs. In Lakhs

Particulars	31-3-2021 Lakhs	31-3-2020 Lakhs
II. EQUITY AND LIABILITIES		
(1) Equity		
(a) Equity Share Capital	1,218.81	947.97
(b) Other Equity	51,132.97	41,978.38
Total Equity	52,351.78	42,926.35
(2) Non-current Liabilities		
(a) Financial Liabilities		
i) Borrowings	18,551.43	20,410.09
ii) Others	3,400.17	2,791.70
(b) Provisions	990.35	1,023.17
(c) Deferred Tax Liabilities (Net)	5,735.66	5,189.85
(d) Other Non-current Liabilities	-	12.02
Total Non-current Liabilities	28,677.61	29,426.83
(3) Current Liabilities		
(a) Financial Liabilities		
i) Borrowings	-	8,819.84
ii) Trade Payables		
- Total Outstanding dues of Micro Enterprises and Small Enterprises	545.87	87.68
- Total Outstanding dues of creditors other than Micro Enterprises and Small Enterprises	26,656.22	26,083.14
iii) Others	9,826.67	10,124.91
(b) Other Current Liabilities	1,203.28	919.70
(c) Provisions	559.57	413.87
Total Current Liabilities	38,791.61	46,449.14
TOTAL EQUITY AND LIABILITIES	1,19,821.00	1,18,802.32

Standalone Borrowings

Rs. In Lakhs

	As on	As on	Increase /
Particulars	31-03-2021	31-03-2020	(Decrease)
Long Term Borrowings	22,983.45	25,508.93	(2,525.48)
Short Term Borrowings	-	8,819.84	(8,819.84)
Total	22,983.45	34,328.77	(11,345.32)

Total Income from Continued Operations – Q4 & FY21(Consolidated)

Rs. In Lakhs

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Revenue from Operations	42,970.26	26,909.55
Other Operating Revenue	1,646.57	1,390.00
Other Income	109.12	1117.13
Total Revenue	44,725.95	29,416.68

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
	1,35,894.18	1,17,814.76
	5,417.15	6,128.12
	783.97	1486.46
	1,42,095.30	1,25,429.34

Profit from Continued Operations - Q4 & FY21 (Consolidated)

Rs. In Lakhs

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Profit / (Loss) Before Tax	2,323.73	397.53
Add : Amortisation of Intangibles	557.77	562.43
Profit from Operations before other Comprehensive Income	2,881.50	959.96
Other Comprehensive Income / (Expense)	(225.21)	283.97
Profit / (Loss) from Operations	2,656.29	1,243.93

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
	4,739.79	(2,950.18)
	2,262.07	2,262.07
	7,001.86	(688.11)
	18.23	322.67
	7,020.09	(365.44)

EBITDA

	2020-21 (Jan - Mar)	2019-20 (Jan - Mar)
Profit / (Loss) from Operations	2,656.29	1,243.93
Depreciation	1,719.33	1,821.54
Interest	929.48	1,123.55
EBITDA	5,305.10	4,189.02
Revenue from Operations	42,970.26	26,909.55
EBITDA % on Revenue from Operations	12.35%	15.57%

	2020-21 (Apr - Mar)	2019-20 (Apr - Mar)
	7,020.09	(365.44)
	7,156.96	7,331.56
	4,305.71	3,381.71
	18,482.76	10,347.83
	1,35,894.18	1,17,814.76
	13.60%	8.78%

Consolidated Borrowings

Rs. In Lakhs

	As on	As on	Increase /
Particulars	31-03-2021	31-03-2020	(Decrease)
Long Term Borrowings	24,485.85	23,830.36	655.49
Short Term Borrowings	309.70	13,310.91	(13,001.21)
Total	24,795.55	37,141.27	(12,345.72)

BUSINESS INFORMATION



PRICOL LIMITED
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Quarterly Sales JAN - MAR 2019-20 Vs 2020-21

Values & Numbers in Lakhs

QUARTERLY SALES FROM JAN - MAR 2019-20 Vs 2020-21						
Segment	Vehicle Production - Quantity			Pricol Sales - Value		
	Jan to Mar 2019-20	Jan to Mar 2020-21	Growth	Jan to Mar 2019-20	Jan to Mar 2020-21	Growth
	A	B	%	C	D	%
2 / 3 Wheelers	46.26	58.56	26.59%	16214	26485	63.34%
4 Wheelers	7.90	9.71	22.96%	1359	1933	42.21%
Commercial Vehicles	1.58	2.35	48.73%	1449	4396	203.40%
Off Road Vehicles	1.17	1.63	39.32%	1573	2368	50.57%
Tractors	1.45	2.38	64.80%	1187	1839	54.92%
OEM	58.35	74.63	27.90%	21782	37020	69.96%
After Market + Xenos				1240	1694	36.65%
Asset Management Solutions				403	352	-12.62%
SCMS - Domestic				252	302	19.87%
Exports				2720	2775	2.02%
Others				-57	-49	-15.24%
Total				26339	42094	59.82%

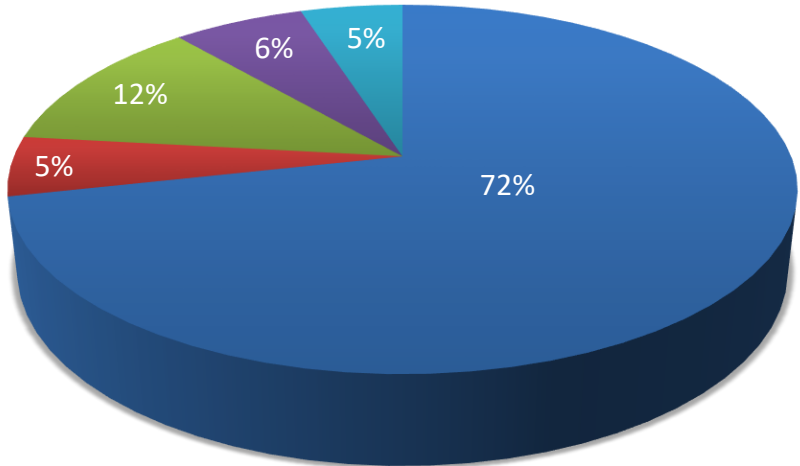
Vehicle Production : 2019 & 2020 - SIAM Data.

Vehicle Production : Tractor volumes - ACMA Data.



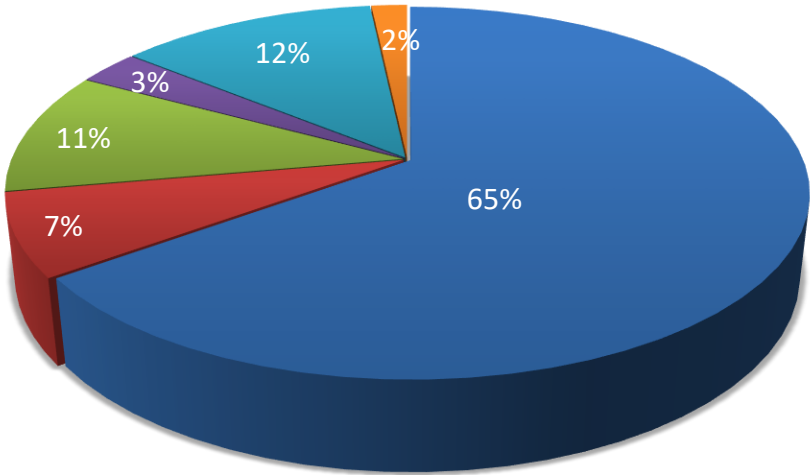
Quarterly Sales JAN - MAR 2020-21 (Category-Wise)

Segment-Wise



- 2 / 3 Wheelers
- 4 Wheelers
- Commercial Vehicles
- Off Road Vehicles
- Tractors

Product-Wise



- Driver Information System
- Oil Pump
- Fuel Pump Module
- Fuel Level Sensor
- Chain Tensioner
- Purge Control Valve Assembly

Yearly Sales APR – MAR 2019-20 Vs 2020-21

Values & Numbers in Lakhs

SALES FROM APR TO MAR 2019-20 Vs 2020-21						
Segment	Vehicle Production - Quantity			Pricol Sales - Value		
	Apr to Mar 2019-20	Apr to Mar 2020-21	Growth	Apr to Mar 2019-20	Apr to Mar 2020-21	Growth
	A	B	%	C	D	%
2 / 3 Wheelers	221.66	189.61	-14.46%	77090	88525	14.83%
4 Wheelers	34.25	30.62	-10.60%	4028	5544	37.64%
Commercial Vehicles	7.57	6.25	-17.44%	6229	10636	70.75%
Off Road Vehicles	4.20	4.88	16.19%	5165	6348	22.90%
Tractors	6.95	8.99	29.35%	5158	5897	14.33%
OEM	274.63	240.35	-12.48%	97670	116950	19.74%
After Market + Xenos				5326	5327	0.03%
Asset Management Solutions				897	1168	30.22%
SCMS - Domestic				1430	1042	-27.12%
Exports				8418	9115	8.28%
Others				164	12	-92.69%
Total				113905	133615	17.30%

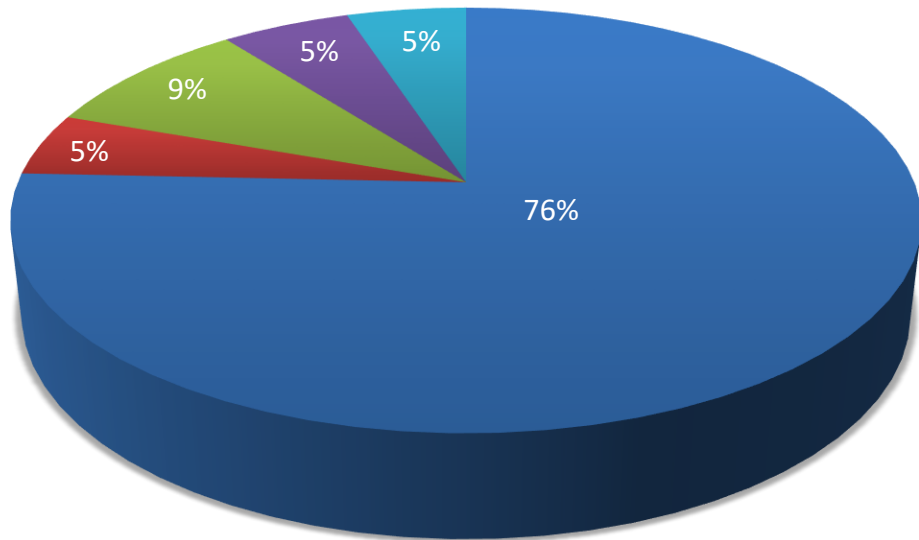
Vehicle Production : 2019 & 2020 - SIAM Data.

Vehicle Production : Tractor volumes - ACMA Data.



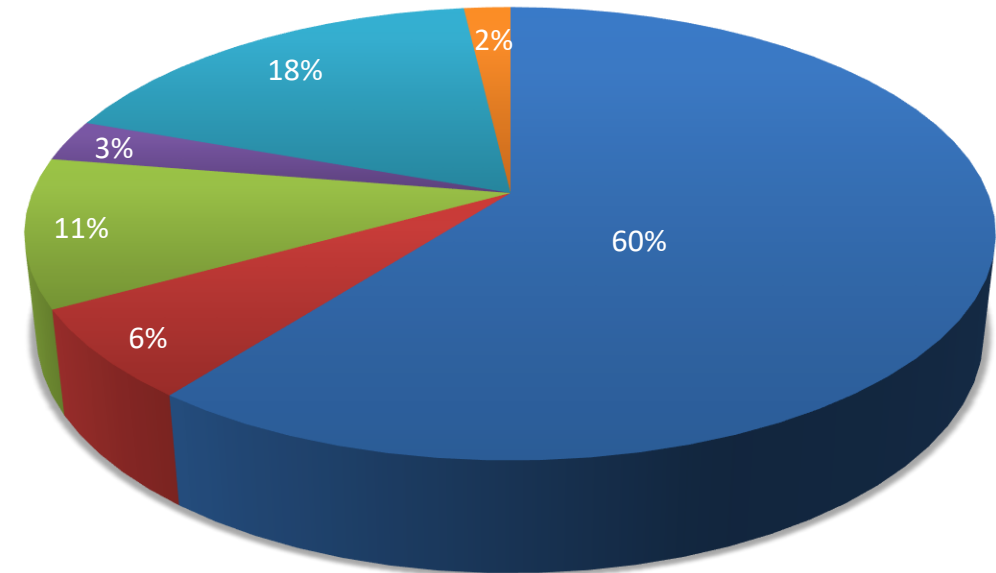
Yearly Sales APR – MAR 2020-21 (Category-Wise)

Segment-Wise



- 2 / 3 Wheelers
- 4 Wheelers
- Commercial Vehicles
- Off Road Vehicles
- Tractors

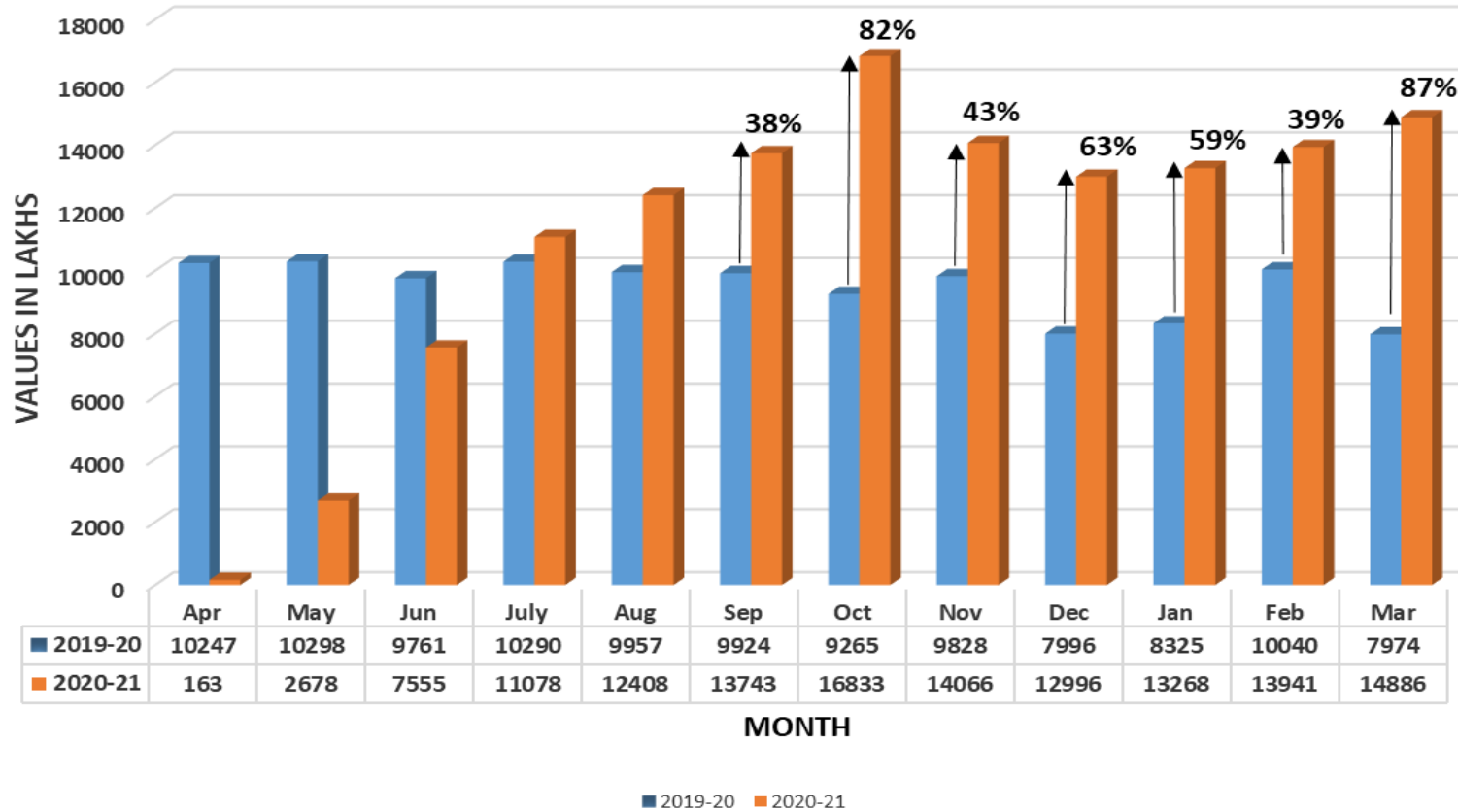
Product-Wise



- Driver Information System
- Oil Pump
- Fuel Pump Module
- Fuel Level Sensor
- Chain Tensioner
- Purge Control Valve Assembly

Pricol Sales 2019-20 Vs 2020-21

PRICOL SALES 2019-20 Vs 2020-21



New Business Wins

2W Electronic Digital Clusters



HMCL

(Glamour)



Bajaj

(Husqvarna)



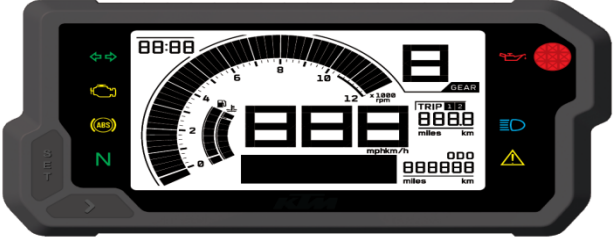
HMCL

(Super Splendor)



TVS

(Star City Plus)



Bajaj

(Adventure 250)



HMCL

(Extreme)

2W: Connected, LCD & TFT and EV Clusters



Suzuki

(Access 125 & Burgman)



TVS

(iQube – Electric Scooter – TFT Cluster)



TVS

(Apache RR 310 – TFT Cluster)



TVS

(N-Torq)

PV and CV Clusters



Ashok Leyland Limited

(New Generation CVs)



TATA Motors

(Tiago, Tigor, Nexon)



Force Motors

(Traveller)



VE Commercial Vehicles

(Pro Series)

Pumps and Mechanical Products

Fuel pumps



TVS

(Jupiter, Pep+)



HMCL

(Passion Pro, Glamour, Extreme)

Electronic purge valve



HMCL

(All BSVI Motorcycles & Scooters)

Export Launches



MOROCCO



EV – Instrument Cluster

Export Launches



UK



Warning Cluster



TFT Instrument Cluster

Türk Traktör



TURKEY



Instrument Cluster

Export Launches



USA



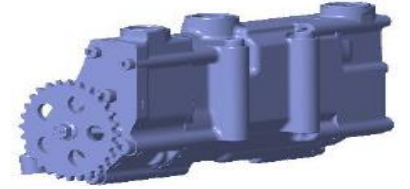
G4 Water Pump



MY19 oil pump



AST Oil Pump



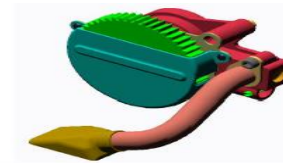
Marauder Oil Pump



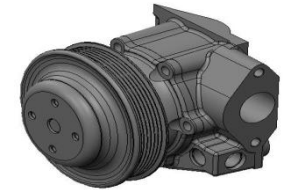
USA



PD Oil pump



Commando Oil pump



PD water pump



Export Launches



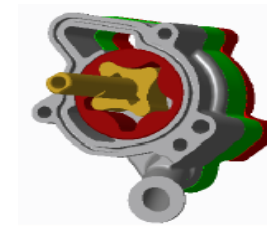
USA



LPSD Water Pumps



USA



LaMotta Oil pump



LaMotta Water pump

Export Launches



Italy



Oil Pump



Germany



K67 Water/ Oil pump

Export Launches



Thailand



Speed Sensor



Germany



Speed Sensor

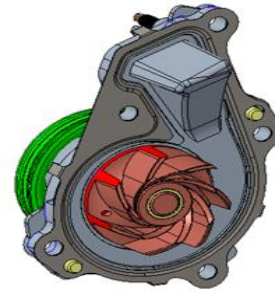
Domestic Launches

STELLANTIS

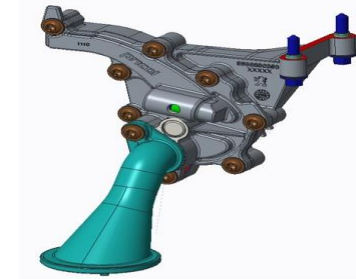
PSA PEUGEOT CITROËN



PEUGEOT CITROËN



2L Water Pump



Conventional Gerotor Oil Pump 2L Engine

Domestic Launches

STELLANTIS

PSA PEUGEOT CITROËN



PEUGEOT CITROËN



Variable Displacement - Vane type
Oil Pump (1.2 L Turbo Engine)

SECTOR REVIEW



PRICOL LIMITED
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Automotive Industry

- With the advent of COVID-10 Pandemic, the world economy suffered a great deal and auto sector was not left untouched. Bearing the brunt of the strict worldwide lockdown the auto sector witnessed unprecedented slowdown which consequently led to salary cuts and ultimately layoffs.
- After a year today while many countries have opened up although either partially or with strict guidelines in order to prevent the spread of COVID-19; India is witnessing the second wave which has proved to be more dangerous than the first one wherein the no of deaths are very high as compared to the first one.
- OEMs have decided either to shut down their plants for a few days or have opted to extend their annual maintenance which ultimately results in production loss. Furthermore, on the sales front as well the picture looks grim as the dealerships are closed and no festive season sales; which normally is the case. So, although the actual reported numbers might show growth on a Y-o-Y basis this is mainly due to the favorable base effect.
- The vaccination drive may provide some cushion to the spread of COVID-19; however if the paucity of vaccine persists and the vaccination drives gets stretched this shall have repercussions on the auto industry.
- All the above factors leads to downward revision of estimates of the figures.

Source: ICRA May 2021 Report

Automotive Industry

➤ Shortage of Semiconductors

Global resurgence of the automotive industry and consumer electronics has caused a shortage of crucial semiconductors that has impacted raw material availability and trend is expected to continue.

➤ Steel

Steel Prices are witnessing an up cycle and are at an all time high which has significantly increased the input cost for the auto sector. Furthermore the prices are not likely to soften in the near term

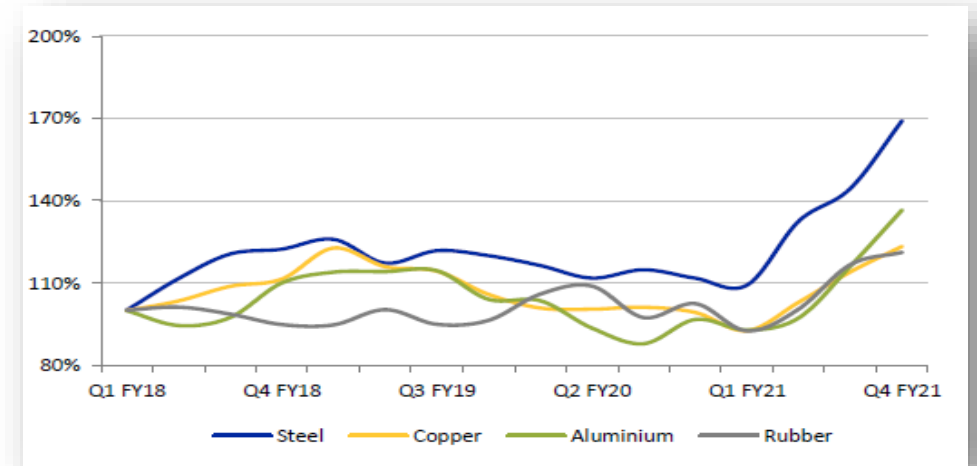
➤ Aluminum

The aluminum prices are also at a multi-year high adding to the raw material cost incurred. These levels are expected to sustain and are unlikely to come down in the near term

➤ Copper

Even the copper prices which are trading at current highs are expected to sustain for the next few months before softening; FY2022 to be at a multi-year high.

Commodity Price Trend in the Last Four Years



Source: ACMA April 2021 and ICRA May 2021 Report

Automotive Industry

- On the bright side, with two consecutive years of double digit decline, the domestic automotive industry, had been reporting healthy sequential recovery trends over the second half of FY2021, post relaxation of the lockdown-related restrictions
- Strong sequential improvement in M&HCV sales to continue, driven by rise in e-commerce, agriculture, infrastructure, and mining activities. We expect the strongest recovery in the CV segment in FY2022 and FY2023, driven by improved economic activities, low interest rate regime, and better financing availability
- Post the relaxation of the restrictions we again expect the demand for 2 Wheelers, we which cater to a large extent, to witness a pent up demand as consumers will try to avoid public transport
- Auto and auto ancillary stocks have undergone a healthy retracement after a strong up move during CY20. Most of the stocks have held their key support despite a host of negative news flow owing to surging Covid-19 cases in India, thereby offering favorable risk reward.

Source: ICRA May 2021 Report



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Automobile Industry

- Commercial Vehicle segment to witness growth optically better due to favorable base effect after two years of sharp contraction
- As far as the Tractor Industry is concerned a normal monsoon, higher MSP, supported by enhancement government support and incentive schemes and a favorable crop outlook, shall be beneficial to the sales in this segment
- Sales estimates of Passenger Vehicles, Two wheelers, Tractors and Commercial Vehicles are expected to post an average of 15% over FY22

Source: ICRA May 2021 Report



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Two Wheelers

➤ Estimates

The estimates for the two wheeler segment have been revised upwards by 10-15%

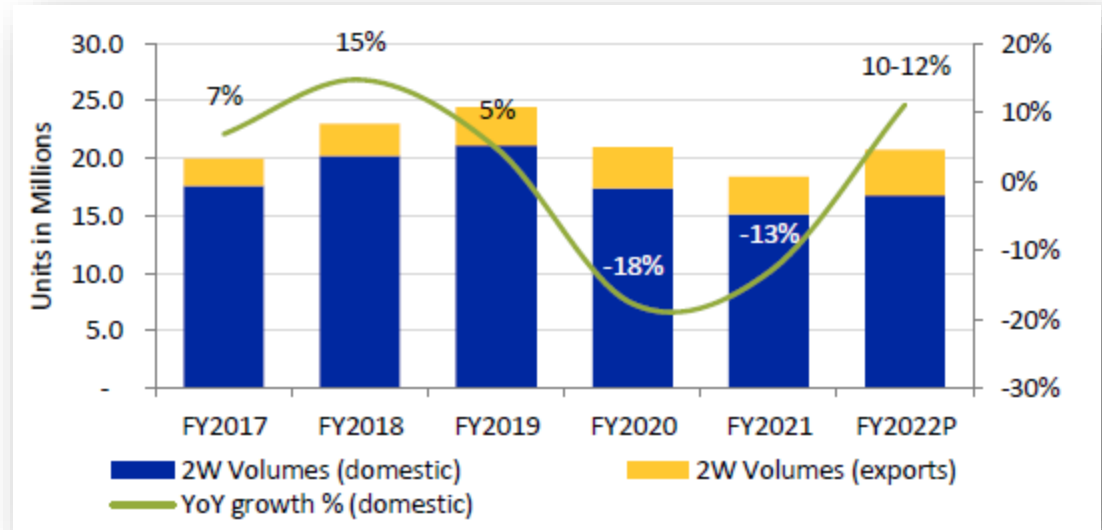
➤ Growth Drivers

- Preference for personal mobility in order to avoid public transport
- Reinstatement of salary cuts and increments
- Buoyant export demand

➤ Challenges

- Spread of pandemic to semi-urban and rural areas
- High inventory levels at dealerships
- Liquidity Constraints at macro level
- Rising raw material costs

Industry Market – Growth Estimates



Source: ICRA May 2021 Report

Passenger Vehicles

Estimates

- Estimates revised downwards from 22-25% to 17-20%

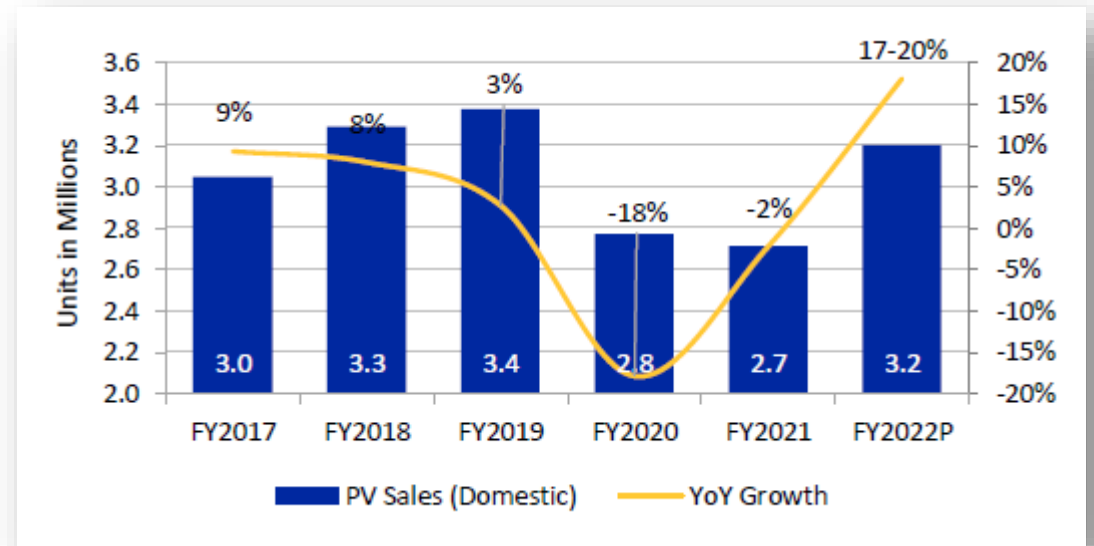
Growth Driver

- Preference for personal mobility due to continued need for social distancing
- Steady agri cash flows to aid rural demand
- Adequate financing availability

Challenges

- Temporary extended shut down of production at OEM level
- Disruption of the entire value chain of major industries in India, consequently affecting production of auto spares
- Reduced consumer demand owing to strict travel restrictions

Passenger Vehicle Industry Market -Growth Estimates



Source: ICRA May 2021 Report

Commercial Vehicles

➤ Estimates

- Estimates for commercial vehicles are revised downward by 10-15%

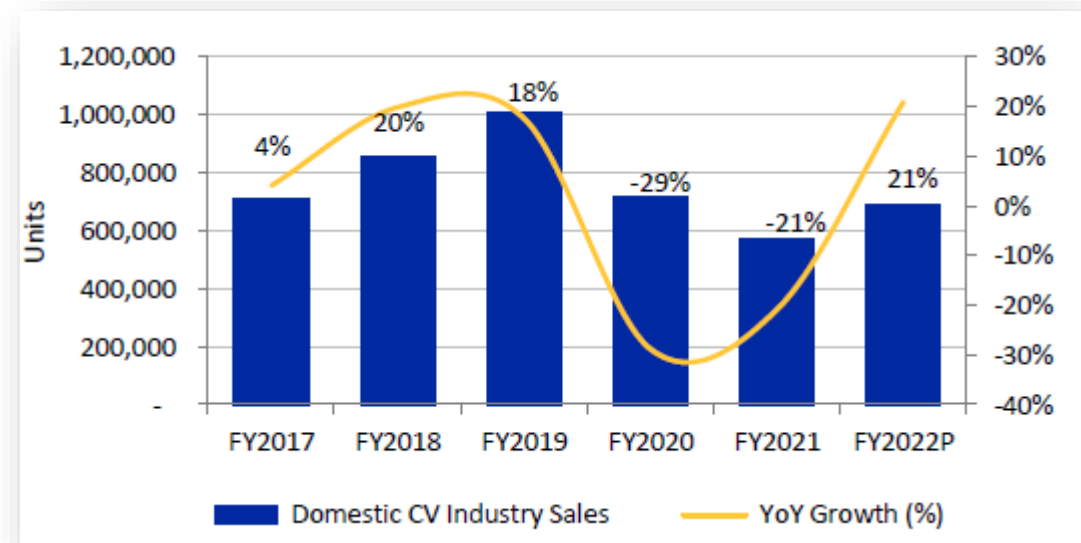
➤ Growth Driver

- Favorable base effect after two years of sharp contraction
- Demand from infrastructure vertical for medium & heavy commercial vehicles (M&HCVs) remains strong
- Increased last-mile transportation demand to support LCV (Truck)

➤ Challenges

- Hampered ecommerce sales, financing challenges and spread of pandemic to rural & semi urban areas
- Wipeout of seasonal demand from school, Continued work from home culture and weak tourism prospects

CV Industry Market -Growth Estimates



Source: ICRA May 2021 Report

Tractors

➤ Estimates

The estimates for the Tractors segment have been revised downwards to 1-4% from 4-6%

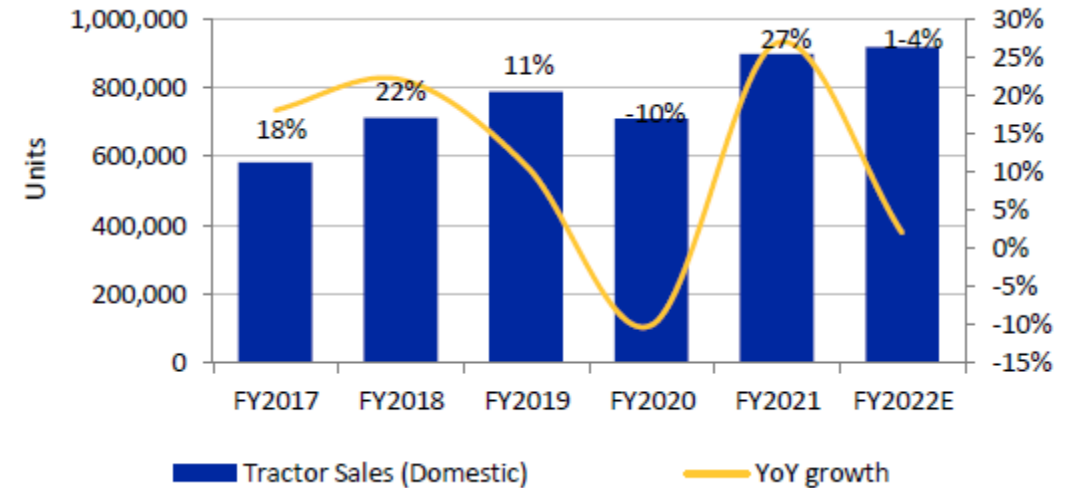
➤ Growth Drivers

- Normal Monsoon
- Favourable crop outlook
- Higher MSP Prices
- Ample finance available

➤ Challenges

- Spread of pandemic to semi-urban and rural areas
- High base impact-FY2021 ended with the highest ever industry sales
- Unfavourable monsoon

Tractor Industry Market -Growth Estimates



Source: ICRA May 2021 Report

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