

40 YEARS OF CREATING #infinitepossibilities

SKIPPER Limited GOODNESS LEADS



GOODNESS LEADS

The intentions inside shape the actions outside! When we operate from a place of integrity, quality and big heartedness, we make a lasting deference in the world.

When goodness leads, great results follow!





LEADING AHEAD WITH GOODNESS

Established in 1981, Skipper Limited today is a USD 300 million company.

Skipper Limited is the largest manufacturer of Transmission & Distribution structures in India and among the top 10 globally.

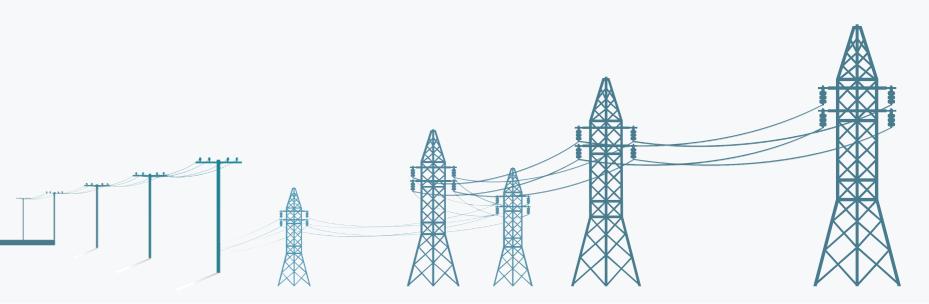
It is also a national powerhouse in the Polymer Pipes & Fittings business, and manufactures premium quality products under the brand name Skipper Pipes, which serves both the agricultural and plumbing sectors.

THE SKIPPER STORY.





The Largest Tower manufacturer in India



GOODNESS LEADS

SKIPPER

VISION

To produce world- class quality products ensuring robust National Infrastructure development and making India the preferred sourcing hub for Global Infrastructure needs.



MISSION

Our mission is guided by our intent of making a difference and maintaining our respected place in the industry. Continue focusing on sectors of power and water as per contemporary global demand

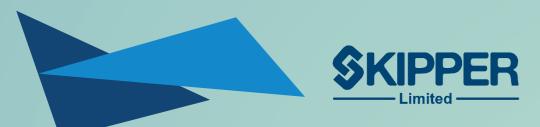


Ensure greater scale and technology for a longer duration of existence Continue adding value added products and services to our portfolio



Continue tapping newer geographies to add on to existing countries

Reduce carbon footprints and evolve towards reduced consumption of hydrocarbons and non-conventional and renewable energy sources



ALWAYS A GOOD BET

At Skipper, our products are a true reflection of our goodness within. We employ the highest standards of manufacturing procedures and perform stringent quality checks, so that they do justice to the expectations you have from us.





EMPOWERING INDIA WITH A HEART OF GOODNESS **ENGINEERING DIVISION**

Our engineering division is dedicated in lighting up our world and powering it ahead towards a brighter future!

- **Power Transmission Towers**
- Transmission Line Monopoles lacksquare
- Light & Distribution Poles (Swaged, ${\color{black}\bullet}$ High Mast and Octagonal)
- Telecom Towers / Monopoles lacksquare
- **Railway Electrification Structures**
- Mild Steel and High Tensile Angles lacksquare
- Fasteners & Tower Accessories

OUR PRODUCTS



Transmission Towers

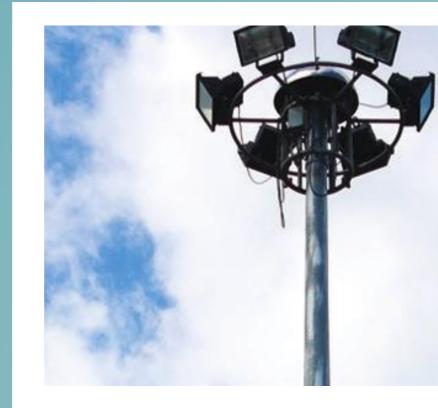


Transmission Line Monopole





Lighting & Distribution Poles



Highmasts





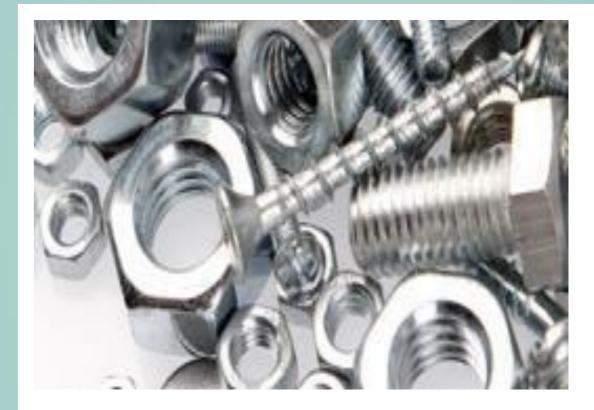
Angles

Railway Structures

OUR PRODUCTS



Telecom Tower



Fasteners





Polymer division helps bring the most crucial resource nearer to where it's needed!

Fittings

- 100% Lead Free UPVC Pipes & Fittings \bullet
- **CPVC** Pipes & Fittings \bullet
- SWR Pipes & Fittings ${\color{black}\bullet}$
- Borewell Pipes (Casing Pipes, Column lacksquarePipes & Ribbed Strainer Pipes)
- Agriculture Rigid Pipes & Fitting \bullet
- Underground Drainage Pipes lacksquare
- HDPE Pipes & Overhead Tanks lacksquare
- **CPVC & UPVC Solvent cement**
- Cisterns, Seat Covers and \bullet
- Bath Fittings & Accessories

OUR PRODUCTS







UPVC Pipes & Fittings





Rigid Pipes





SWR Pipes

Our Product Basket

OUR PRODUCTS

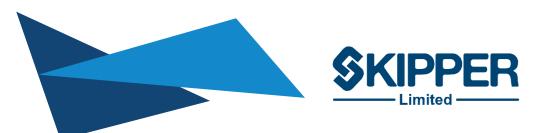


Casing Pipes



Column Pipes





STRONGER FOUNDATIONS TO A BETTER TOMORROW

INFRASTRUCTURE DIVISION

With our Infrastructure division we are helping shape our world the good way!

- Transmission Line EPC
- Railway Electrification
- Underground Utility Laying by HDD (Horizontal Directional Drilling)
- Water EPC

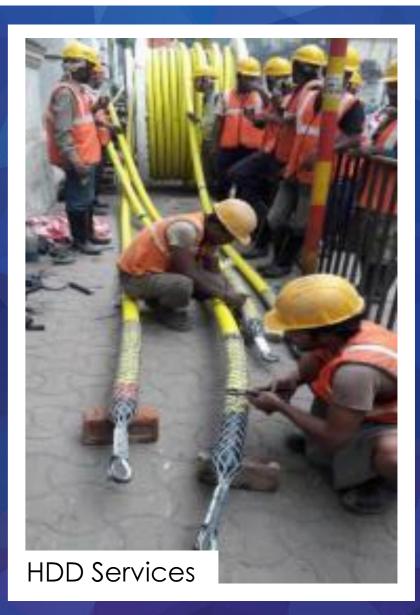




OUR SERVICES



Transmission Line EPC







BRINGING THE GOOD TOGETHER BACKWARD INTEGRATION

We believe that all good things should integrate together to create something exceptional.

Hence, when it comes to Power Transmission Towers & Poles, Skipper undertakes each and every activity in the entire value chain from Angle Rolling to Fabrication & Galvanising, Proto Assembly, Load Testing and even EPC line construction.

Skipper's backward integration enables cost optimisation, swifter time-to-market, high quality control, timely dispatch, superior customer service, and a much lower exposure to commodity price fluctuations...



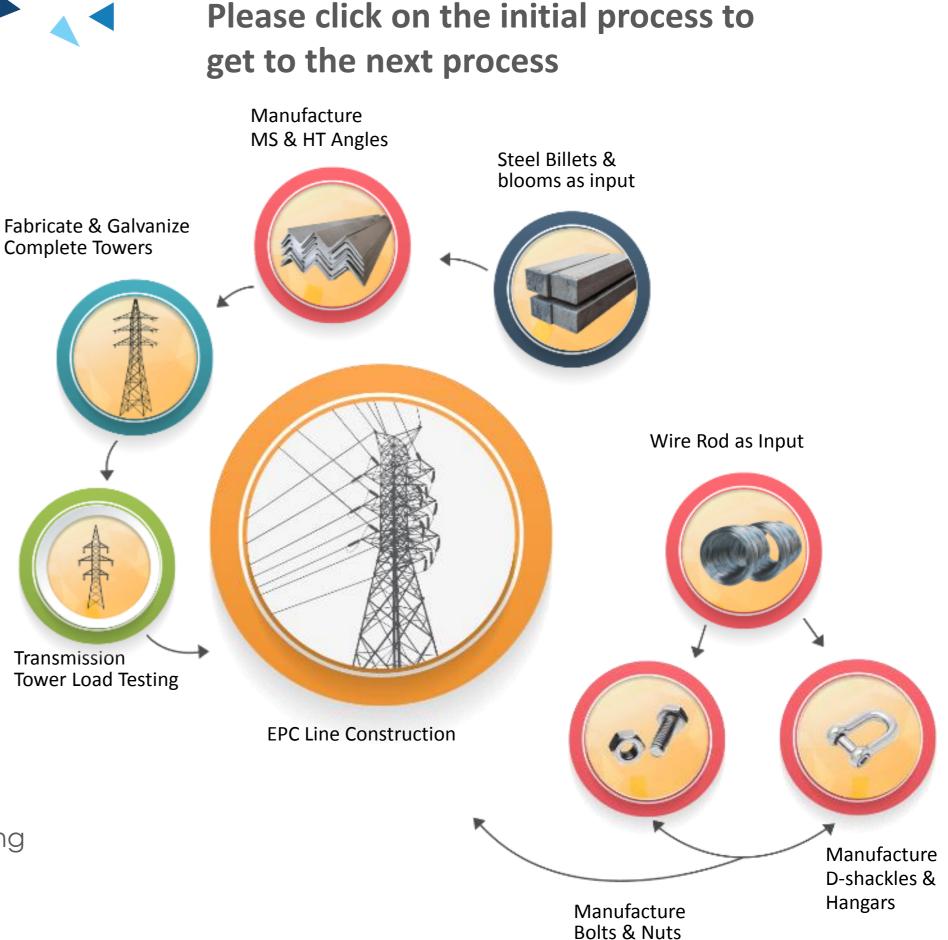


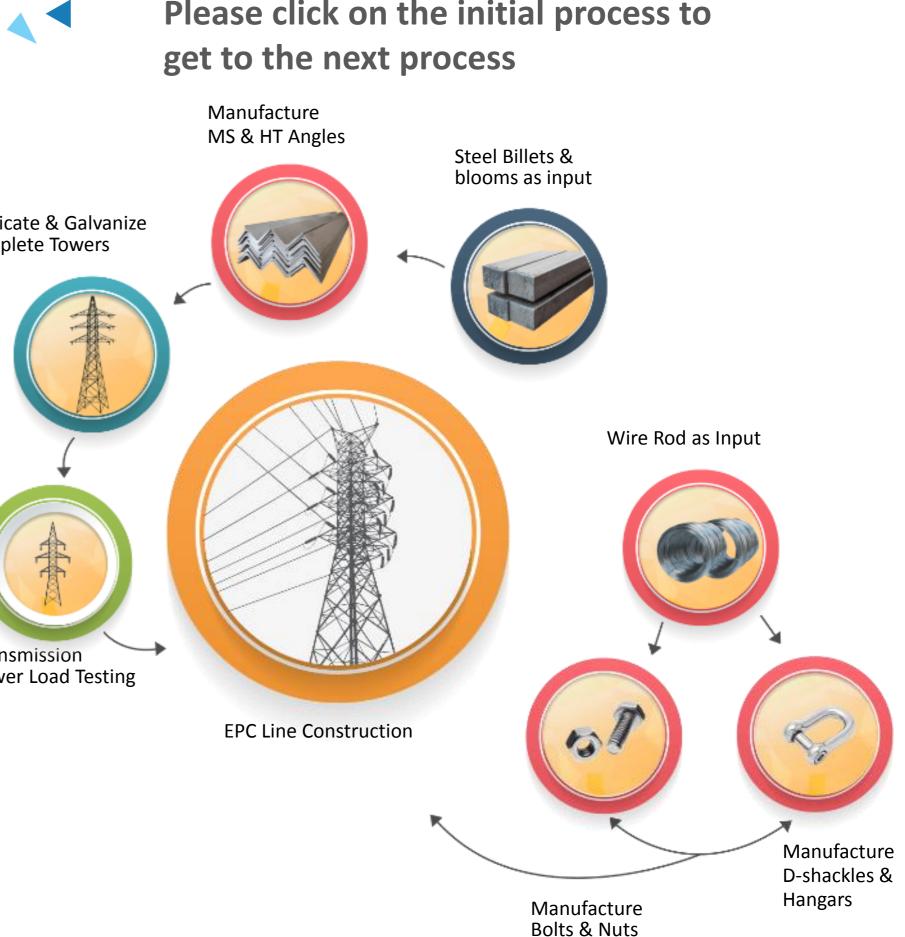
CORE COMPETENCIES **OUR VALUE CHAIN**

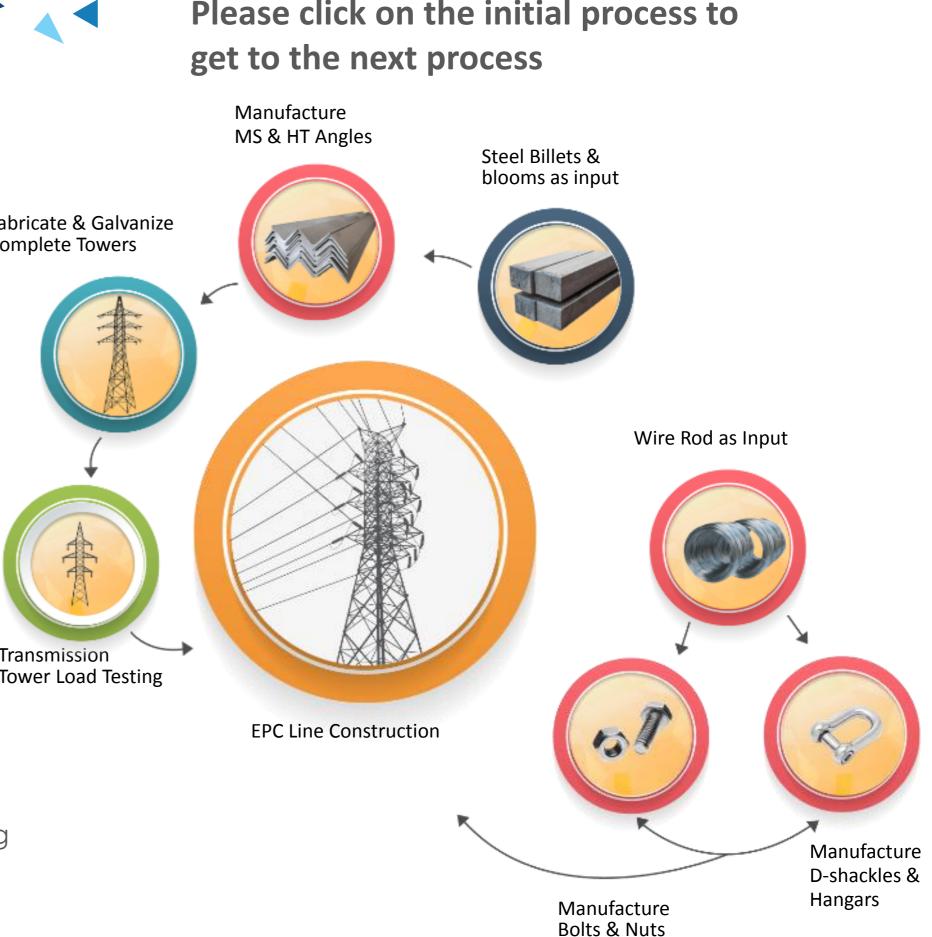
CONTEMPORARY TECHNOLOGY: Possesses automated state-of-the-art equipment

SKIPPER

- **VALUE ENGINEERING:** Engineering and design excellence helps optimize product and process costs
- **ONE STOP SHOP:** In house availability of products, accessories and technical services
- **SUPPORT SYSTEM:** Strategic plant locations in East enables adequate power availability, proximity to Kolkata port and cost-effective labor
 - **SCALE:** Power Grid approved and ISO certified plants with large manufacturing capacities enables to participate in large project size orders
 - **TEST BED:** The Company's tower testing facility is one of the largest in India and first of its kind in Eastern India. The center is capable of full-scale load testing, a reliable tool for validating the structural design









Skipper is among the handful in its sector to invest heavily in research and innovation. The Company's R&D department is approved by Dept. of Scientific and Industrial Research (DSIR), Govt. Of India.

The Center reinforcing the Company's strong commitment to innovative products and solution for its customers. The R&D Unit will not only facilitate in house load testing and proto type testing but will also help improve and customize the tower design resulting in customer satisfaction.



Transmission Line Tower Testing Station

Skipper boasts of the largest Tower & Monopole Load Testing Station in India, which is also one of the largest in the world.

The state of art Transmission Line Tower Testing Station is spread across 14acres of land in Howrah , WB

Capable of Full scale load testing, a reliable tool for validating the structural design NABL Accredited Testing Laboratory (Certificate No. TC-9011)

The facility is designed to Test all kinds of Lattice Towers, Monopoles & Guyed Towers with World Class Parameters One of the largest Testing facilities of India and first of its kind in Eastern India

Ultimate Destination for OHTL Contractors and Manufacturers for Prototype Testing





765 kV POWER TRANSMISSION TOWER



1981

 Our Company was incorporated as Skipper
Investments
Limited; we began
our journey
by manufacturing
Hamilton Poles.



 The Company's name was changed to Skipper Steels
Ltd and it diversified into manufacturing towers and masts.



The Company set up an LPG cylinder unit.



Tube mill was set up.



Set up its first galvanizing plant.



2006

- Crossed **Rs. 1 billion** in revenue.
- Got Powergrid's approval for tower units and received the first order of 400kV towers (the highest voltage level at

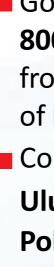
that time).

Entered into a manufacturing tie-up with Ramboll, Denmark - the world's largest tower designing company.



Conversion of tower production process from manual to automatic CNC.





2009

Got India's first order for 800kV transmission towers from Power Grid Corporation of India Limited (PGCIL). Commissioned the Uluberia unit with first Polymer unit and India's first doubleside Tube GI plant..

2010

Entered into backward integration of two major product verticals tubes and towers, by way of a Strip mill and Angle mill, respectively.



2011

Focus on broader and diversified product verticals.

2013

- Crossed **Rs.10 billion** in revenue.
- Alliance agreement with South America's largest TSO for exclusive supply to its transmission projects.

2015

- **Transmission Tower**
- award by CNBC TV-18.
- Got listed on NSE in May 2015.
- Entered into an alliance with Sekisui Chemicals Co Ltd of Japan.

Awarded 'Fastest Growing **Manufacturing Company'**



- Won the 'Best Industry in Water Resources Sector' award by CBIP. Recognized as 'Star Performer' by EEPC.
- Recognized 'Largest Tower Supplier' by PGCIL.
- Became one of India's pioneer companies in production of **Transmission Monopoles.**
- Commissioned our first Transmission **line EPC project** – 400 kV Punchkula Patiala for Powergrid Corporation.



- Emerged as the largest manufacturer of T&D structures in India.
 - Commissioned a second Guwahati
- plant in Palashbari. Given Largest Tower Supplier Award by PGCIL (second time).

2018

- Entered into a joint venture with Metzerplas for microirrigation
- products.
 - Ventured into new Product categories such
- as railway electrification etc. Won the 'Largest Tower
- Supplier' award from PGCIL For the third successive time.

2019

- kV monopole.

The company wins the prestigious SKOCH Order of Merit West Bengal.

Best Employee Engagement Strategy by ET Now. Produced and Type Tested India's first 765



- Dept. of Scientific and Industrial Re- search (DSIR), Govt. Of India ap- proves and recognizes In House R&D Center.
- Ranked 14 in Dream Companies To Work For presented by ET Now.

The company commissioned the largest Tower & Monopole Load Testing Station in India, which is also one of the largestin the world.



FROM GOOD TO BETTER OUR COMMITMENT TOWARDS EXCELLENCE

For us at Skipper, excellence is not an ideal – it's our way of life. We have always preferred good quality over quantity and we strive to keep up our high standards not just in our products but in the people we employ, the customer service we provide and the goals we set for global growth.

OUT COMMITMENT TOWARDS EXCELLENCE





A GOOD ROUND OF APPLAUSE FOR **OUR AWARDS & QUALITY CERTIFICATIONS**

- Bureau of Indian Standards (ISI)
- ISO 9001, ISO 14001, ISO 18001
- Power Grid Corporation of India Limited (PGCIL)
- Egyptian Electricity Transmission Company (EETC)
- Bhutan Power Corporation
- Major State Electricity Board of India (SEBs)
- Budcentral-Certificate of Conformity
- Kenya Transmission Company (KETRACO)
- Transmission Company of Nigeria (TCN)
- National Grid Corporation of Philippines (NGCP)
- Ministry of Railways (RDSO)
- Damodar Valley Corporation
- Saudi Electric Company

- The Jordanian Electric Power Company Ltd.,
 - Amman-Jordan
- RETIE, Colombia
- UKSEPRO
- LAPEM
- Transmission Corporation of Andhra Pradesh Limited (APTRANSCO)
- Odisha Power Transmission Corporation Limited (OPTCL)
- The Karnataka Power **Transmission Corporation** Limited (KPTCL)
- The Canadian Welding Bureau (CWB)
- CE Europe



OUR CAPACITIES

SKIPPER

Location	Engineering Product (MTPA)	Po Fit (M
Uluberia – Kolkata (WB)	1,30,000	44
Unit 1 – Kolkata (WB)	104000	
BCTL – Kolkata (WB)	36,000	
Guwahati- Assam	30,000	7,0
Total- Capacity	3,00,000	51

olymer Pipes & ttings Products /ITPA)	
4,000	
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1,000	

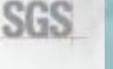




AWARDS & QUALITY CERTIFICATIONS







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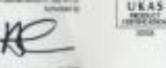
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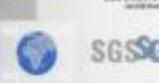
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RECENT AWARDS



AWARD: THE LARGEST TOWER SUPPLIER FOR 3rd CONSECUTIVE YEAR GIVEN BY: POWER GRID CORPORATION OF INDIA LTD. (PGCIL)



AWARD: EMERGING POWER EPC PLAYER GIVEN BY: EPC WORLD



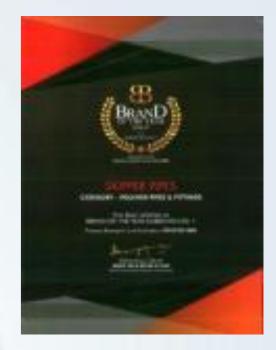
AWARD: MOST VALUABLE CONTRIBUTION TO POWER INDUSTRY GIVEN BY: ET EDGE



AWARD: STAR PERFORMER AWARD FOR THE YEAR 2015-16 GIVEN BY: EEPC INDIA



AWARD: GLOBAL HR EXCELLENCE GIVEN BY: WORLD HRD CONGRESS



AWARD: NO. 1 EMERGING BRAND IN POLYMER PIPES & FITTINGS GIVEN BY: WCRC



AWARD: THE BEST POLYMER BRAND GIVEN BY: CONSTRICTION TIMES



AWARD: MOST ETHICAL COMPANY GIVEN BY: WORLD CSR DAY



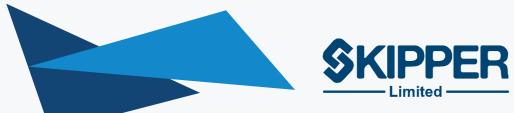
A GOOD LOOK AT OUR FACILITY HIGHLIGHTS

4 power grid approved Transmission tower & poles manufacturing plants with a combined Capacity of 300,000 MTPA. In – house Designing and preengineering Dept.

> MS & HT angle rolling (upto 200x200x25)

ensuring all time availability of raw materials More than 57 CNC operated production lines imported from Germany, Italy & China 7 in house galvanising units with plant size up to 14 mtr and an annual galvanising capacity of handling over 2.5 lakh MT.

DSIR Approved R&D Center and inhouse Transmission Line Tower Testing Station



A GOOD LOOK AT OUR SCALE & SIZE



India's largest and among the world's largest Integrated T&D Structure manufacturing companies.



Delivered transmission tower supply projects with detailed customization and critical specifications.

SCALE & SIZE



Amongst the largest manufacturers of Lighting and Distribution poles in India and pioneers of setting up Monopoles in the country



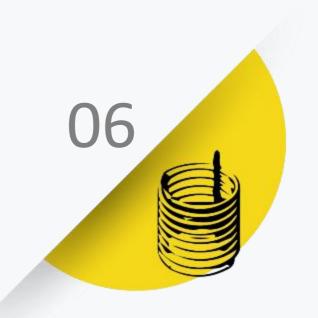
A GOOD LOOK AT OUR SCALE & SIZE



A fully integrated global EPC major. Services include tower design, tower testing, manufacturing, and onsite construction. Massive distribution network across pan India with over 5000+ touchpoints for polymer pipe business.

SCALE & SIZE





End- to- end integrated Tube solution provider from black tube rolling to galvanizing of tubes to tubular fabrication.



BEING TECHNOLOGICALLY GOOD **IT- ENABLED**

The information technology wing captures information exhaustively on a real time basis. Every commercial transaction including purchase, production, inventory control, sales invoicing are carried out on various ERP platforms, diligently inducted into everyday process by the company.

Not only that our HR systems too are automated for easy employee experience. Special software called Adrenalin is implemented for single integrated solution for creating multiple business processes.

A GOOD LOOK AT OUR TECH FACILITIES





RISING UP A GOOD GRAPH OUR FINANCIALS

Due to a strong bottom-line focused approach, Skipper has consistently out- performed in the market place over several quarters with an industry best EBIDTA and Revenue growth. Our focus is to be consistently good at improving upon our margins and optimizing our operations costs.









OUR PRESENCE

Decades of thriving national & global spread of business to 40+ Countries

Establishing the template of a true entrepreneurial journey, **Skipper Limited has** grown from strength to strength in the last three-&-half decades as one of the leading & largest Indian companies in the Power **Transmission & Distribution-segment** with extensive global C 1 1 1

SOUTH AMERICA-Peru, Colombia, Chile EUROPE-UK, Spair MIDDLE EAST-Jordan Saudi Arabia, UAE

SOUTH AND SOUT EAST ASIA -Nepal, Bangladesh, Sri Lanka, Indonesia

PHILIPPINES

AFRICA-Kenya, Egypt, Ghana, Nigeria Zambia, Sierra Leone, Guinea, South Africa, Botswana

AUSTRALIA

THANK YOU



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