



Adani Transmission Limited
FY 2019 Results Presentation
28 May 2019



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FY 19 Highlights

Operational

Transmission

- Average Availability 99.8%
- Incentive earned Rs. 48 Cr
- Six Transmission projects of 2,084 Ckt km became operational.
- Increase in Revenue of Rs.141 Cr

Distribution:

- Distribution loss reduced by 1.7% post-acquisition

Financial

Consolidated:

- Operational EBITDA of Rs. 2,857 Cr. (Including Part Yr. of AEML)
- Comparable PAT of Rs. 629 Cr of FY19 , up 38% compared to Rs.457 Cr of FY 18
- Two international rating agencies -S&P & Fitch have moved to "stable" from 'negative' outlook

Transmission:

- Operational EBITDA up from Rs.1,944 Cr in FY18 to Rs.2,051 Cr in FY19

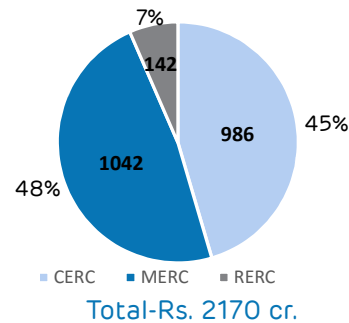
Distribution:

- EBITDA margin 19%

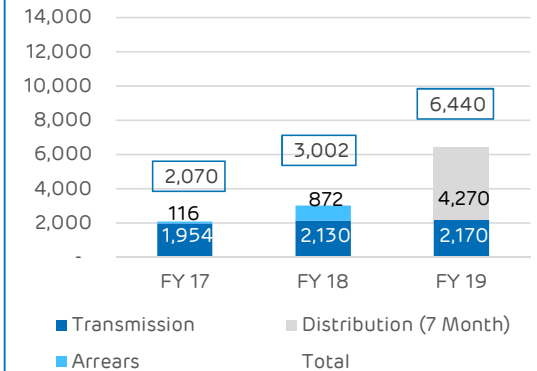
Strategic

- Mumbai distribution business acquisition (AEML) fully integrated after acquisition
- Won two new TBCB projects (Obra-C & Ghatampur) 1,510 ckt km
- Acquired one asset from KEC 343 ckt km

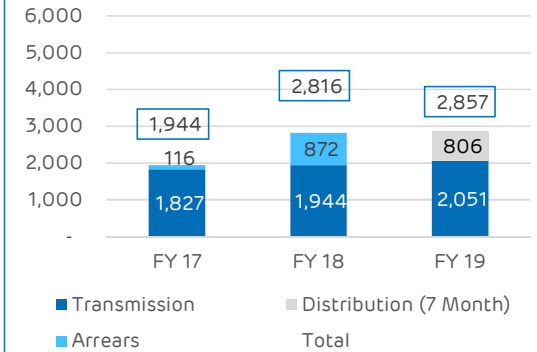
Transmission Business: Regulatory Revenue FY19



Revenue



Operational EBITDA



Safety and Sustainability



Safety

- Robust process of safety management, training and awareness
- Certified with OHSAS 18001:2007. Being upgraded to 45001.
- Over 16,000 man-hours of Safety awareness and training in FY 19
- Zero fatalities in FY 18 and FY 19
- LTI: Zero in FY 18, and one in FY 19



Communities

- Community engagement commences in early stages of projects, and runs through the entire project lifecycle
- CSR expenditure of Rs. 17.22 cr. during FY 19
- No community grievances or infringement of indigenous community rights reported in FY 18 and FY 19



Sustainability Reporting

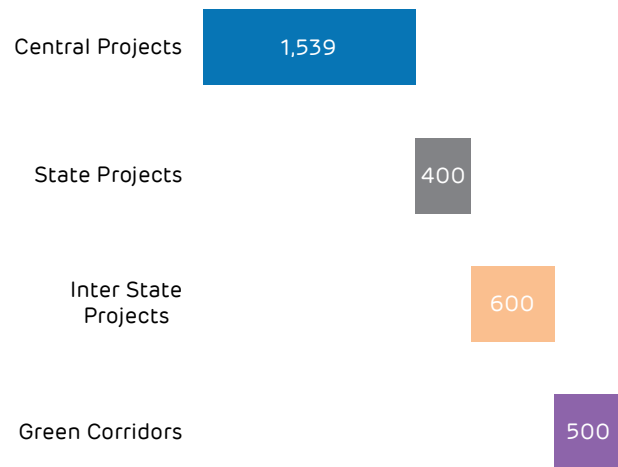
- Published Value Creation Report for FY 18 based on Integrated Reporting framework
- Disclosures were also mapped with IFC - Performance Standards and Sustainable Development Goals
- Tremendous focus on Governance and Transparency

Large Addressable Market for Private Players

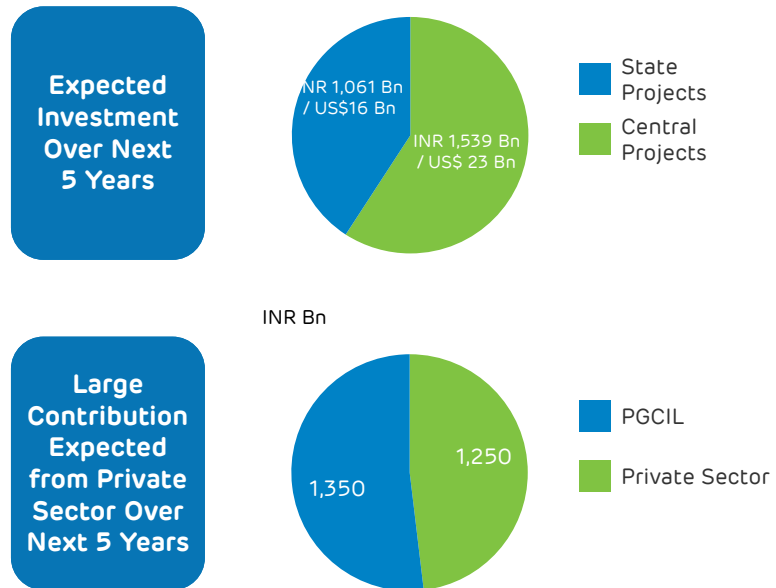
Government focus on transmission and distribution sector has opened up a large opportunity for the private sector over next 5 years.

Large Opportunity for Transmission Growth in the Next 5 years

(INR bn)



Significant Private Sector Contribution Expected in Central and State Projects



ATL is Well Positioned to Leverage the Large Private Sector Opportunity

Transmission Business: Project Updates

(Rs. In Cr.)

Recently commissioned Projects of 2,084 ckt km - Expected FY 20 revenue of Rs.621 cr.

Name	COD ^[1]	Transmission Length (ckt km)	Counterparty	Revenue FY 19	Revenue FY 20e
STL	25 th March 19	348	Centre	4	96
RRWTL	31 st March 19	611	Centre	-	220
CWRTL	One small element is pending	434	Centre	61	165
ATRL	27 th July 18	278	State	14	21
TPTL	8 th January 19	164	State	17	34
BPTL	29 th January 19	133	State	23	38
HPTL	20 th February 19	116	State	18	47
Total		2084		137	621

Under Construction Projects of 1,986 ckt km - Expected SCOD FY 20 and FY 21

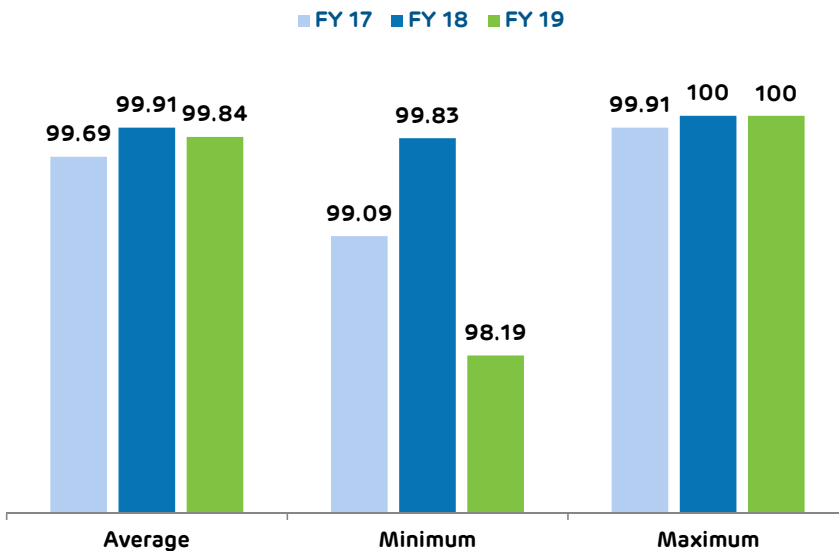
Name	SCOD ^[2]	Transmission Length (ckt km)	Counterparty
NKTL	March 20	268	Centre
FBTL	March 20	208	Centre
Obra-C Badaun	February 21	622	State
Ghatampur	March 21	888	State

Operational Highlights

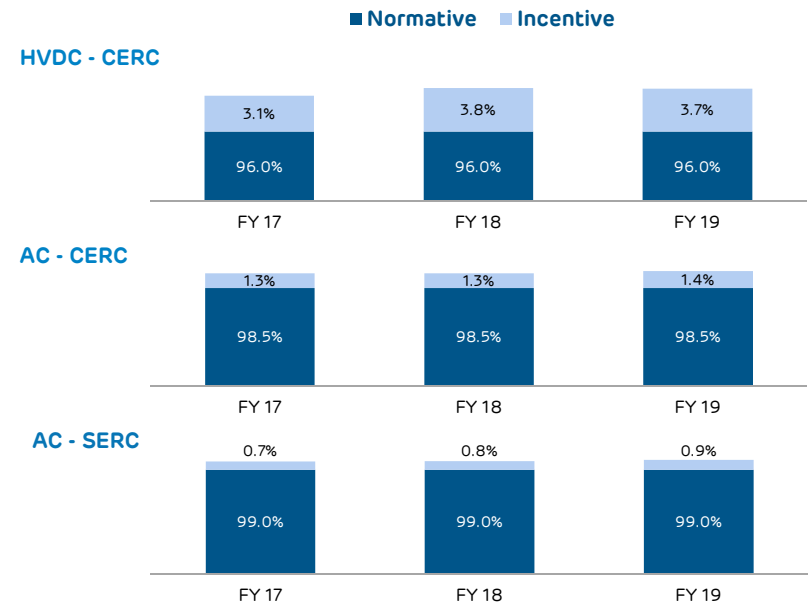
Transmission Business: Strong Capabilities Underscored by Operating Performance

Consistent performance across all operational assets with 99.8% availability and focus on incentive maximization

Availability Across Operational Assets (%) (Average, Min, Max)



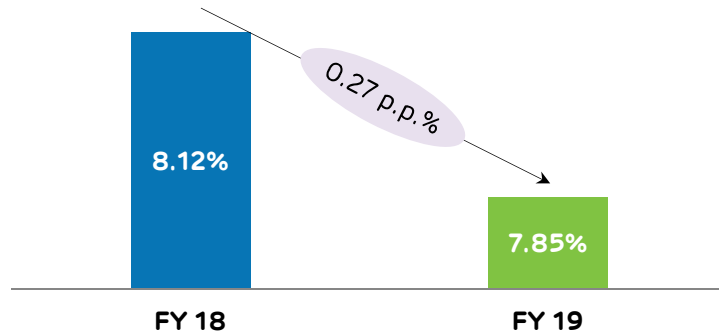
Focus on Maximizing Incentives(%)



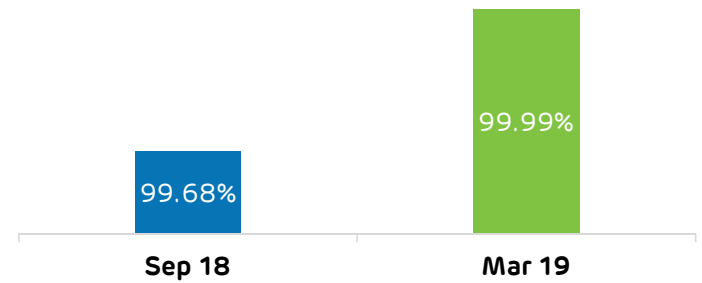
Strong operational capabilities and incentive focus help drive efficiencies and margins.

Distribution Business: Improvement in performance post acquisition

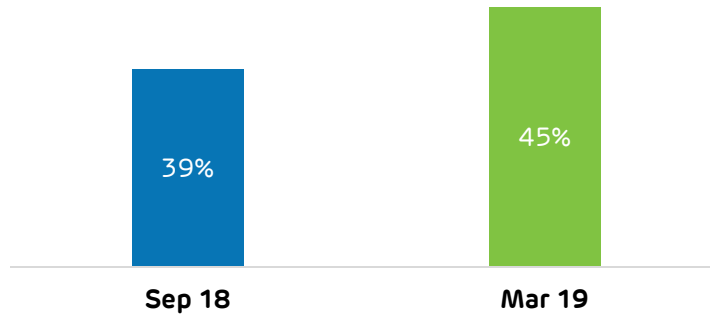
Distribution Loss (%)



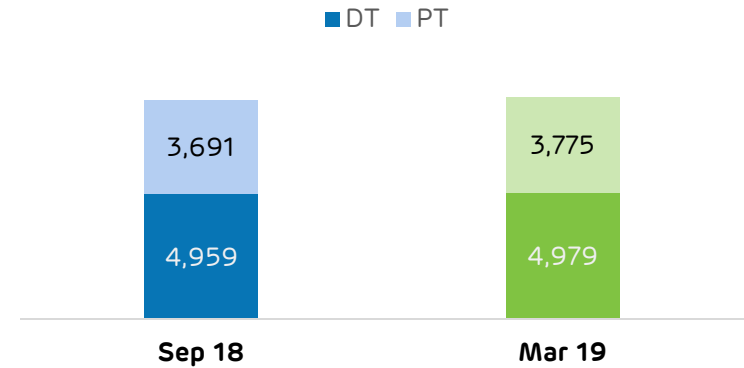
Supply Reliability (%)



E-payments (%)



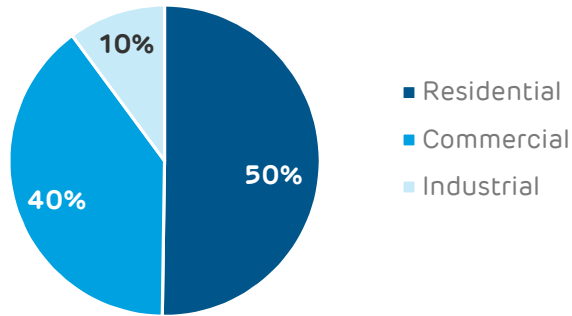
Transformer Capacity (MVA)



Distribution Business: Customer Mix

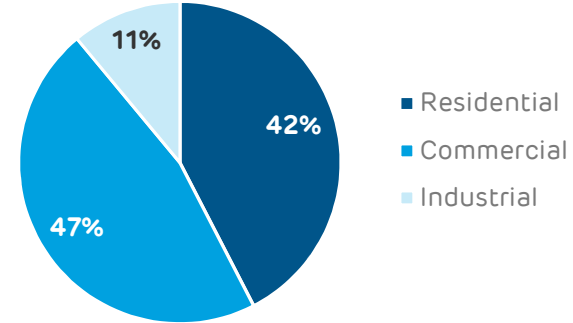
Customer-wise Sales

Total MUs sold (FY19): 8,376



Customer-wise Revenue Mix

Total Revenue (FY19): Rs. 6,322 cr



Financial Highlights

P&L: FY19 v FY18 (Consolidated)

(Rs. In Cr.)

Sr No.	Particulars	FY 2019 Transmission	FY 2019 Distribution	FY 2019 # (Consolidated)	FY 2018	% change
1	Revenue					
1.1	Income from Sale of Power and Transmission	2,212	4,270	6,482	2,093	
1.1.a	Income from Sale of Power and Transmission Charges	2,218	4,270	6,488	2,107	208%
1.1.b	Less: Rebate	6	-	6	14	
1.2	Incentive on availability	48	-	48	37	30%
2	Expenses:					
2.1	Operating Exp					
2.1.a	Operational & Maintenance Exp (inc. new SPVs)	129	650	778	144	
2.1.b	Power & Fuel Exp.	-	2,291	2,291	-	
2.1.c	New SPV's Operating Exp	15	-	15	-	
2.1.d	Employee Exp	65	523	588	42	
3=(1-2)	EBITDA (From Operation)	2,051	806	2,857	1,944	47%
	Operational EBITDA Margin	91%	19%	44%	91%	
4	Add:					
4.1	Sale of Traded Goods/EPC	833	10	842	816	
4.2	Construction income	19	-	19	110	
4.3	Carrying Cost	4	-	4	17	
4.4	Other Income	139	117	255	111	
5	Less:					
5.1	Purchase of Traded material	828	11	839	816	
5.2	CSR Exp	17	-	17	8	
5.3	Construction cost	14	-	14	102	
5.4	Bussiness Development Exp.	-	-	-	7	
6=(3+4-5)	EBITDA	2,186	922	3,107	2,064	

P&L : FY19 v FY18 (Consolidated) (cont..)

(Rs. In Cr.)

Sr No.	Particulars	FY 2019 Transmission	FY 2019 Distribution	FY 2019 # (Consolidated)	FY 2018	% change
6=(3+4-5)	EBITDA	2,186	922	3,107	2,064	
7	Finance Cost	854	537	1,391	886	
8	Depreciation	598	284	882	579	
9=(6-7-8)	PBT(before one time income)	733	101	834	599	39%
10	Arrears Income/Revenue reversal:	-90	96	6	872	
10.1	Regulatory Income/(Expense)	-	96	96	-	
10.2	Arrear Income/(Revenue Reversal as per True Up Order)	-90	-	-90	872	
11=(9-10)	PBT	643	197	840	1,472	
12.1	Tax	143	49	192	329	
12.2	Deferred Tax	13	76	89	-	
13=(11-12)	PAT	488	71	559	1,143	
14	Arrear /reversal Net off Tax	-70	-	-70	686	
15=(13-14)	Comparable PAT	558	71	629	457	38%

← One time income

P&L : FY19 v FY18 (Transmission Business)

(Rs. In Cr.)

(Rs in Crore)				
Sr No.	Particulars	FY 2019 (Actual)	FY 2018 (Actual)	% change
1	Revenue			
1.1	Net Transmission Charges	2,212	2,093	
1.1.a	Transmission Charges	2,218	2,107	5%
1.1.b	Less: Rebate	6	14	
1.2	Incentive on availability	48	37	
2	Expenses:			
2.1	Operating Exp			
2.1.a	Operational & Maintanance Exp.	129	144	
2.1.b	Power & Fuel Exp.	-	-	
2.1.b	WRSSS Assets Operating Exp	-	-	
2.1.b	New SPV's Operating Exp	15	-	
2.1.c	Employee Exp	65	42	
3=(1-2)	EBITDA (From Operation)	2,051	1,944	6%
	Operational EBITDA Margin	91%	91%	
4	Add:			
4.1	Sale of Traded Goods/EPC	833	816	
4.2	Construction income	19	110	
4.3	Carrying Cost	4	17	
4.4	Other Income	139	111	
5	Less:			
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5.4	Bussiness Development Exp.	-	7	
6=(3+4-5)	EBITDA	2,186	2,064	

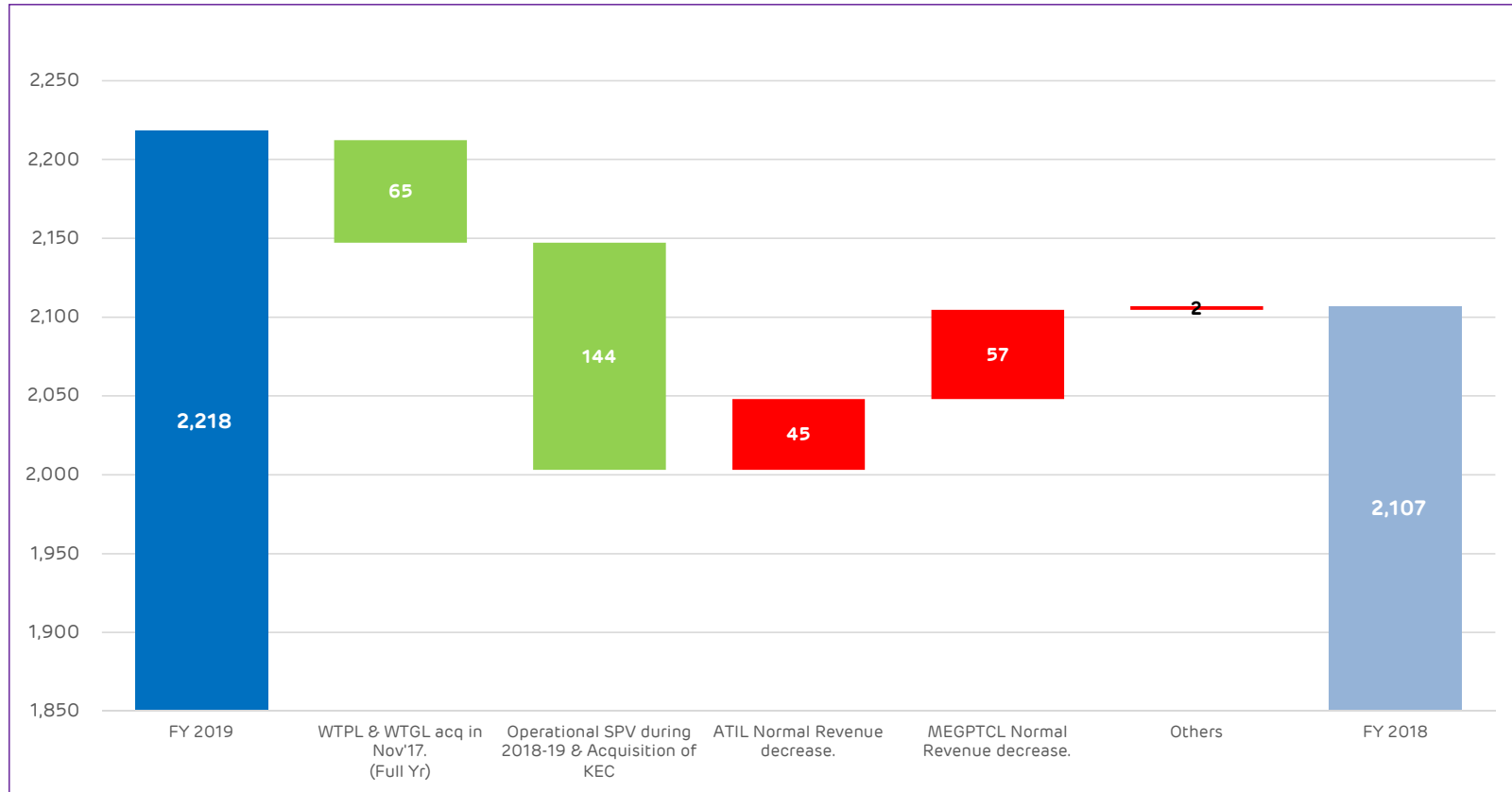
P&L : FY19 v FY18 (Transmission Business) (contd.)

(Rs. In Cr.)

(Rs in Crore)				
Sr No.	Particulars	FY 2019 (Actual)	FY 2018 (Actual)	% change
6=(3+4-5)	EBITDA	2,186	2,064	
7	Finance Cost	854	886	-4%
8	Depreciation	598	579	
9=(6-7-8)	PBT(before one time income)	733	599	22%
10	Arrears Income/Revenue Reversal :	-90	872	
10.1	ATIL Arrear	-	872	
10.2	Revenue Reversal as per True Up Order	-90	-	
11=(9-10)	PBT	643	1,472	
12.1	Tax	143	329	
12.2	Deferred Tax	13	-	
13=(11-12)	PAT	488	1,143	
14	Arrear /reversal Net off Tax	-70	686	
15=(13-14)	Comparable PAT	558	457	22%

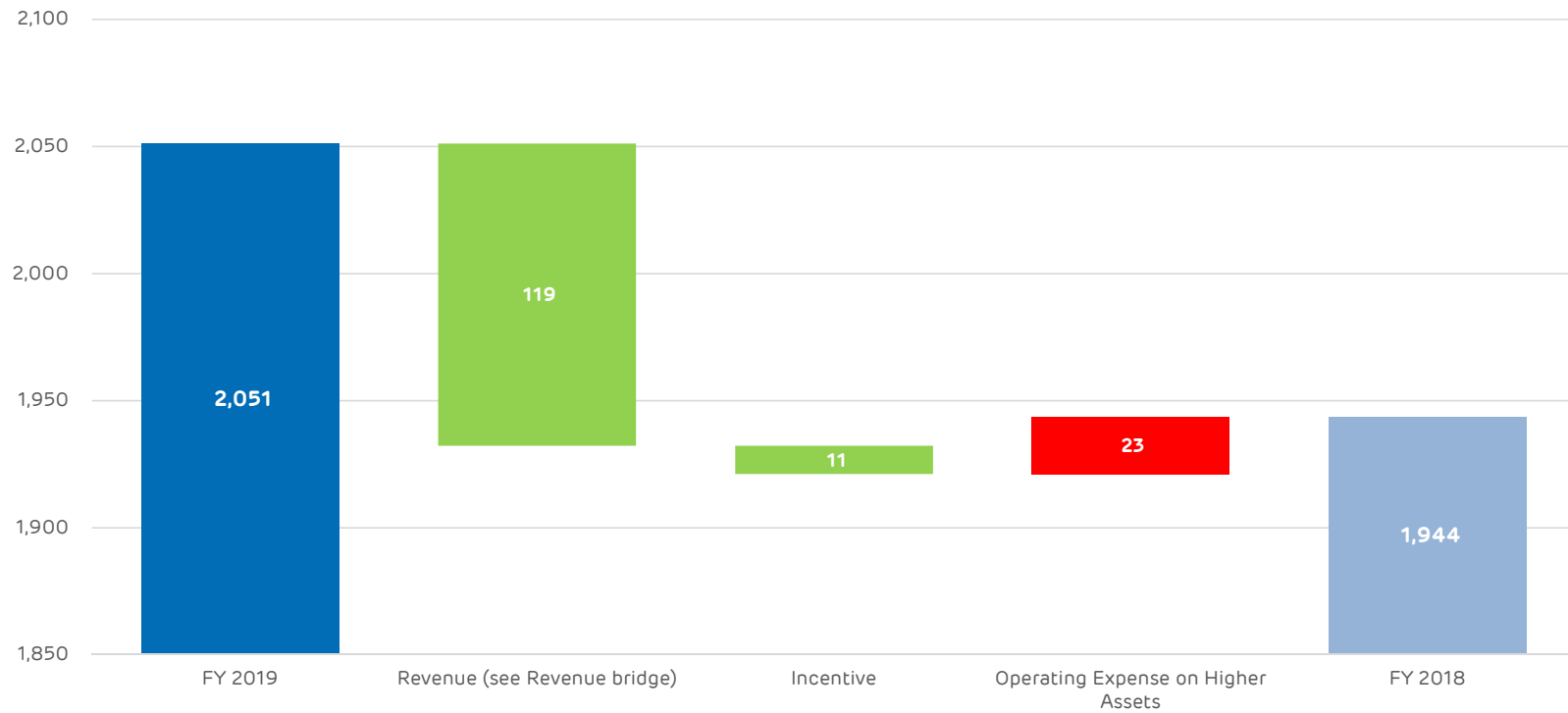
Transmission Business: Revenue Bridge

(Rs. In Cr.)



Transmission Business : Operating EBITDA Bridge

(Rs. In Cr.)



P&L : FY19 v FY18 (Distribution Business)

(Rs. In Cr.)

Particulars	Sept to Mar'19	Sept to Mar'18	Variance
MU's Sold	4,631	4,610	21
Avg Realisation Rate excl FAC/ RA	8	8	1
Revenue :			
Income from Sale of Energy	3,998	3,681	317
Less - Discount for Prompt payment of Bills	18	14	3
Sub Total	3,981	3,667	314
Wheeling charges from Changeover consumers	151	152	-1
Carrying cost on RA	-	282	-282
CSS from changeover consumers	59	79	-20
Other Operating Income	90	174	-84
Total Power Generation and Transmission Income	4,280	4,352	(72)
Total Income	4,280	4,352	-72
Expenses :			
External power purchase	1,649	1,690	-41
Cost of Fuel	642	600	42
Transmission Charges	209	235	-25
Operation and Maintenance Expenses	451	404	47
Employee Benefits Expense	523	437	86
EBITDA	805	987	(182)
Operational EBITDA Margin	19%	23%	

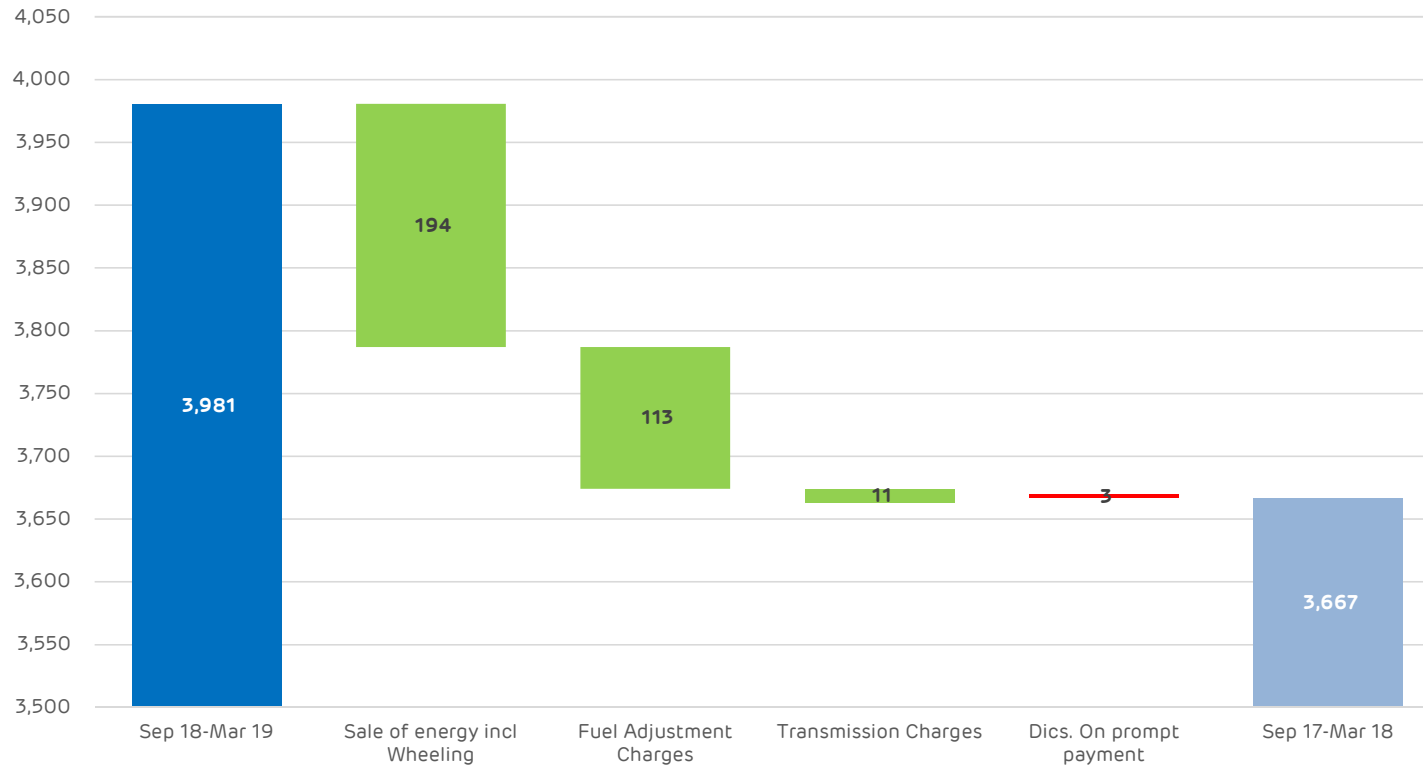
P&L : FY19 v FY18 (Distribution Business) (cont..)

(Rs. In Cr.)

Particulars	Sept to Mar'19	Sept to Mar'18	Variance
EBITDA	805	987	(182)
Operational EBITDA Margin	19%	23%	
Other Income	117	93	24
Finance Costs- GTD	537	153	384
Depreciation Expense	284	330	-46
PBT	101	596	(495)
Regulatory Income/(Expense)	96	260	-164
Tax/Deffered Tax	125	-	125
PAT	71	856	(785)

Distribution Business : Revenue Bridge

(Rs. In Cr.)



Distribution Business : EBITDA Bridge

(Rs. In Cr.)

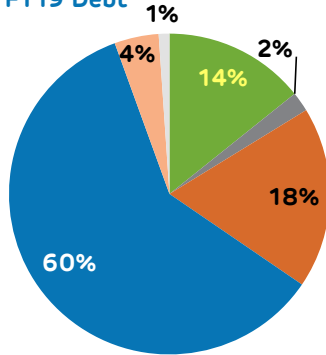


ATL: Financing Prowess

Diversification of funding sources and focus on debt maturity / cost rationalization to deliver improved long-term returns

Diversified Debt Mix^[1]

Based on FY19 Debt

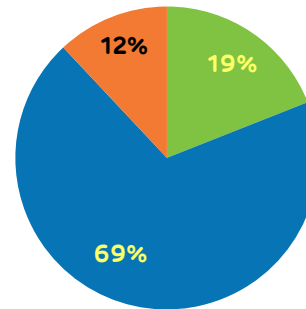


- INR Bond
- INR Masala Bond
- US\$ Bond
- Loans
- CP

Total Outstanding Debt (FY19)
 INR 189 Bn / US\$ 2740 Mn
 (Cash INR 9 Bn & Net Debt 179 Bn)

Improved Returns through Extended Debt Maturity Profile

FY2016



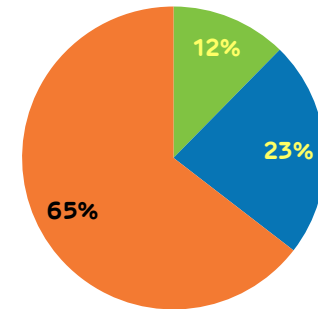
■ < 1 Y ■ 1 to 5 Y ■ > 5 Y

Net Debt / EBITDA

4.2x

Strong Balance Sheet

FY19



■ < 1 Y ■ 1 to 5 Y ■ > 5 Y

Net Debt / EBITDA

4.5x

Investment Grade Ratings: S&P: BBB- / Fitch: BBB- / Moody's: Baa3 / India Ratings: AA+/CARE AA+

Summary

Performance

- Continued operational excellence across Transmission assets, with 99.8% availability
- Focused on maximising incentives
- Distribution loss reduced by 1.6 p.p post acquisition

Growth

- Large addressable opportunity for the private sector in T&D. Pursuing growth in a disciplined manner, with a focus on shareholder returns
- Operationalised 6 new Transmission lines before contracted time and below budget
- Won 2 new Transmission line bids, and significant TBCB pipeline of Rs. 21,000 crore expected in FY 2020
- Tapping into growth opportunities at AEML as per plan

De-risked Business Delivering Shareholder Value

- Low operational risks, and impeccable track record of executing projects before time and below budget
- Combination of regulated return, and long-term fixed tariff contracts. No offtake risk, and availability-based payments
- Optimising ROE through efficient financing. Investment grade international credit rating, and AA+ domestic rating

Appendix

Appendix: Adani Transmission Limited Holding Structure

Adani Transmission Limited Holding Structure

Shareholding as on 31st March 2018
 Promoters: 74.92%
 Public: 25.08%

Adani Transmission Limited



Operating Assets

Under Construction

Operating

A	3,834 ckms	1,217 ckms	397 ckms	3,063 ckms	278 ckms	343 ckms	611 ckms	413 ckms	348 ckms	268 ckms	434 ckms	208 ckms	888 ckms	622 ckms	540 ckms
B	6,630 MVA	6,000 MVA	1,360 MVA	-	-	-	-	585 MVA	-	1,000 MVA	630 MVA	-	-	950 MVA	3,125 MVA
C	c. 28 years	c. 31 years	c. 30 years	c. 31 years	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	c. 18 years
D	Fixed return	Fixed return	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed tariff	Fixed return
E	Centre / State	State	State	Centre	State	State	Centre	State	Centre	Centre	Centre	Centre	State	State	State
F	INR 50 Bn / US\$ 730 Mn	INR 58 Bn / US\$ 849 Mn	INR 4 Bn / US\$ 58 Mn	INR 19 Bn / US\$ 268 Mn	INR 1 Bn / US\$ 20 Mn	INR 2 Bn / US\$ 33 Mn	INR 12 Bn / US\$ 178 Mn	INR 4 Bn / US\$ 65 Mn	INR 5 Bn / US\$ 80 Mn	INR 5 Bn / US\$ 69 Mn	INR 9 Bn / US\$ 140 Mn	INR 4 Bn / US\$ 54 Mn	INR 18 Bn / US\$ 269 Mn	INR 7 Bn / US\$ 108 Mn	INR 56 Bn / US\$ 1,780 Mn

A Transmission line length

B Transformation capacity

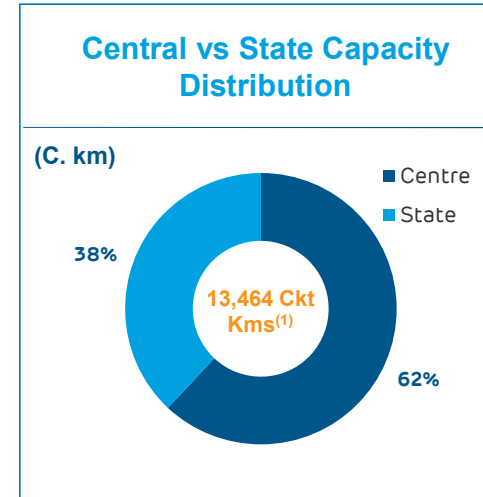
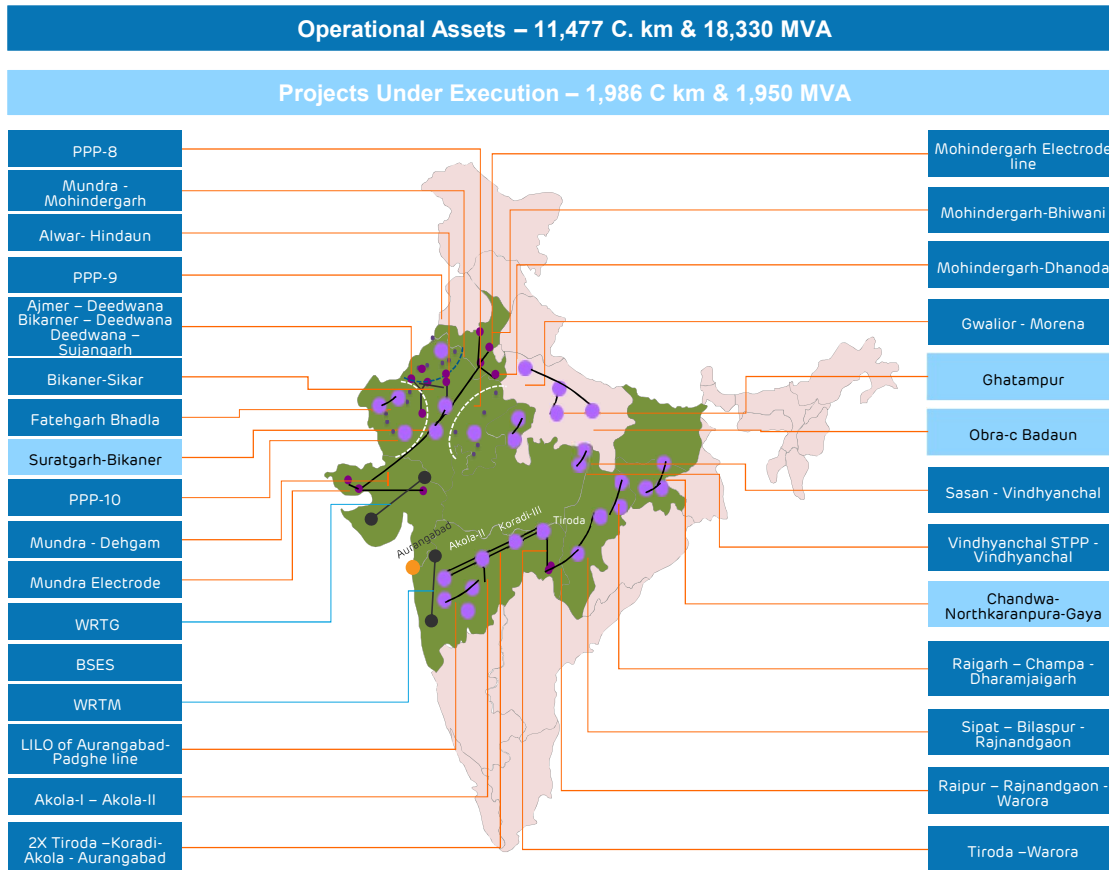
C Residual concession life

D Contract type

E Counterparty

F Asset base⁽²⁾

Largest Pure-play Integrated Transmission and Distribution Player in India



ATL's presence in transmission:

- Provides stable cash flows due to unique pool mechanism.
- Low receivables
- High availability of assets

Thus, earning of applicable incentives pushing returns beyond regulated norms.

Appendix: Financial

P&L : Q4 FY19 v Q4 FY18 (Consolidated)

(Rs. In Cr.)

Sr No.	Particulars	Q4 FY19 Transmissio	Q4 FY19 Distribution	Q4 FY19 # (Consolidated)	Q4 FY18 (Actual)	% change
1	Revenue					
1.1	Net Transmission Charges	575	1,696	2,271	533	
1.1.a	Transmission Charges	576	1,696	2,272	544	318%
1.1.b	Less: Rebate	1	-	1	10	
1.2	Incentive on availability	11	-	11	10	
2	Expenses:					
2.1	Operating Exp					
2.1.a	Operational & Maintanance Exp (inc. new SPVs	43	306	348	47	
2.1.b	Power & Fuel Exp.	-	815	815	-	
2.1.c	New SPV's Operating Exp	6	-	6	-	
2.1.d	Employee Exp	20	222	242	10	
3=(1-2)	EBITDA (From Operation)	517	352	870	487	79%
	Operational EBITDA Margin	88%	21%	38%	89%	
4	Add:					
4.1	Sale of Traded Goods/EPC	260	4	264	222	
4.2	Construction income	0	-	0	40	
4.3	Carrying Cost	-	-	-	4	
4.4	Other Income	8	21	30	68	
5	Less:					
5.1	Purchase of Traded material	260	4	264	222	
5.2	CSR Exp	4	-	4	2	
5.3	Construction cost	-	-	-	37	
6=(3+4-5)	EBITDA	522	373	895	559	60%

P&L : Q4 FY19 v Q4 FY18 (Consolidated) (contd.)

(Rs. In Cr.)

Sr No.	Particulars	Q4 FY19 Transmissio	Q4 FY19 Distribution	Q4 FY19 # (Consolidated)	Q4 FY18 (Actual)	% change
6=(3+4-5)	EBITDA	522	373	895	559	60%
7	Finance Cost	219	217	436	226	
8	Depreciation	150	126	276	143	
9=(6-7-8)	PBT(before one time income)	153	30	183	190	
10	Arrears Income/Revenue Reversal:	-	32	32	-	
10.1	Regulatory Income/(Expense)	-	32	32	-	
11=(9-10)	PBT	153	62	215	190	13%
12.1	Tax	34	15	49	39	
12.2	Deferred Tax	-5	24	19	-	
13=(11-12)	PAT	123	23	147	150	

Key Ratios Mar-19

Particulars	Actual Ratio	Target
Debt Service Coverage Ratio	1.30	< 1.1
Fixed Asset Coverage Ratio	1.32	< 1.1
Net Debt to EBITDA	4.71	> 5.5
Total External Debt to Net Worth	2.30	> 4.0

Credit Ratings

International		
Particulars	Rating Agency	Rating/ Outlook
ATL	Fitch	BBB- (Stable)
	Moody's	Baa3 (Negative)
	S&P	BBB- (Stable)

(IG- Equals to Sovereign Rating)

Domestic		
Particulars	Rating Agency	Rating/ Outlook
ATL	India Rating/CARE	AA+(Stable)
	ICRA	A1+(only CP rating)
	Brickworks	AA+

(IG- Underlying asset could be AAA, but for beneficiary issues/ Operational history)

Credit Ratings - Subsidiaries

Company Name	CARE	CRISIL	India Rating	Brickworks
Adani Electricity Mumbai Limited.	AA		-	-
Aravali Transmission Service Company Limited.	A		-	-
Maru Transmission Service Company Limited.	A-		-	-
Western Transco Power Limited.	-		AA+(SO)	-
Western Transmission (Gujarat) Limited.	-		AA+(SO)	-
Sipat Transmission Limited.	A-	AA+	-	-
Raipur Rajnandgaon Warora Transmission Limited	-		-	A-
Chhattisgarh WR Transmission Limited.	A-		-	-
Adani Transmission (Rajasthan) Limited.	-		-	A-
Barmer Power Transmission Service Limited.	BBB+		-	-
Hadoti Power Transmission Service Limited.	BBB+		-	-
Thar Power Transmission Service Limited.	BBB+		-	-
Fatehpur Bhadla Transmission Limited.	A-		-	-
KEC Bikaner Shikar Transmission Limited.	-		A-(RWE)	-

Consolidated Debt Profile

(Rs. In Cr.)

Particulars	Amount
Obligor	7,224
GMR/WRSSS	1,028
Recently Operational Projects	2,152
Under Construction Projects	50
AEML	8,246
Sub total (a)	18,700
Less: Cash (b)	914
Total (a-b)	17,786

Appendix: AEML Business Overview

Snapshot of AEML Distribution Business



Billing Customer (Lakh)	24.66
Total connections (Lakh)	30.30 ¹
Network Length – HT Cable (Kms)	4,798
Network Length – LT Cable (Kms)	6,139
PT Capacity (MVA)	3,775
DT Capacity (MVA)	4,979
Reliability : ASAI (%)	99.99%
Distribution Loss (%)	7.77%
Collection Efficiency (%)	100.53%
Manpower (Nos)	5,222

Above data is for the year ended 31st March 2019

1. This also includes connections where energy is wheeled on AEML's distribution network to non-AEML customers

Snapshot of AEML Generation Business



Commissioning Year	1,995
Capacity	500
No. of units & Size (MW)	2 X 250

Plant Performance for last 15 years (FY04 – FY18)

Average Availability (%)	95.65
Gross SHR (kCal/kWh)	2,290
Sp. Oil Consumption(ml/kwh)	0.12
Aux Power without FGD(%)	7.67
Aux Power with FGD(%)	8.93
Sp. DM Make up (%)	0.30

Overview of AEML Transmission Business



Transformation capacity (MVA)	3,125
Transmission lines (Ckt kms)	541
220 kV Bays (No)	115
33 kV Bays (No)	385
System Availability (%)	99.84 ¹
System Losses (%)	1.63% ¹
Caters ~70% demand of AEML Distribution	

adani
Transmission

Thank You

