

# **SJS Enterprises Limited**

## **Q3 & 9MFY26 EARNINGS PRESENTATION**



Creating  
Possibilities

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**K A JOSEPH**  
Managing Director

- Founded the company in 1987
- More than 35 years of experience in aesthetics printing business
- Post Graduate Diploma in Business Administration from the St. Joseph's College of Business Administration, Bangalore; B.Sc from Bangalore University



**SANJAY THAPAR**  
Group CEO & Executive Director

- Over 35 years of experience in the automotive industry
- Previously worked with Ashok Minda Group, Minda Valeo Security Systems, Minda HUF Limited, Tata Engineering and Locomotive Company Limited (now known as Tata Motors Limited)
- Bachelor's degree in science (mechanical engineering) from the Delhi College of Engineering



**MAHENDRA NAREDI**  
Group Chief Financial Officer

- 25+ years of experience in financial management, key accounting & financial analysis, FP&A, fundraising, M&As, legal & compliances, and strategy.
- Previously worked in Minda Corporation, Wipro & GE
- Bachelor's degree in Law & Commerce from Rajasthan University, Chartered Accountant and Company Secretary from ICAI and ICSI



**DEVANSHI DHRUVA**  
Head-Investor Relations

- 13+ years of experience in Investor Relations and sell side analyst.
- Previously worked with Westlife Foodworld Ltd. (McDonald's India), Piramal Enterprises Ltd. and Dolat Capital.
- PGDM – Finance from K J Somaiya Institute; M.Com & B.Com (Accounting & Finance) from University of Mumbai

## Strategic Market Position

- Operates in the high value-add aesthetics market across multiple consumer-oriented end industries
- Multi-industry applications enhancing consumer products
- Focused on premium aesthetic products and innovative designs

## Core Products and Technologies

- **Wide product range:** Decals, appliques/dials, overlays, logos/3D lux, aluminium badges, in-mold decoratives (IMD), optical plastics and lens mask covers for diverse applications
- **Innovation-driven:** In-house design and R&D capabilities

## Operational Excellence

- Partner, co-creator and supplier of choice to several leading OEMs in the automotive and consumer durables industry
- Supplying globally from its facilities in Bengaluru, 2 in Pune & 1 at Manesar, Gurugram spread across 4,00,000+ sq. ft.



**Rs 7,605 Mn**  
FY25 Revenue



**26.4%**  
FY25 EBITDA margin



**AA- (Stable)**  
Credit Rating  
by ICRA



**~2,300**  
Workforce



**22**  
Countries served



**4** Production facilities  
(Bangalore, Pune [2], Manesar)  
(+1 facility at Hosur under construction)



**220+**  
Customer locations



**>197 Mn**  
Parts supplied (FY25)



**12,200+**  
SKUs (FY25)



# Q3 & 9MFY26 Business & Financial Highlights

SJS delivered a stellar **46.0% YoY growth in automotive business** v/s 15.7% YoY growth for automotive (2W + PV) industry



- **Highest ever Quarterly Revenue at Rs. 2,435.3 Mn**, a growth of **36.4% YoY**
- Growth largely driven by **48.7% YoY growth in 2W segment** and **43.5% YoY growth in PV segment**
- **Quarterly Domestic business** grew by **28.8% YoY**
- **Highest ever quarterly exports revenue at Rs 283.1 Mn**; growth of **146.2% YoY**



- **Q3 EBITDA** grew **56.9% YoY** to **Rs 756.4 mn**; EBITDA margins at **30.5%**
- **Q3 PAT** grew **62.5% YoY** to **Rs 450.4 Mn** with a margin of **18.5%**
- **Highest quarterly profitability margins since IPO**



- **FCFF** as on 31<sup>st</sup> Dec 2025, is **Rs. 975.9 Mn**
- Strong cash flow generation; **Net cash at Rs. 2,030.1 Mn**



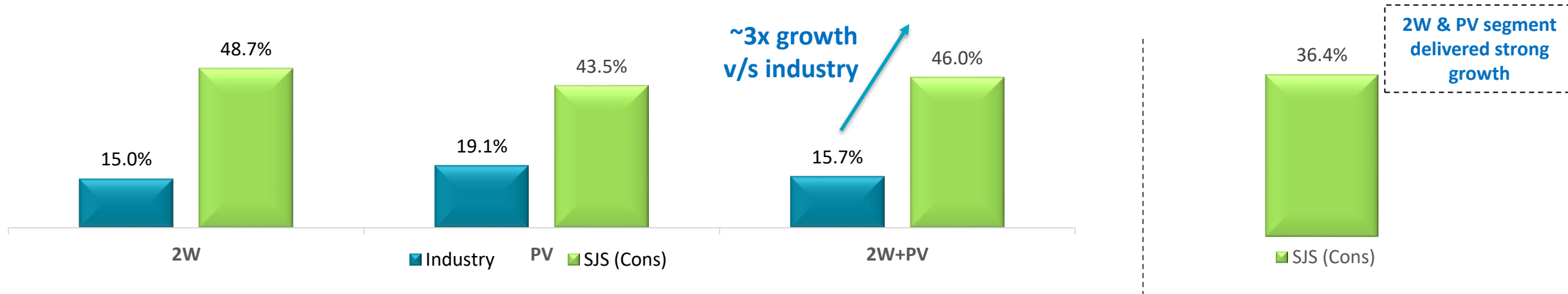
- **Technology License Cum Supply Agreement** signed with **BOE Varitronix (BOEVX)**, Hong Kong, for optical bonding and assembly of automotive display systems in India
- Strengthening our presence in Germany through sales representative

**Achieved PAT of Rs 1,229.2 Mn in 9MFY26, surpassing FY25 full year PAT of Rs 1,188.4 Mn**

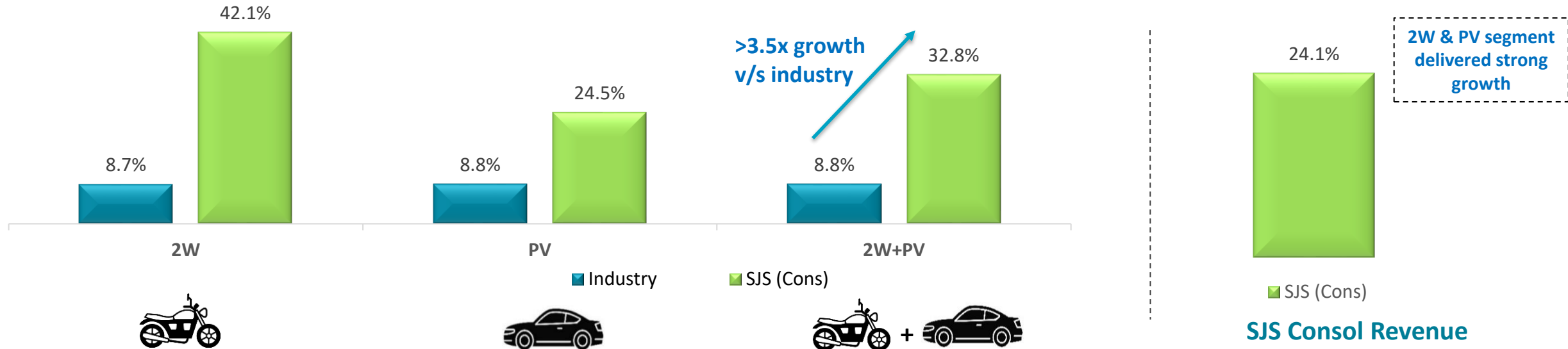
# SJS | Outperforming the Industry Growth for 25<sup>th</sup> consecutive quarter



## Q3FY26 - Industry Production Volume<sup>1</sup> v/s SJS YoY Sales<sup>2</sup>



## 9MFY26 - Industry Production Volume<sup>1</sup> v/s SJS YoY Sales<sup>2</sup>



Note: 1) Industry Production Volumes are production in India; 2) For SJS YoY Sales it is Consolidated numbers

***Strong growth story continues...***

**Growing Mega Accounts**  
- Key Business Projects Won



**New Customer Addition**



Raptee, EV 2W



Urban Company – Water Purifier



**Entered Technology License cum Supply Agreement (TLA) with BOE Varitronix (BOEVX), Hong Kong, for the optical bonding and assembly of automotive display systems in India**



&



### Key Highlights:

- SJS will optically bond and assemble automotive displays for 4W and supply to customers in India
- BOEVX will **supply essential components** & support localization of optical bonding, cover glass & backlight units
- BOEVX will transfer **licensed technology, know-how, and technical expertise**
- Provide training and support for manufacturing and quality control of automotive displays

### Strategic Impact

- Enhances product capabilities and accelerates localization of key display components
- Opens up a new growth vertical for SJS in digital automotive displays
- Strengthening leadership in the automotive industry through innovation & strategic partnerships, driving sustainable growth for stakeholders

1



SJS Chairman, Mr. Ramesh Jain, has been recognized as one of the **Top 10 Chairmen in India – 2025** by CEO Insights magazine.

2



Awarded '**Working Capital - Plan of The Year**' award at the UBS Forums, 17<sup>th</sup> Edition, Future of Finance Summit & Awards 2025



## Environmental

- In process of securing **2 MW wind power** from **DB Renew Pvt. Ltd.**
- Supply started from **Surya Urja 1** for **~3 MW solar power** at SJS
- **4.65 MW power supply started** for SJS Decoplast & WPI from Amplus.
- Planning to implement electric buses for employee commuting to enhance our sustainability efforts



**95.7% SJS Standalone**

**79.1% SJS Group**

Renewable Energy Consumption  
(Q3FY26)



**14.1%**

Women Workforce \*



## Social

SJS contributed towards various social cause:

- **Let's Feed the Needy** to provide home cooked food to the needy at Orphanages and old age homes
- **Different Art Center** to educate and empower specially-abled children
- **CBCI Society** for medical education & for providing medical aid to the underprivileged



**8.9 hrs**

Average training hrs  
per employee



Professional  
Management



## Governance

- Established robust risk management framework for mitigating risks
- Board committees ensure effective management and governance
- Achieved ISO 50001 certification for energy management
- SJS is in the process of implementing ISO 27001 for ISMS (Information Security Management System) Certification



**7.1%**

Female Managers \*

\* As per FY25 (consolidated)

**SJS received ESG rating of 70.4 (Good) from SES ESG Research and 74 (B+ and Very Good) from CFC Finlease**

## Launch of Pink Line - we reaffirm our commitment towards women's empowerment, inclusion and safety at the workplace



### Pink Line Initiative

#### Equal Rights, Equal Power

#### What is Pink Line

- Dedicated production area for women
- Trained women operators for inspection
- Encourage mutual respect and teamwork among women's

#### Purpose

- Promote women empowerment on shopfloor Initiative to intended to promote gender diversity
- Encourage skill development and leadership in Women
- Provide equal opportunity
- Inclusive and progressive workplace culture

# SJS | Q3 & 9MFY26 Financial Performance

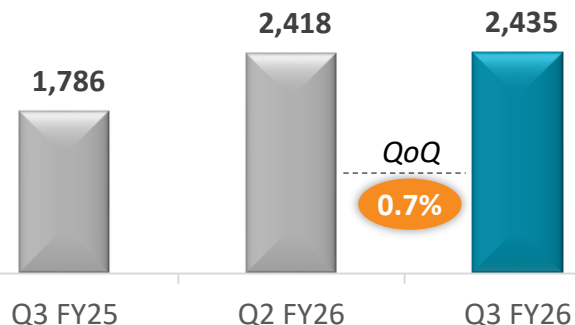


All figures in Rs. Mn

## Revenue from Operations

↑ YoY

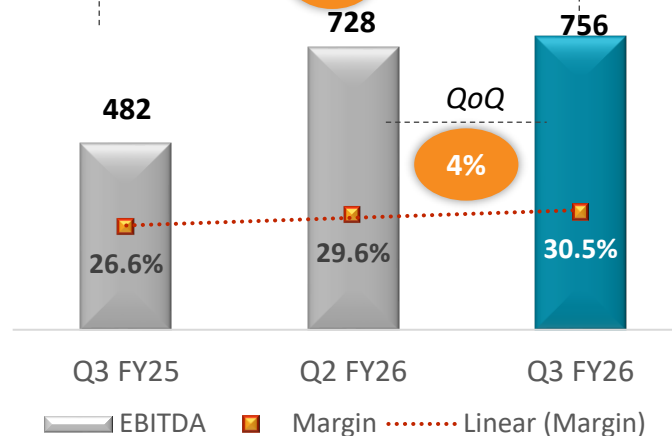
36%



## EBITDA and EBITDA Margin (%)

↑ YoY

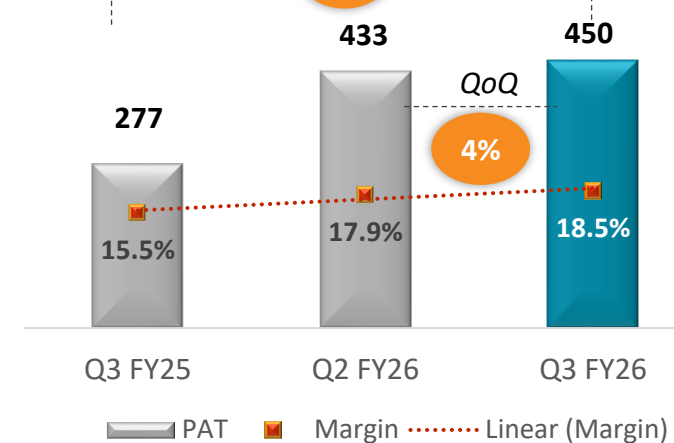
57%



## PAT and PAT Margin (%)

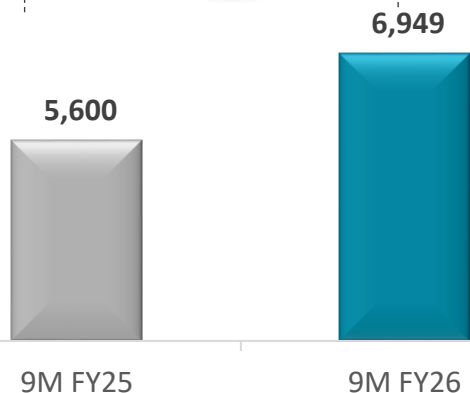
↑ YoY

63%



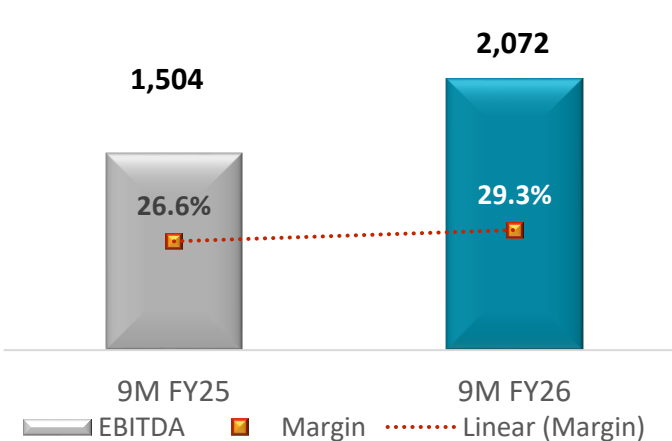
↑ YoY

24%



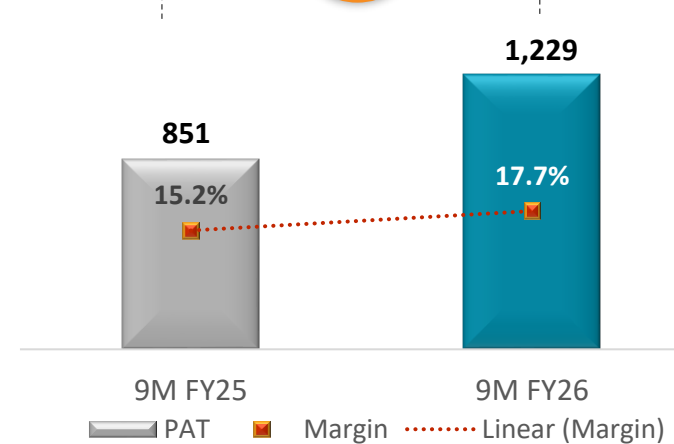
↑ YoY

38%



↑ YoY

44%

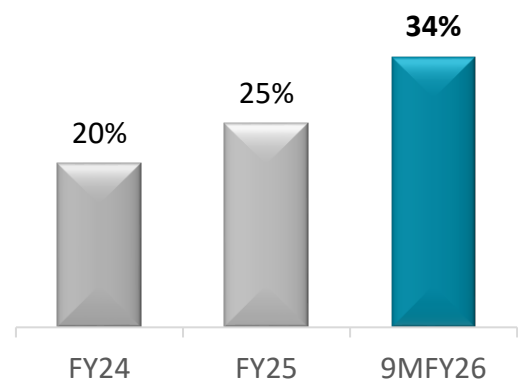




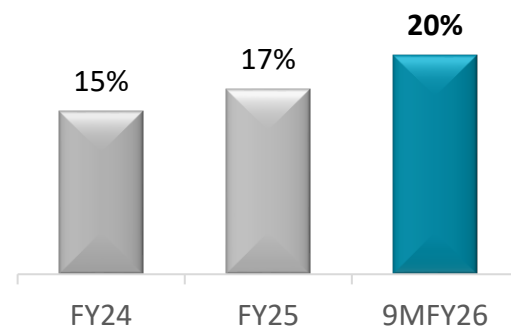
(Rs. Mn.)	FY24	FY25	9MFY26
Long Term Debt	400	0	0
Short Term Debt	283	158	69
<b>Total Debt</b>	<b>683</b>	<b>158</b>	<b>69</b>
Less: Cash & Cash Equivalents	551	1,150	2,099
<b>Net Debt / (Cash)</b>	<b>133</b>	<b>(992)</b>	<b>(2,030)</b>
Total Equity	5,616	6,892	8,278

- **Strong cash flow** generation to support expansion initiatives
- **Consistently delivering robust ROCE and ROE performance. Our ROE and ROCE improved to 19.8% and 34.0%**
- SJS continues to deliver **strong financial performance**, creating **long term shareholder value**

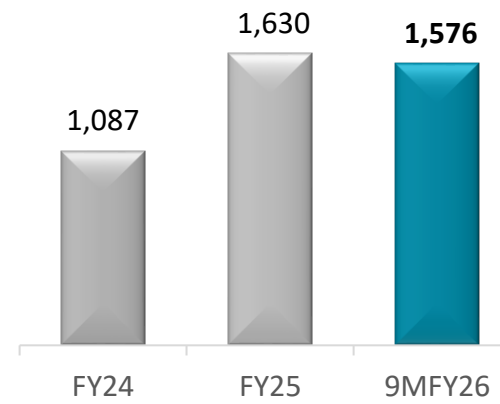
## Return on Capital Employed (%)



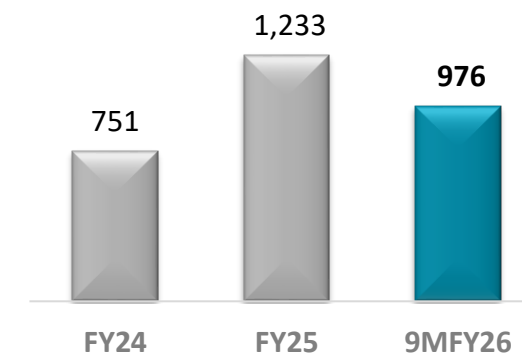
## Return on Equity (%)



## CFO (Rs. Mn)



## FCFF (Rs. Mn)



(INR in Mn)	Q3FY26	Q3FY25	YoY%	Q2FY26	QoQ%	9MFY26	9MFY25	YoY%
Operating Revenue	2,435.3	1,785.6	36.4%	2,417.6	0.7%	6,949.5	5,599.7	24.1%
EBITDA	756.4	482.1	56.9%	728.4	3.8%	2,072.0	1,504.1	37.8%
EBITDA Margin %	30.5%	26.6%		29.6%		29.3%	26.6%	
PAT	450.4	277.1	62.5%	432.7	4.1%	1,229.2	851.0	44.4%
PAT Margin %	18.5%	15.5%		17.9%		17.7%	15.2%	
EPS	14.05	8.83		13.73		38.83	27.14	

- Q3FY26 domestic sales grew by 28.8% YoY to Rs 2,152.2 Mn; on back of 48.8%YoY growth in 2W business & 36.8% YoY growth in PV business
- Q3FY26 Export<sup>1</sup> grew 146.2% YoY to Rs 283.1 Mn, forming 11.6% of consolidated Q3 revenue
- Q3FY26 EBITDA grew 56.9% YoY to Rs 756.4 Mn, healthy margins at 30.5%, margin expansion by 396 bps, on back of better product mix, increasing exports contribution and operational efficiency improvement

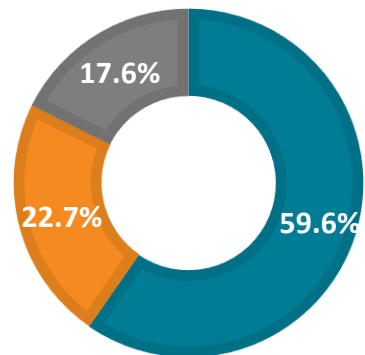
Note: 1) Exports include Deemed exports – Deemed exports means products made for global customers for their plants out of India but is delivered to their Indian Purchasing Office; 2) EBITDA and PAT impacted due to the New Labour Codes announced by Govt of India in Nov'25, there was a one-time impact of Rs 18.1 Mn, that has been taken under Employee Benefit Expenses in Q3FY26.

## Revenue by Business

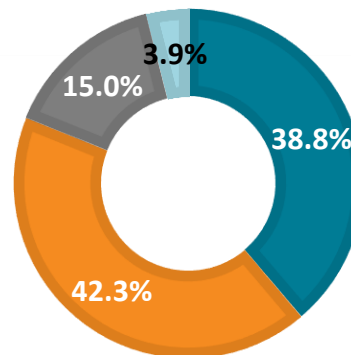
## Revenue by End Segment

## Revenue by Geography

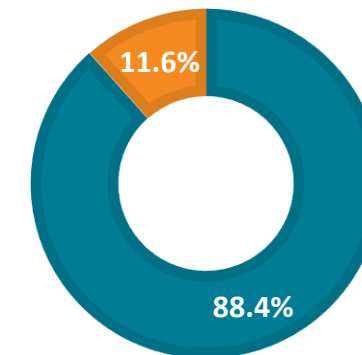
Q3 FY2026



■ SJS ■ SJS Decoplast¹ ■ WPI

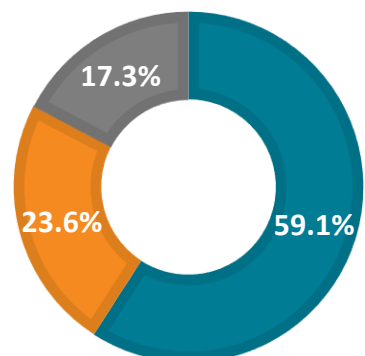


■ 2W ■ PV ■ Consumer ■ Others

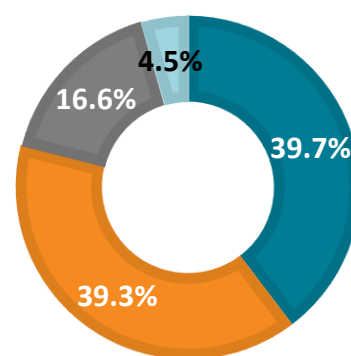


■ Domestic ■ Exports²

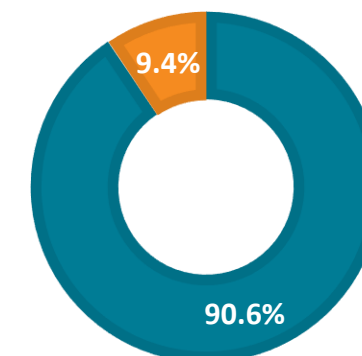
9M FY2026



■ SJS ■ SJS Decoplast¹ ■ WPI



■ 2W ■ PV ■ Consumer ■ Others



■ Domestic ■ Exports²

**New generation products contributed 23%+ of consolidated revenue during 9MFY26**

Note: 1) SJS Decoplast Private Limited erstwhile Exotech Plastics Private Limited; 2) Exports include Deemed exports – Deemed exports means products made for global customers for their plants out of India but is delivered to their Indian Purchasing Office



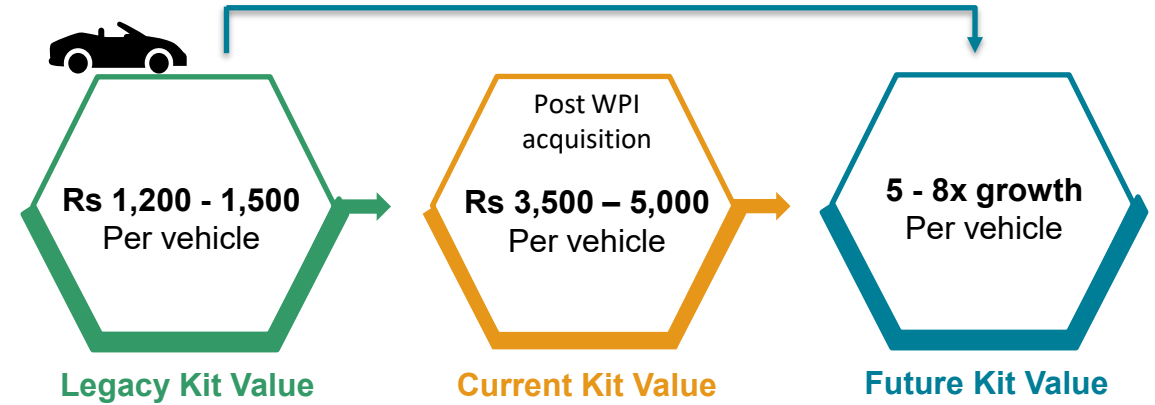
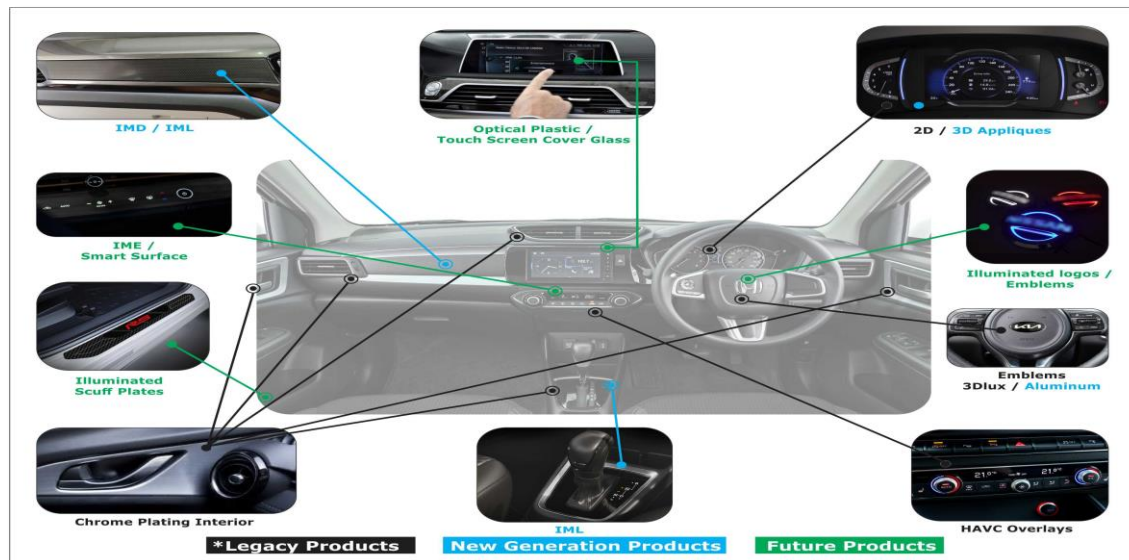
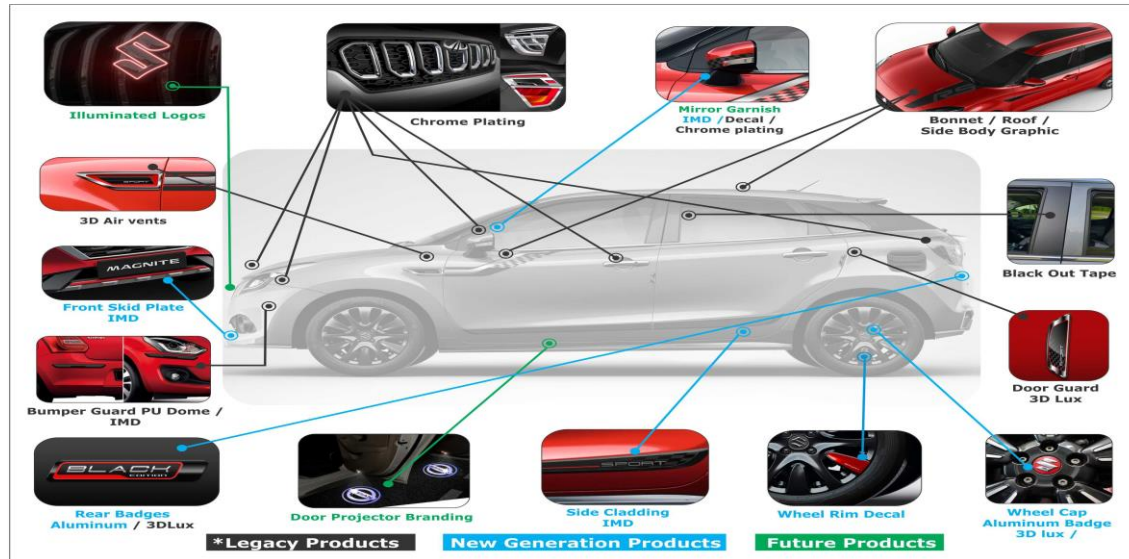


# Future Growth Outlook

# SJS | Development & Delivery of New Product Pipeline Remains at the Core of SJS (1/2)



Driven by premiumization, new age aesthetic products to drive realization increase across categories



## SJS' New Age Products (PV: Select Examples)

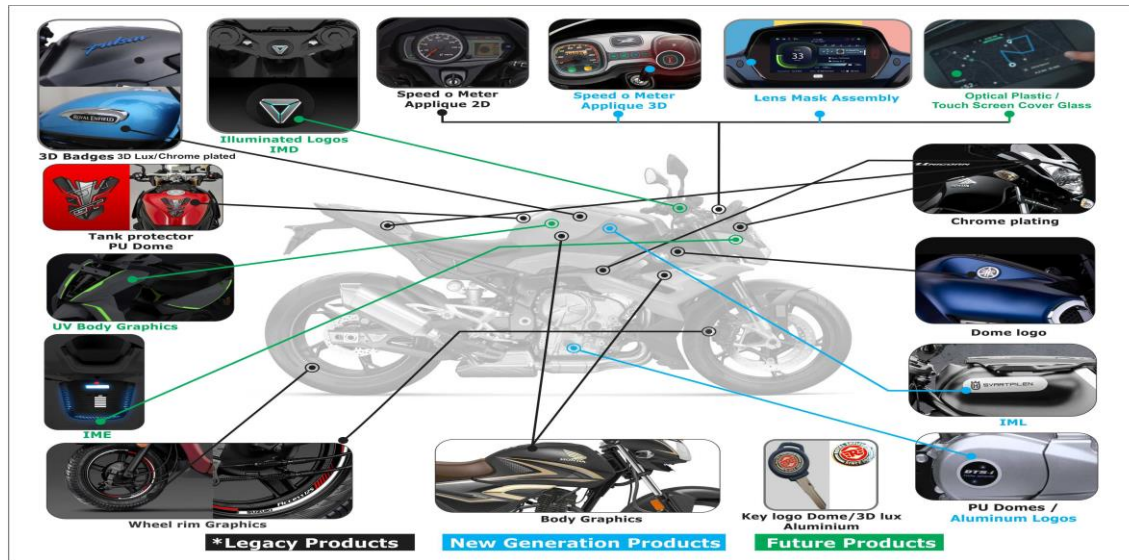


- ✓ SJS Decoplast & WPI acquisitions have added chrome parts & IMD/IML/IMF parts - key ingredients in the design of modern PV's

# SJS | Development & Delivery of New Product Pipeline Remains at the Core of SJS (2/2)



Driven by premiumization, new age aesthetic products to drive to realization increase across categories



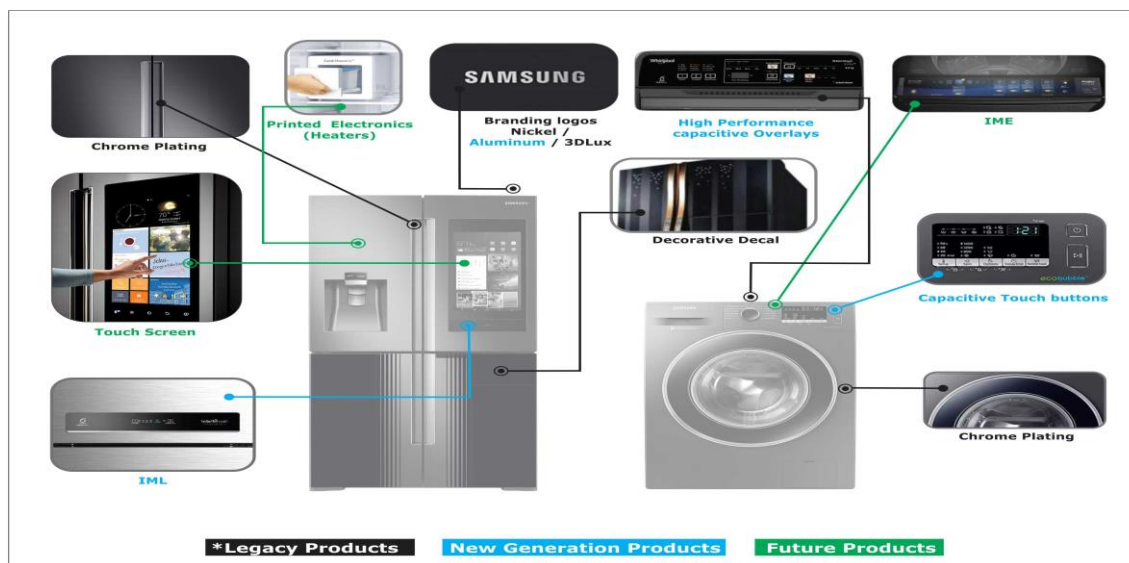
Rs 300 - 500  
Per vehicle

Legacy Kit Value

1.5 - 2x growth  
Per vehicle

Future Kit Value

SJS' New Age Products (2W: Select Examples): Optical plastics/touch screens, aluminium logos, illuminated logos (WPI)



Rs 50 - 150  
Per product

Legacy Kit Value

3 - 4x growth  
Per product

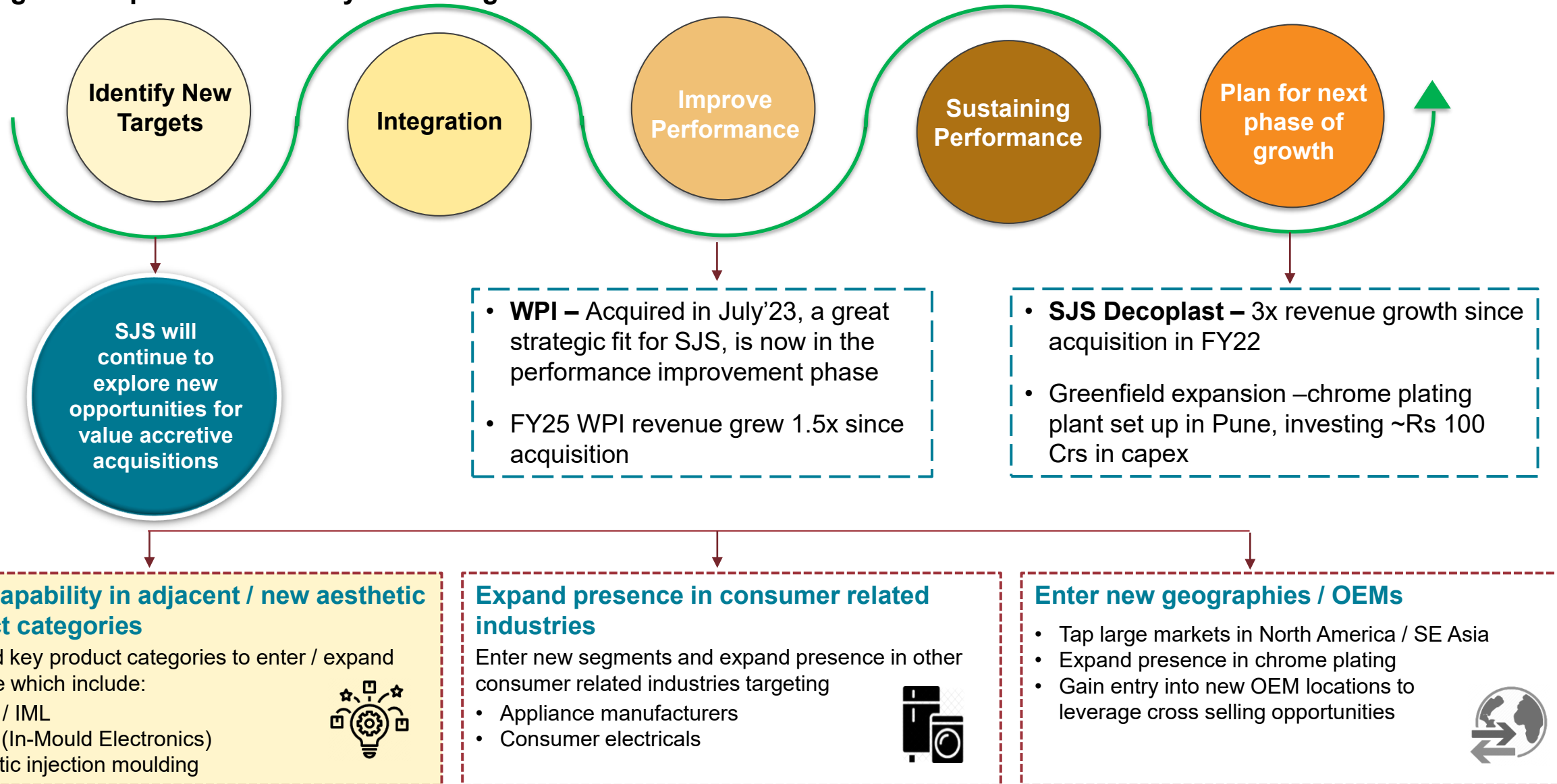
Future Kit Value

SJS' New Age Products (CD: Select Examples): Optical glass / touch screens, IMD/IML overlays, printed electronics (WPI)



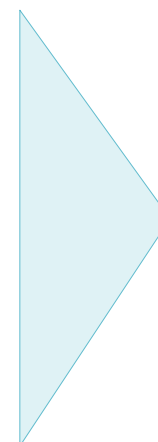


## Merger & Acquisitions is a Key Pillar for growth



- SJS to continue its strong financial performance trajectory
- SJS expects to outperform the underlying industry growth by **over 2.5x** on account of :
  - Premiumisation + Building Mega OEM Accounts + Exports = **Higher than industry sales growth for SJS**
  - Business breakthrough with **new large OEMs and locations** leading to significant business growth
- Continue to maintain robust margin profile of business for FY26

9MFY26 Performance (INR Mn) <sup>1</sup>		YoY Growth %
Revenue	6,949.5	24.1%
EBITDA	2,072.0	37.8%
EBITDA Margin	29.3%	
PAT	1,229.2	44.4%
PAT Margin	17.7%	



- Continue to maintain robust EBITDA margins
- Cash and Cash Equivalents were at Rs 2,098.8 Mn with **Net Cash at Rs 2,030.1 Mn** as on 31<sup>st</sup> Dec'25
- **High cash flow generating company.**  
Cash flow from operations ~76% of EBITDA

## Q3 & 9MFY26 Earnings Call Invite

**SJS Enterprises Limited (BSE: 543387)** announced its results for the quarter and nine months ended Dec 31<sup>st</sup>, 2025, on Jan 28<sup>th</sup>, 2026. Following the announcement, the management team will host a conference call for investors and analysts on Jan 29<sup>th</sup>, 2026, at 10:30 AM IST. The call will commence with a brief discussion on the previous quarter's performance followed by an interactive question and answer session. Call details are below:

<b>Day &amp; Date</b>	<b>Thursday, 29<sup>th</sup> Jan, 2026</b>
<b>Time</b>	<b>10:30 AM IST   01:00 PM HK/SINGAPORE   05:00 AM UK TIME*   12:00 AM USA EDT*</b>
<b>Duration</b>	60 minutes
<b>Universal Dial in</b>	<b>+91 22 6280 1146   +91 22 7115 8047</b>
<b>International Toll Free</b>	HK: 800 964 448   SG: 800 101 2045   UK: 0 808 101 1573   USA: 1 866 746 2133
<b>Diamond Pass Link</b>	<a href="#">Registration</a>

*Note: Please dial in at least 10 minutes prior to the schedule to ensure that you are connected in time. Audio and transcript will be available with in ten working days after the call on Investors page of company website ([www.sjsindia.com](http://www.sjsindia.com)).*

For further information, please contact;; Devanshi Dhruva | [devanshi@sjsindia.com](mailto:devanshi@sjsindia.com)

IR Advisors: Simran Malhotra/ Varsha Bafna | [sjs@churchgatepartners.com](mailto:sjs@churchgatepartners.com)



# Appendix



# SJS | Longstanding history of design backed manufacturing excellence



Evolution into a leading design and aesthetics focused business

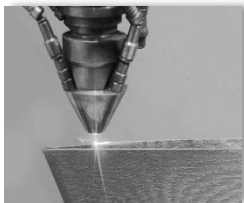


**1987**

SJS founded by three entrepreneurs

**2006**

Joint Venture with Serigraph, a US based commercial printing player



**2010-14**

New product addition in premium segment – 3D Lux etc.

**2015**

Everstone Capital acquired a majority stake; exit by Serigraph



**2015-17**

Entry into new product lines - IMD parts, aluminum & electro formed badges

**2018**

New manufacturing facility commissioned with 225,000 sq.ft. area and significant capacity boost



**2019-20**

Introduced premium / technologically advanced products (formed dials, Optical plastics, lens mask assemblies) and expanded PV customer base with new product range

**2021**

**Exotech Plastics**  
**Apr'21** - Acquisition completed to further complement product suite with addition of chrome products  
**In Nov-21, SJS went public** & became the only listed company in India in this space

**2023**

**Walter Pack India**  
**July'23** - Acquired 90.1% stake in WPI. Focused on IMF, IML, IMD and IME technologies for automotive and appliance sectors  
**Aug'23** – Stake sale of ~30% by PE promoter Everstone Capital

**2025**

Entered Technology License cum Supply Agreement with **BOE Varitronix Ltd, HongKong**, for the optical bonding and assembly of automotive display systems in India



Decals & Body Graphics



2D Appliques & Dials



3D Appliques & Dials



Overlays



## Aluminium Badges



## Domes



## 3D Lux Badges



## Aftermarket – “Transform”





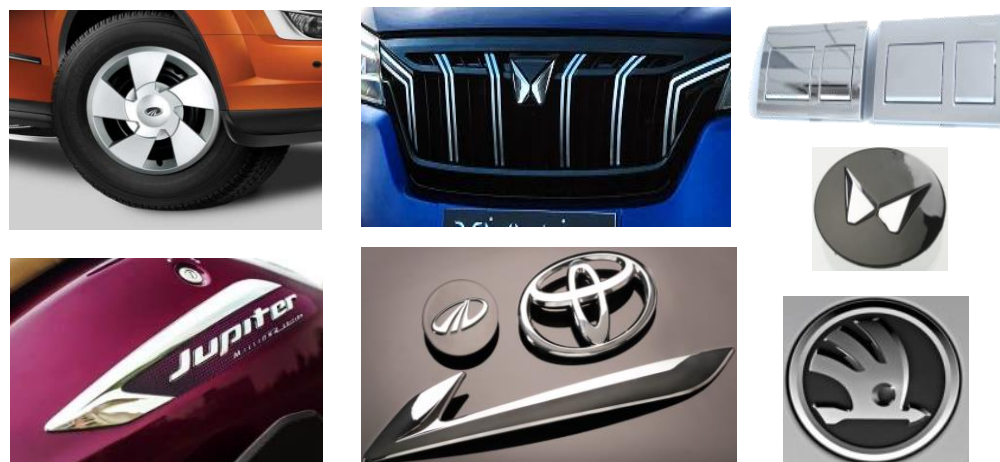
## Lens Mask Assembly



## Optical Plastics



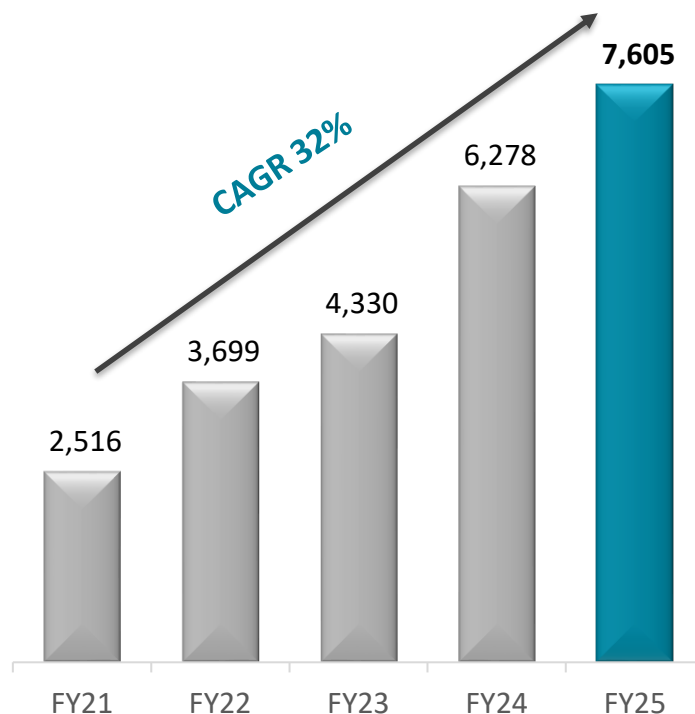
## Chrome plated parts (SJS Decoplast)



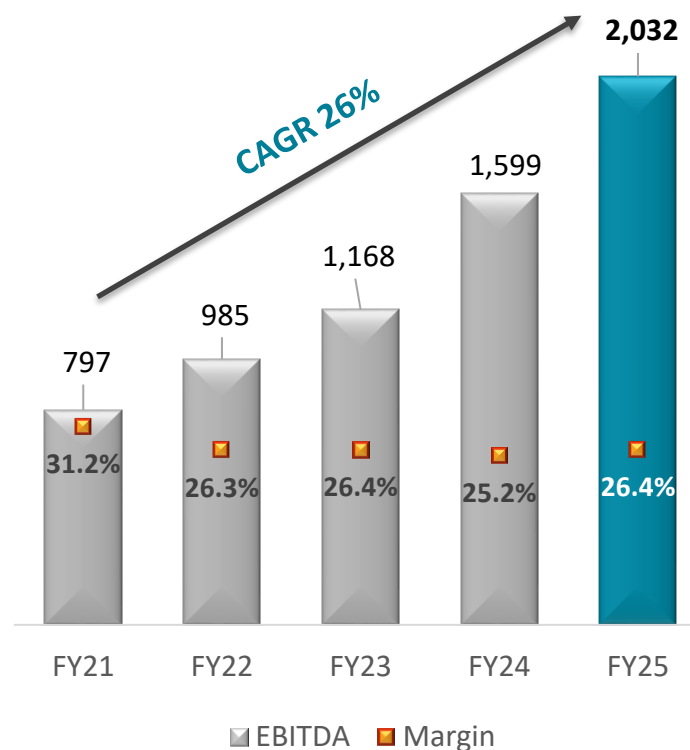
## IMLs / IMDs (SJS & Walter Pack India)



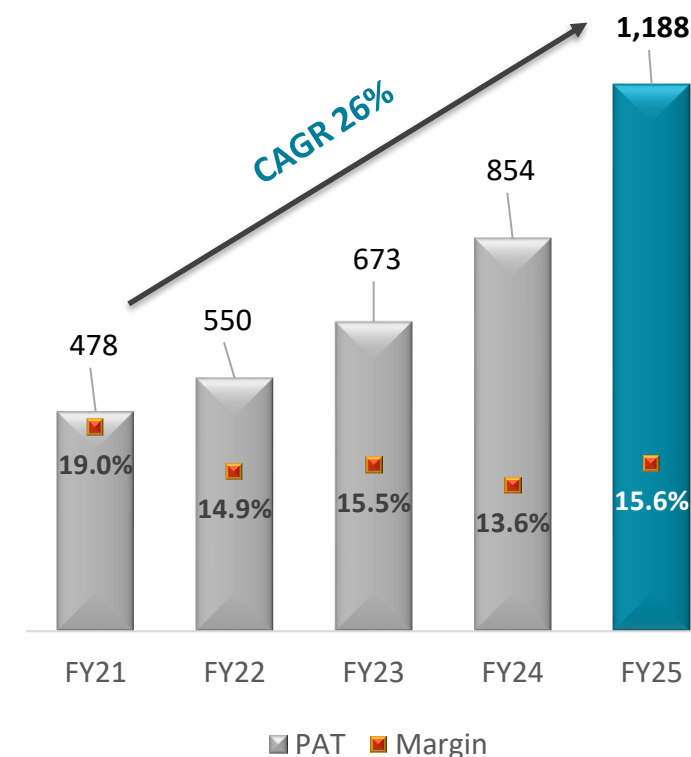
## Revenue from Operation



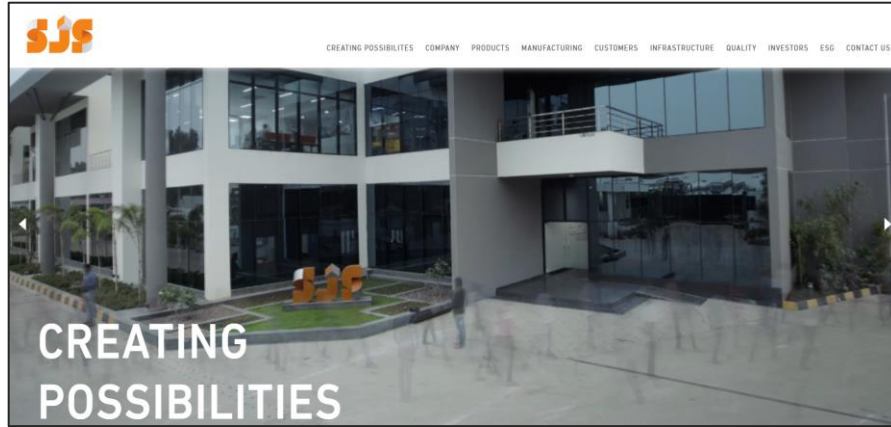
## EBITDA and EBITDA Margin (%)



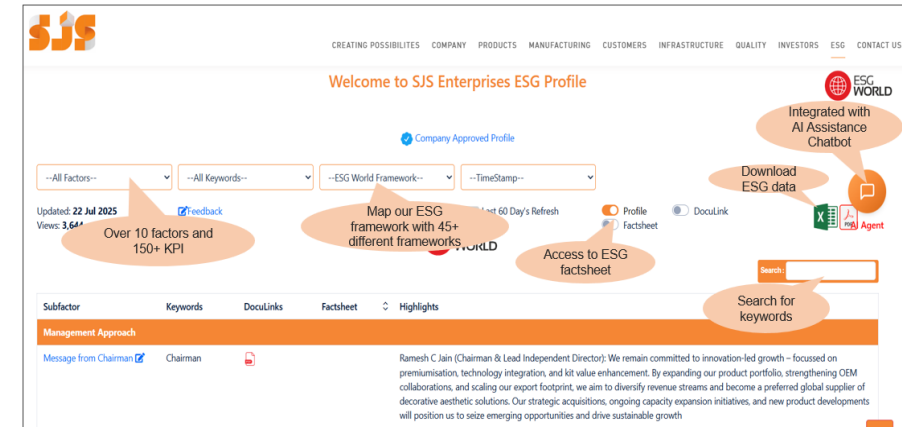
## PAT and PAT Margin (%)



## SJS Website



## ESG Disclosure Platform



**SJS Enterprises ESG Profile Link ([Click Here](#))**

## ESG Factors (17)

Management Approach (4)

Company Overview (15)

Board of Directors (6)

Resilience (6)

Environment (49)

Social (82)

Governance (94)

Vérifications and Assurances (2)

Materiality Assessment (14)

Awards and Recognitions (5)

Ratings and Indices (1)

ISO and Certifications (8)

Partnerships (2)

Profile Sources (41)

Corporate Information (17)

Membership (3)

BRSR (150)

FY2025

Environment (4)	Social (8)		Governance (4)	Others (4)
<b>26,865.52 GJ</b> Renewable Energy Consumed	<b>18.44%</b> Female Gender Composition	<b>5.35</b> Employee Turnover Rate	<b>50%</b> Independent Board of Directors	<b>ISO 9001:2015</b> Quality Management System
<b>8.81 GJ/Rupees</b> Energy Intensity per Rupees turnover	<b>100%</b> Staff Trained Staff on Health and Safety	<b>12.87%</b> Gross Salary Paid to Female Workforce	<b>16.6% Female</b> Board Composition	<b>ISO 14001:2015</b> Environmental Management System
<b>Nil</b> Water Stress Area	<b>2.30%</b> Amount Spend on Employees Well-being	<b>24,318</b> Learning Hours	<b>Nil</b> Penalty Disclosures	<b>ISO 45001:2018</b> Occupational Health and Safety
<b>870</b> Tree Planted	<b>Rs. 21.90 Millions</b> CSR Activities	<b>100%</b> Employee Performance Reviews	<b>Nil</b> Number of Data Breach Incidents	<b>LEED Gold certified</b> Bengaluru Facility

*Our strategic acquisitions, ongoing capacity expansion initiatives, and new product developments will position us to seize emerging opportunities and drive sustainable growth.*

- K. A. Joseph, Promoter & Managing Director

# SJS | Experienced & Qualified Board Team



**K A Joseph**

*Managing Director – Promoter & Co-founder*

- Over 35 years of experience in aesthetics printing business
- Leads the manufacturing operations for SJS and has spear-headed technological and product innovation over the years
- Also, a Director on the board of SJS Decoplast



**Ramesh Chandra Jain**

*Non-Exec Chairman & Independent Director*

- Over 40 years experience in the industry, of which 25 years worked in Eicher & retired as group vice chairman
- Received the Society of British Aerospace Companies Prize in Aircraft Production, 1972-73 from the Cranfield University



**Sanjay Thapar**

*Executive Director and Group CEO*

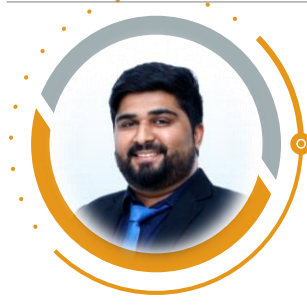
- Over 35 years of experience in the auto industry
- Previously Group Chief Strategy Officer with Ashok Minda Group; MD of Minda Valeo Security Systems



**Matthias Frenzel**

*Non-Executive & Independent Director*

- Holds a Diploma in Mechanical Engineering (material technology) from Technical College, Berlin & a Master's in Business Administration from Düsseldorf Business School GmbH
- Previously worked with Visteon Electronics Germany GmbH, S-Y Systems Technologies Europe GmbH and Johnson Controls GmbH



**Kevin K. Joseph**

*Executive Director*

- Holds a bachelor's degree in mechanical engineering
- Previously worked with Tata Elxsi Limited as a senior design engineer



**Veni Thapar**

*Non-Executive Independent Director*

- Presently a Sr. Partner of V K Thapar & Company, Chartered Accountants. Also, a qualified Cost Accountant from ICAI
- Independent Director on the boards of Mazgaon Dock Shipbuilders Limited and Monedo Financial Services Private Limited



**Roy Mathew**

*Executive Director at WPI*

- Founded WPI in 2006 along with Walter Pack Spain; Extensive experience in various plastic technologies like IMF, IMD, Injection moulding, lighting etc.
- Prior to WPI, Roy worked with firms including Lumax Industries Ltd. & Tek electromechanicals Pvt. Ltd.



**Anil Sondur**

*Non - Executive Independent Director at WPI*

- 40+ years of experience in the industry, possessing immense expertise in business strategy, new business development/ expansion and product design & strategy
- Previously served as Executive VP at Tata Elxsi Ltd for 20+ years, Sr. Manager at Rolta India Ltd, and Sr. Marketing Executive at Nelco





**MAHENDRA NAREDI**  
*Group Chief Finance Officer*

- 25+ years of experience in financial management, key accounting & financial analysis, FP&A, fundraising, M&As, legal & compliances and strategy
- Previously worked in Minda Corp, GE and Wipro
- Bachelor's degree in Law & Commerce from Rajasthan University. Chartered Accountant and Company Secretary from ICAI and ICSI



**RANJIT NAMBIAR**  
*Group Chief Operations Officer*

- 30+ years of diversified experience in chemicals, polymers/ plastics, consumer appliances, Automotive interior systems and EV component solutions.
- Previous leadership roles with Spark Minda, Tata Auto EV Components Solutions and IAC - India.
- Holds Post Graduate Dip. in Plastics Technology from Central Institute of Plastics Engg .& Tech.; a Bachelor's Degree in Science from Calicut University and a Transformational Leadership from IIM Ahmedabad



**SADASHIVA BALIGAR**  
*Chief Operations Officer*

- 35+ years of experience in operations roles across the automotive industry
- Previously worked with Motherson Automotive Technologies, Toyota Kirloskar Auto Parts & Automotive manufacturers SDN BHD (Malaysia)
- Holds a bachelor's degree in mechanical engineering from the University of Mysore



**R. RAJU**  
*Chief Marketing Officer*

- 28+ years of experience in the field of marketing
- Previously worked with ITW India, ITW Signode India, Minda Corp etc.
- Holds a diploma in mechanical engineering from the Thiagarajar Polytechnic, Salem, and a post graduate diploma in marketing management and a masters degree in business administration

# THANK YOU

**Head Investor Relations:**

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