

SKIPPER LIMITED

INVESTOR PRESENTATION Q2 & H1 FY'22 Results



9th November, 2021

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Company is India's largest and world's only Integrated T&D company having its own Structure rolling, manufacturing, Tower Load Testing Station & Transmission Line EPC.



SKIPPER: ONE-STOP SOLUTION PROVIDER

Engineering products

Capacity: 300,000 MTPA

- Power Transmission Tower
- Power Distribution Poles
- Monopoles
- Telecom Tower
- Railway Structures
- MS & High Tensile Angles
- Solar Structures
- Fasteners
- Tower Accessories



Highlights

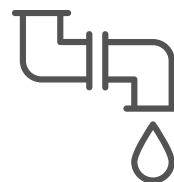
Positioned as one of the world's leading transmission tower manufacturer; largest in India

**Revenues
(FY'21)**
Rs11,986mn

Polymer products

Capacity: 51,000 MTPA

- UPVC Pipes
- CPVC Pipes
- SWR Pipes
- HDPE Pipes
- CP & PTMT
- Fittings



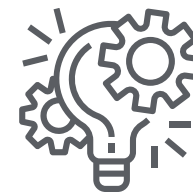
Highlights

- Only polymer pipe company in India to implement TOC in its operations

**Revenues
(FY'21)**
Rs2,165mn

Infrastructure projects

- Transmission Line EPC
- Railway Electrification EPC
- Underground Utility laying by HDD



Highlights

- Forward integration activity
- Aimed at high-margin projects

**Revenues
(FY'21)**
Rs 1,664mn

SKIPPER LIMITED
Performance Update

Q2 FY'22 Update





Q2 Fy'22 – Key Performance Highlights

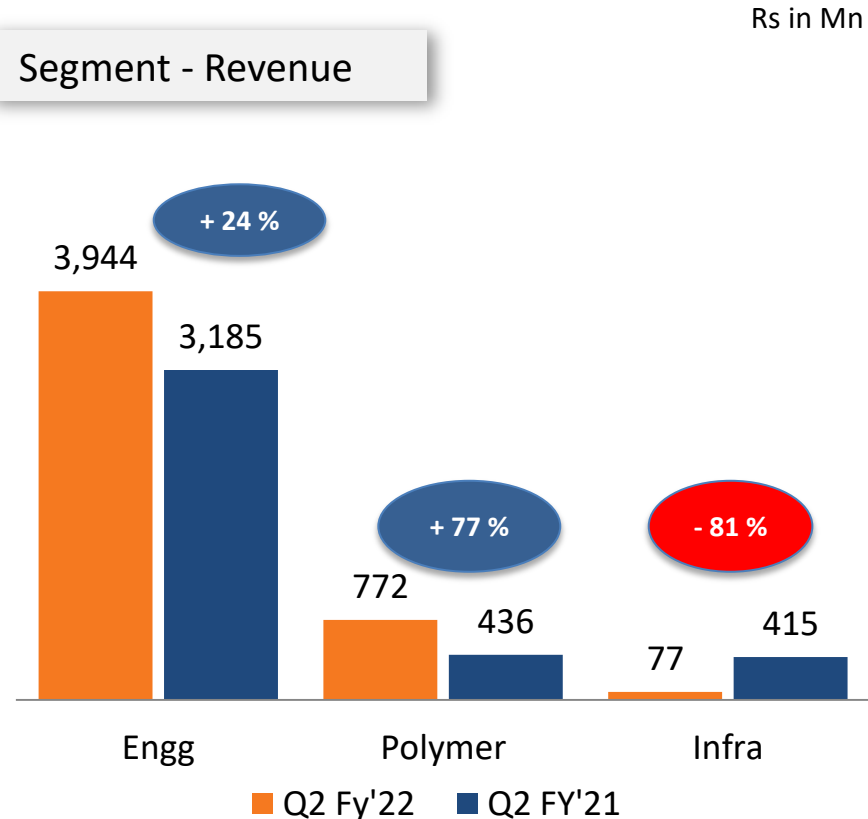
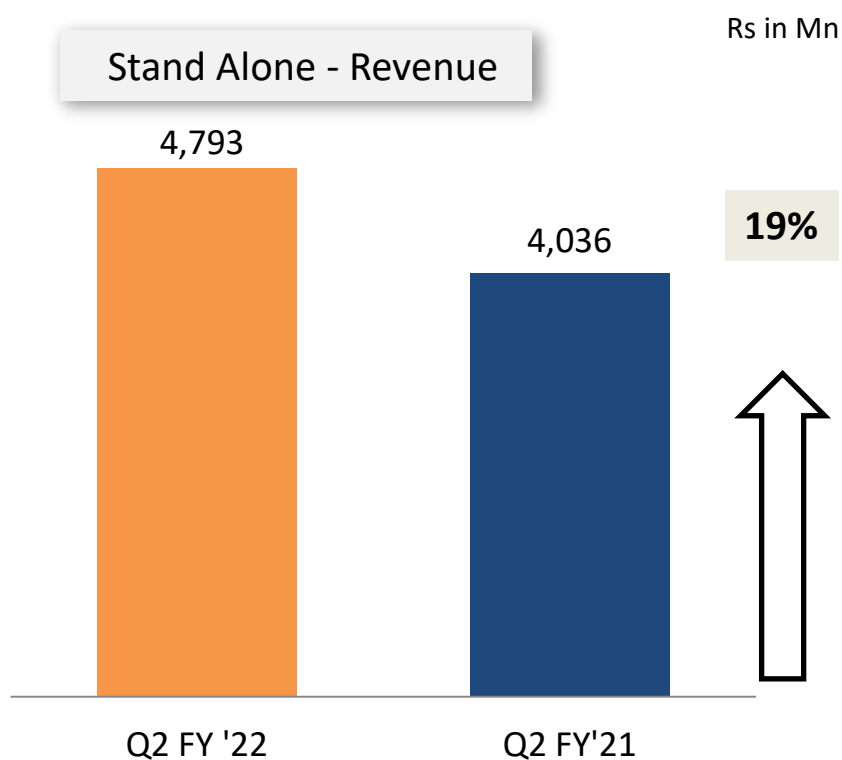
- ❑ Strong revenue performance across major business segments in spite of covid related challenges.
- ❑ Health and safety of employees and partners remains key focus area for the company ; Almost 100% employees in corporate office and plants vaccinated
- ❑ Plants operating with strict COVID-19 protocols with contingency planning; From Mid of July'21 all of the manufacturing units are operating at pre-COVID level of production
- ❑ Secured new order inflow of Rs 5,010 million during the quarter; Made inroads into the high potential Asia-Pacific and Middle East markets.
- ❑ Unprecedented commodity price rally in our Key raw material items (i.e Steel & Zinc) and higher ocean freight rates & Container unavailability adversely impacted profitability of our Engineering segment business.
- ❑ Forayed into the field of International EPC works ; Seeing strong demand traction in Telecom Tower Space in both domestic & International markets
- ❑ All new large T&D projects in domestic markets now comes along with Design and Load testing scope; Our new R&D centre will give us distinct advantage over competition.
- ❑ Actively pursuing projects worth Rs 35,000 million on international front and about Rs 18,000 million on the Domestic front.
- ❑ Added New products in the polymer pipe segment - Launched wide range of bathroom fittings and PTMT under the Skipper Pipes brand.



Financial Performance Q2& H1 FY'22

Rs in Mn

Sl	Profit & Loss Summary	Q2 FY'22	Q2 FY'21	H1 FY'22	H1 FY'21
1	Revenues	4,792.9	4,036.0	7,539.3	6,243.1
2	Reported EBITDA	419.4	477.6	586.4	568.1
	EBITDA Margins (%)	8.8%	11.8%	7.8%	9.1%
3	(+) Other Income	10.0	3.8	18.9	6.8
4	(-) Depreciation	121.9	119.6	241.1	225.9
5	(-) Finance Cost	249.6	171.9	447.9	345.0
6	Profit / (Loss) Before Tax (2+3-4-5)	57.9	190.0	(83.7)	4.1
	PBT Margins (%)	1.2%	4.7%	-1.1%	0.1%
7	Tax	14.4	65.5	(34.0)	(1.5)
8	Profit / Loss After Tax (6-7)	43.5	124.5	(49.7)	5.6
	PAT Margins (%)	0.9%	3.1%	-0.7%	0.1%



- Revenue up by 19 % YoY despite operational constraints in the wake of COVID-19 second wave
- Strong traction in polymer business ; Polymer share in overall revenue pie increased to 16%

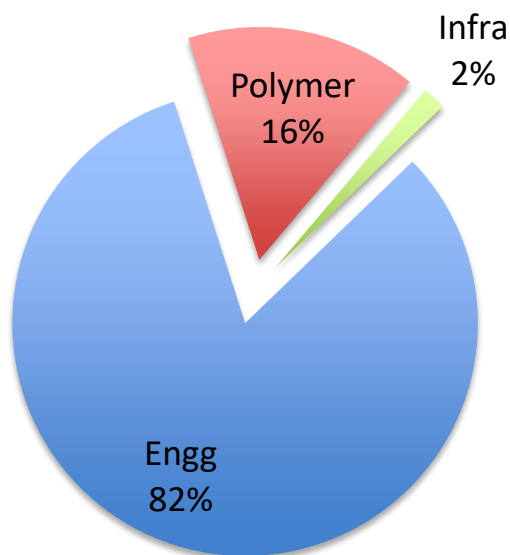


Q2 Fy'22 Profitability Margin was impacted on account of -

- ❑ Unprecedented commodity price rally in our key raw material (i.e Steel & Zinc) - had its impact on fixed price contracts;
- ❑ Increase in prices of other RM inputs like Fuel / Coal also impacted overall contracts in general ;
- ❑ Unavailability of export containers continues to remain a big challenge ; Delaying execution of export contracts **(Early signs of some ease are visible from October ' 21 onwards) ;**
- ❑ Increase in Freight cost and higher ocean freight container rates ;
- ❑ Continuing Port Congestion and delays making shipping transit time longer; leading to delayed collection & higher finance cost ;
- ❑ Higher incidence of fixed cost got absorbed on reduced revenue in Infrastructure segment; Conscious management decision to refrain from aggressive participation in EPC projects bidding last year in lieu of Covid 2nd Wave and volatile commodity price scenario.



Segment Performance Q2 & H1 FY'22



Segment	Profit & Loss Summary	Q2 FY'22	Q2 FY'21	Change %	H1 FY'22	H1 FY'21	Change %
Engg Products	Net Sales	3,943.8	3,184.6	23.8%	5,991.3	4,777.1	25.4%
	EBITDA - Operating	413.1	290.9	42.0%	524.7	379.7	38.2%
	% of Sales	10.5%	9.1%		8.8%	7.9%	
PVC Products	Net Sales	771.8	436.2	76.9%	1,274.8	747.5	70.5%
	EBITDA - Operating	4.9	31.1	-84.3%	8.7	10.3	-15.7%
	% of Sales	0.6%	7.1%		0.7%	1.4%	
Infra Projects	Net Sales	77.4	415.2	-81.4%	273.3	718.5	-62.0%
	EBITDA - Operating	(59.8)	17.3		(56.9)	(5.9)	
	% of Sales	-77.2%	4.2%		-20.8%	-0.8%	
Total	Net Sales Total	4,792.9	4,036.0	18.8%	7,539.3	6,243.1	20.8%
	EBITDA Total	358.2	339.3	5.6%	476.5	384.1	24.1%
	% of Sales	7.5%	8.4%		6.3%	6.2%	

Note: Segment EBITDA is net of Forex and includes allocation of un-allocable expenditure in pro-rata share of Sales and Capital Employed in their respective segment



Debt Details

Rs in Million

	30.09.2021	31.03.2021	Inc / (Dec)
Long Term Debt	2,059	2,563	(504)
Current Maturities of Long Term Debt	648	586	62
Total Long Term Debt	2,707	3,149	(442)
Short Term Debt	3,576	1,236	2,340
Gross Debt Level	6,283	4,385	1,898

- ☐ Unavailability of Export Containers led to some piling of Finished Goods
- ☐ Deliberately held high level of RM inventory so that a large portion of fixed type contracts get covered through the same which resulted into higher working capital utilisation ;
- ☐ Prices of key Raw materials have gone up by over 70-80 % during the year, leading to increase in working capital requirement.
- ☐ Efforts continues on cash flow & balance sheet consolidation, focus to improve bottom-line profitability



The company is taking all necessary steps to tackle & neutralise the impact of this temporary RM volatility / Container Freight issues and protect margins -

Mitigation Strategy

Securing Newer Contracts at elevated commodity price level

Considering lack of container availability at ports and High Sea Freight rates – Company is trying to abstain itself from entering into Exports CIF Commitments, secured majority of newer export contracts on FOB terms only

Taking advantage of low working capital debt level of company to keep higher raw material inventory so that a larger portion of the fixed price contracts are covered with the inventory

Hedging Zinc & Flat Steel Exposure through Vendor & commodity exchange

Negotiating firm prices contract with raw material supplier for longer duration

Expanding Raw material supplier base

Forging Tie-ups with major raw material suppliers with minimum up-liftment commitment to gain maximum possible rebates and discounts.



THE INVISIBLE POSITIVES IN THE DECLINE

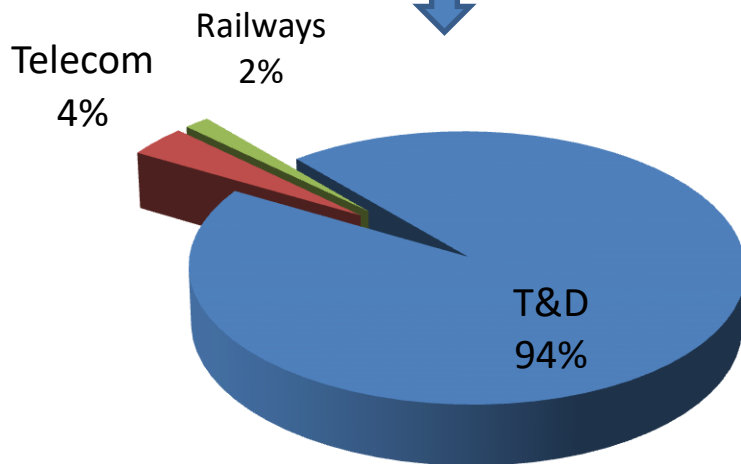


- 1** Skipper reported consecutive q-o-q growth in order book inflow; Secured orders in excess of Rs 5,010 mn during the quarter
- 2** Skipper continued to increase its non-India exposure; received first time order and enquiry from a number of countries
- 3** Only polymer pipe company to successfully implement Theory of Constraints (TOC) into its operation ;
Retailer touch points increased 10(X) fold in last 2 year period
- 4** Skipper continued to exercise a bidding discipline; abstained from irrational bidding; protected Balance Sheet integrity



Engineering Products – Order Book Composition – Sep 2021

**Total Order Book
Rs 21,220 million**

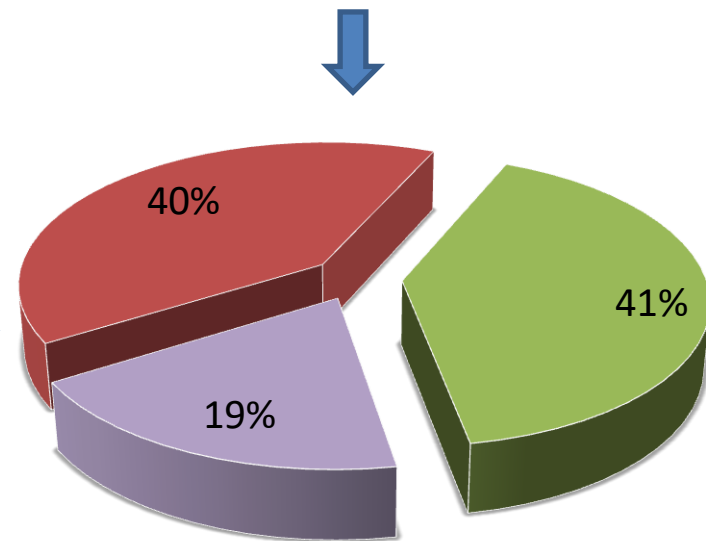


Domestic – 61%

Export – 39%

**T&D Order Book
Rs 20,060 million**

T&D Breakup



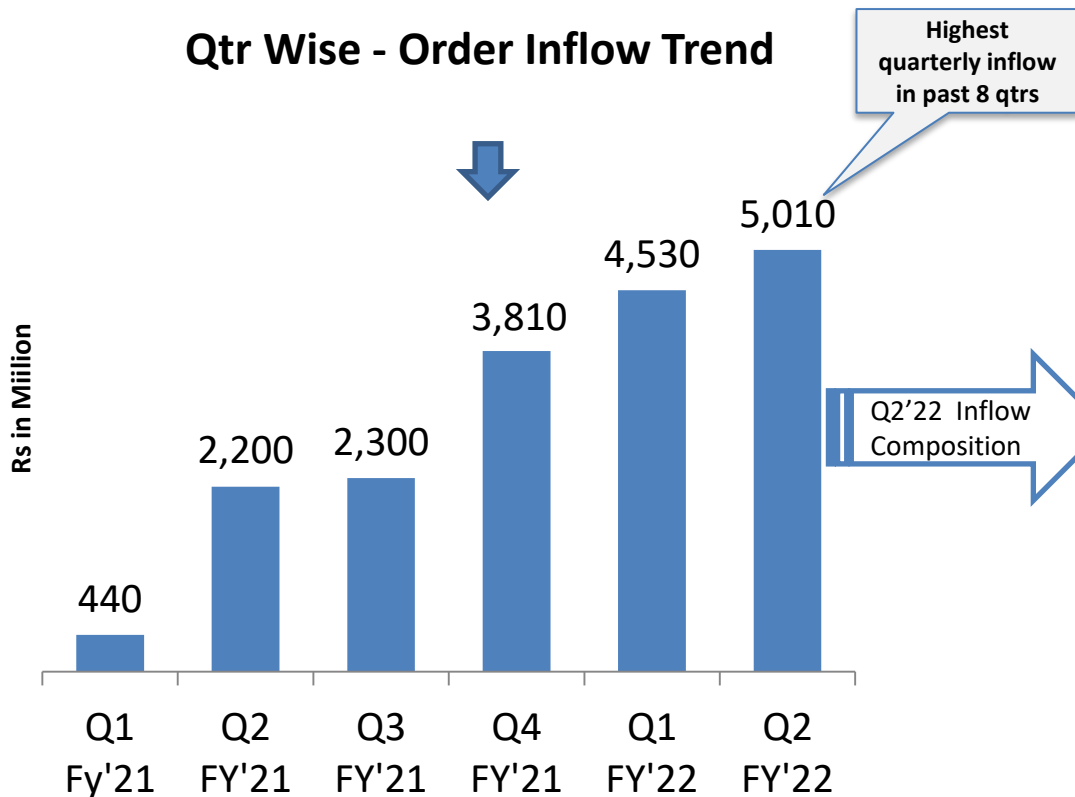
PGCIL SEB & Others Export



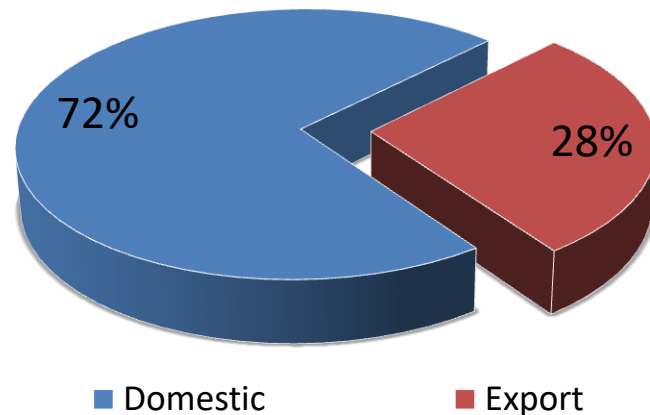
Engineering Products – Order Inflow Composition

- New Order Intake of Rs 5,010 million in Q2 FY'22 & Rs 9,540 million in H1 FY'22 for engineering products supply from PGCIL, SEB's & Telecom Players and for various supplies across Asia Pacific, Africa and LATAM markets
- T&D Order Book well diversified between Power Grid, Domestic SEB / Private players and international
- Strong growth trajectory in Telecom in both domestic & International markets; Made inroads into 3-4 newer export geographies which were earlier dominated by Chinese players

Qtr Wise - Order Inflow Trend



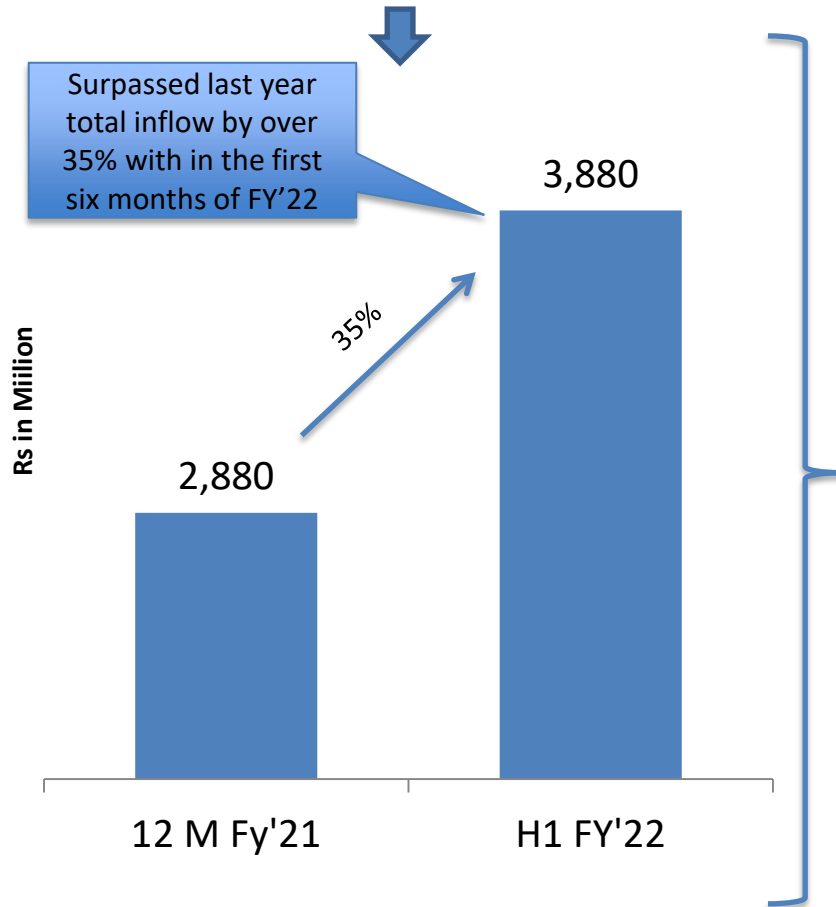
Q2 FY'22 Inflow Composition Rs 5,010 million





Rising Export Share Inflow

Export Order Inflow Trend



Positioned to grow export business to 75% of Engineering revenue in next 2 years

- Secured new export orders in excess of Rs 3,880 million during H1 Fy'22 and Rs 6,030 million in the trailing 12 months (TTM)
- Made inroads into Asia Pacific and West African market with 3-4 large utilities, which were earlier dominated by Chinese players.
- Secure a large size contract in Middle east ; In advanced stages of negotiation to secure another
- Customers have now accepted this Commodity price shift - **resulting in finalization and awarding of long pending order with them.**
- Majority of New Transmission lines are now getting built to cater renewables; leading to shorter execution cycle and faster supplies to meet project deadlines.
- Bid to - order life cycle which got prolonged due to covid led disruption and commodity price volatility are now showing signs of getting back to normalcy



**Strong Bidding Pipeline of 48,000 Million as on 30th Sep 2021;
International – 35,000 Mn & Domestic - 18,000 Mn**

- **Expecting International Ordering & Execution to gain pace in H2 FY'22;**
- **In advanced Stages of negotiation to secure some good size International contract**
- **Large pent up demand in domestic T&D ; Ordering continues to remain muted**
- **Increased focus on building up Engineering capabilities**

International

- ✓ Growing global competitiveness; Focusing on international markets to drive the ordering growth;
- ✓ Strong Anti China Sentiment; and global supply chain now actively looking for reducing their dependence on China is a great positive outcome of this crisis ; will bring more opportunities on our way
- ✓ Majority of New Transmission lines are now getting built to cater renewables; leading to shorter execution cycle and faster supplies to meet project deadlines.

Domestic

- ✓ The domestic T&D activities are showing signs of rebound, Company's Order bidding pipe line has increased to 18,000 mn in Q2 Fy'22 against 13,000 mn in Q1 Fy'22
- ✓ Large bunching up of order that remained postponed + Rs 500,000 million of GEC related projects to come up for bidding will provide much needed boost to the domestic transmission industry
- ✓ Tender Pipeline continues to stay strong, Many tenders in the domestic T&D market which got postponed - now expected to be concluded in next few months.
- ✓ Strong traction in domestic telecom on account of 5G Rollout / High bandwidth usage.
- ✓ Tightening of quality norms by Indian railways will benefit large organised manufacturer; In process of adding more manpower and building capabilities to target upcoming Railway Electrification Projects



With Major Approvals in place and strong relationship been developed with Major USA EPC players and Utilities over the past few years, Company is well poised to target and get benefitted from this massive Power T&D investment plans.

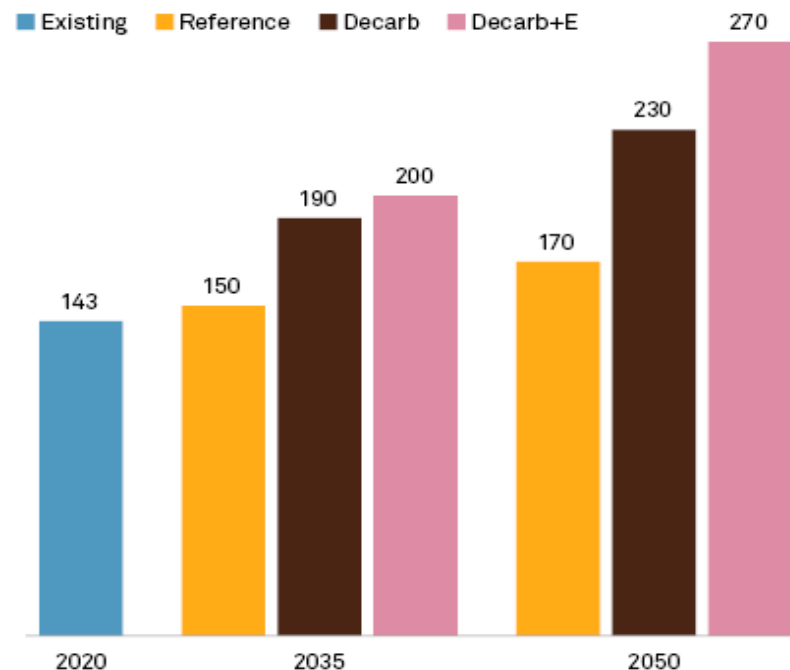
Big Opportunity – USA

With bipartisan support, the U.S. House of Representatives passed the US \$ 1.2 Trillion Infrastructure Investment and Jobs Act on 5th November, 2021.

- ❑ The Bipartisan Infrastructure Deal's more than \$ 65 billion investment includes the largest investment in clean energy transmission and grid in American history.
- ❑ Plans to upgrade the power infrastructure by building thousands of miles of new, resilient transmission lines to facilitate the expansion of renewables and clean energy, while lowering costs.
- ❑ Studies have estimated the U.S. will need to double or even triple its transmission capacity to decarbonize the country's economy.

Power transmission capacity may need to increase nearly 90% by 2050

(terawatt-miles)



As of Sept. 8, 2021.

Reference assumes business-as-usual.

Decarb assumes policies drive a 95% reduction from 2005 levels in the grid's carbon dioxide emissions by 2035 and a 100% reduction by 2050.

Decarb+E goes further by including large-scale electrification of end uses.

Source: U.S. Department of Energy

Source : S&P Global



One Sun One World One Grid Project (OSOWOG)

- India and Britain signed a solar power initiative, called **One Sun One World One Grid**, that envisions an interconnected transnational solar grid.
- OSOWOG is India's initiative to build a global ecosystem of interconnected renewable energy resources
- A consortium steered by French state-run power utility firm Électricité de France SA (EDF) has been awarded the tender of crafting the road map for India's ambitious global grid. The other members of the consortium are France's Application Européenne de Technologies et de Services (AETS), and India's The Energy and Resources Institute (TERI).
- The three-member consortium will develop OSOWOG's long-term vision, implementation plan, road map, and institutional framework including a technical and financial proposal.
- By 2050, the grid aims for 2600GW of interconnection.

Strong Opportunity in India's T&D Sector

- Scaling up India's ambitious agenda to combat climate change , Prime Minister Mr Narendra Modi delivering his national statement at the COP 26 summit has announced India's plan to increase its non fossil energy capacity to 500 GW and meet 50% of its energy requirements through renewables energy by 2030
- India's ambitious target of 500 GW addition against current 100 GW - opens up an unprecedented opportunities to the tune of USD 221 billion by 2030.



SKIPPER'S POLYMER BUSINESS



Polymer
manufacturing
capacity of 51,000
MTPA



Plants invested
state-of-the-art
manufacturing
technology



Guwahati Fittings
Plant enjoys tax
exemption



Among few Indian
companies assured
of CPVC for pipes
manufacture



One of few Indian
companies with
NSF certification

Quality certifications

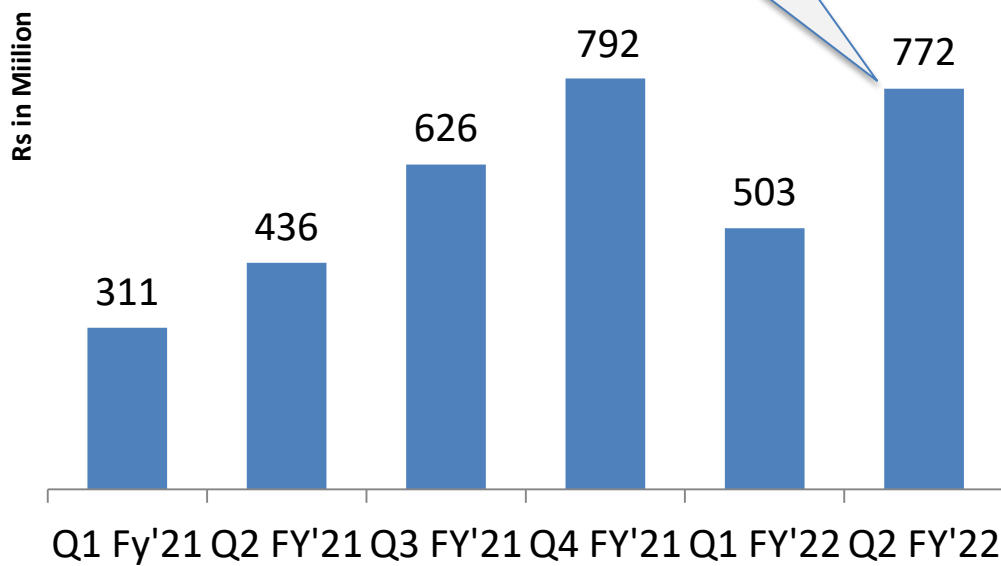
- ASTM D-1785, ASTM D-2467, ASTM D-2846 • IS: 12818 • IS: 13592 • IS: 4985 • IS: 15778
- IS: 13592 • IS: 14735 • IS: 10124 • IS: 14182 • NSF



Polymer – Improving Revenue Performance

TTM Revenue of Rs 2,693 million

Highest Ever Q2 Revenue Performance



Major Highlights

- ❑ Only Polymer Pipe company in India to implement TOC into its operation
- ❑ Growing National Presence ;
- ❑ Deriving 75% of overall revenue through TOC channel network
- ❑ Total Retailer Touch points in excess of 22,000 plus (nos) in Sep'21
- ❑ Retailer touch points increased 10(X) fold in last 2 year period
- ❑ Total Monthly Billed Retailers of 5,000 plus (nos)
- ❑ Focus on Plumbing Portfolio; 70 :30 Revenue mix share of Plumbing: Agriculture



OUR USP

Skipper is the only Indian polymer pipe company to implement Theory of Constraints (TOC) approach in an organized manner

Directed to empower the supply chain processes and systems

- Partnering benefits:
- Exponential Sales Growth & Gain in Market Share
- Robust Processes & Systems in place to improve profitability
- Consistent availability of entire range of products at billing points
- Improvement in working capital cycle and reduction of inventory days
- Gain of more output from the current capacity
- Improvement in ROI to dealers and distributors

SKIPPER Flow
BATH ACCESSORIES



PTMT BATH ACCESSORIES

SKIPPER Bravo
BATH ACCESSORIES Clean & Fresh



CISTERN & SEAT COVER



Style

THAT SUITS YOUR BATHROOM

JADE

Master Product in Bathroom



PILLAR COCK
300008771
MFP: 1,740.00



WALL MIXER WITH
POUCH ON SHOWER
300008752
MFP: 6,100.00



BID COCK
300008753
MFP: 1,300.00



LONG BODY BID COCK
300008754
MFP: 1,600.00



2 WAY BID COCK
300008775
MFP: 1,600.00



CON STOP COCK
15MM
300008777
MFP: 1,200.00



CON STOP COCK
20MM
300008778
MFP: 1,300.00



BINK COCK
WALL MOUNTED
300008779
MFP: 2,170.00



PILLAR COCK
W/IN NECK
300008740
MFP: 2,410.00



CENTRAL HOLE
BASIN MIXER
300008741
MFP: 3,600.00



ANGULAR COCK
300008796
MFP: 1,500.00



BINK NECK
(RIGHT HAND)
300008742
MFP: 3,300.00



JADE Wall Mixer 1 in 1
With Two-ON Shower
300009002
MFP: 6,300.00



JADE Sink Mixer With
Swinging Spout
300009005
MFP: 2,870.00

ABALONE

Master Product in Bathroom



PILLAR COCK
300008747
MFP: 300.00



BID COCK
20MM
300008748
MFP: 530.00



BID COCK 1 in 1
300008749
MFP: 1,100.00



CON STOP COCK
15MM
300008740
MFP: 1,100.00



CON STOP COCK
20MM
300008746
MFP: 1,100.00



ANGULAR COCK SR
300008744
MFP: 640.00



ANGULAR COCK SR
300008745
MFP: 500.00

ESSENTIALS



BOTTLE TAP 1/2"
300008713
MFP: 1,300.00



INLET FLOOR
SHOWER BODY
UNDER PART
300008715
MFP: 5,000.00



WALL MIXER C/W/ON
30000874
MFP: 400.00



WALL MIXER C/W/ON
30000874
MFP: 400.00

SHOWER



OVER HEAD
SHOWER DELTA 404
300008764
MFP: 300.00



OVER HEAD SHOWER
TUPAZ - 4" Round
300008765
MFP: 340.00



OVER HEAD SHOWER
JDS - 4" Round
300008761
MFP: 570.00



OVER HEAD SHOWER
DOOR - 4" Plain Round
300008802
MFP: 400.00



OVER HEAD SHOWER
JDS - 4" Plain Round
300008803
MFP: 400.00



OVER HEAD SHOWER
4" JADE ROUND
300008807
MFP: 340.00



SHOWER ARM
ROUND 1/2" IN
300008808
8" - MFP: 500.00
10" - MFP: 550.00



HAND SHOWER
ROUND 1 1/2" IN
300008809
8" - MFP: 500.00
10" - MFP: 550.00





PERFORMANCE OUTLOOK

- ❑ Almost 80% of our old legacy engineering export orders secured on CIF basis have got executed in H1 Fy'21 ; Going forth most of the revenue execution will take place from newer contracts which were secured on FOB terms aiding to better margin performance
- ❑ Stronger expected execution in both Engineering & Polymer segment going forth coupled with Productivity and cost reduction initiatives at the plant and site level are expected to further improve efficiency in operations
- ❑ Expect good traction in both Domestic and International TL orders
- ❑ Continuing efforts to further strengthen the international T&D order book ; positioned to grow exports to 50% of engineering revenue in current year (FY'22) and to 75 % in next 2 years
- ❑ Implementation of TOC in both Engineering and Polymer business to significantly improve its working capital cycle and bottom-line profitability

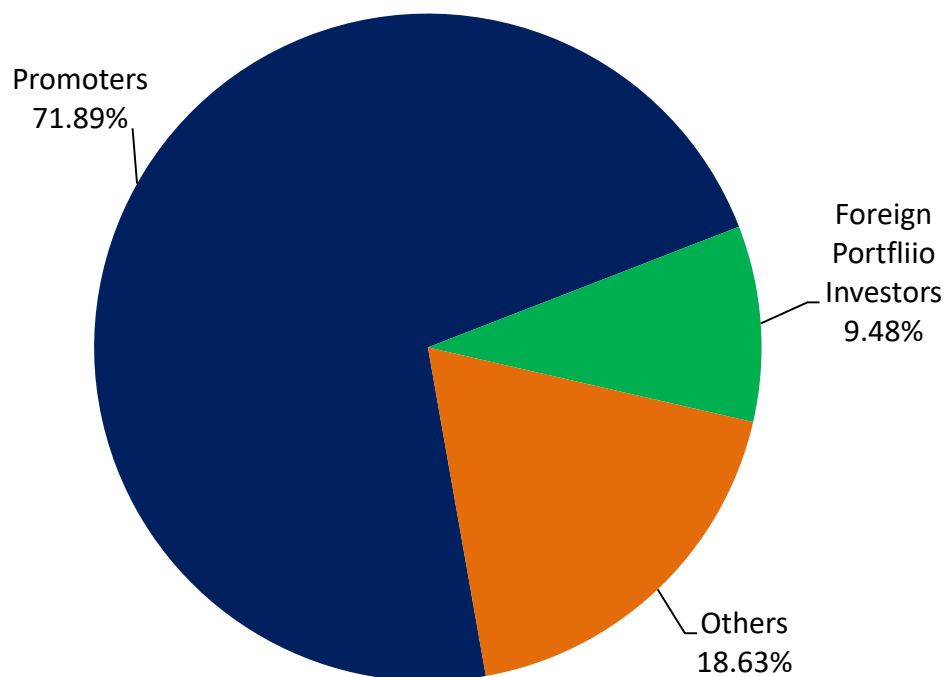


FY'22 - Guidance

- ❑ **Revenue Guidance** - Company expects to clock double digit annual revenue growth in FY'22 on back of strong pending execution of engineering contracts and strong polymer segment performance
- ❑ **Order Inflow** – Targeting Inflow of Rs 18,000 - 20,000 million in full year, largely on account of international export orders and rebound in Domestic T&D ordering



Shareholding pattern as on 30th Sep 21



Major Institutional Shareholders As on 30th Sep 21

Name	%
Baillie Gifford - Pacific Horizon Investment Trust	4.49%
Ocean Dial Asset Management India (ICGF)	4.08%
Univeral Golden Fund	0.54%
Polus Global Fund	0.24%



Future Ready





FOCUS ON GROWING EXPORTS

- **Optimistic outlook:** Positioned to grow exports to 50% of Engineering revenue in current year (FY'22) and to 75 % in next 2 years.
- **Opportunity-ready:** Certified by prominent international organizations for confidence-enhancing certifications
- **Established traction:** Working with over 100 Global EPC player ; Enlisted 10 prominent customers in past 12 months
- **In House Design Capability:** With in-house design capability and human capital, we are able to add more value into the projects we bid, offering innovative, bespoke and cost-effective design solutions.
- **Creditable beginning:** first-time order and enquiries from USA, Germany, Spain, South Korea, Uruguay, Paraguay, Romania, Croatia, Mexico, Panama, Bolivia, Poland, Afghanistan, Russia, Australia and East / West African countries among others
- **Competitiveness:** Strong Anti-Chinese Sentiment and gradual decoupling from China is also causing many projects to seek alternative supply chains, giving further fuel to business potential coming our way.
- **Brand Positioning:** Our recently set up R&D Centre and Tower Testing Station have vastly improved our brand positioning in the export markets, helping us to be taken as a serious contender.

International certifications

Certification	Country
CFE/LAPEM	Mexico
CWB	Canada & USA
DEWA	Dubai
ROHAS	Malaysia
CE CERTIFICATION	Europe
ACHILLES/STATNET	Nordics
Saudi Electric Company	Saudi Arabia
The Jordanian Electric Power Company Ltd	Jordan
RETIE	Colombia
EETC	Egypt
BPC	Bhutan
KETRACO	Kenya
TCN	Nigeria
NGCP	Philippines
DAST	European Union



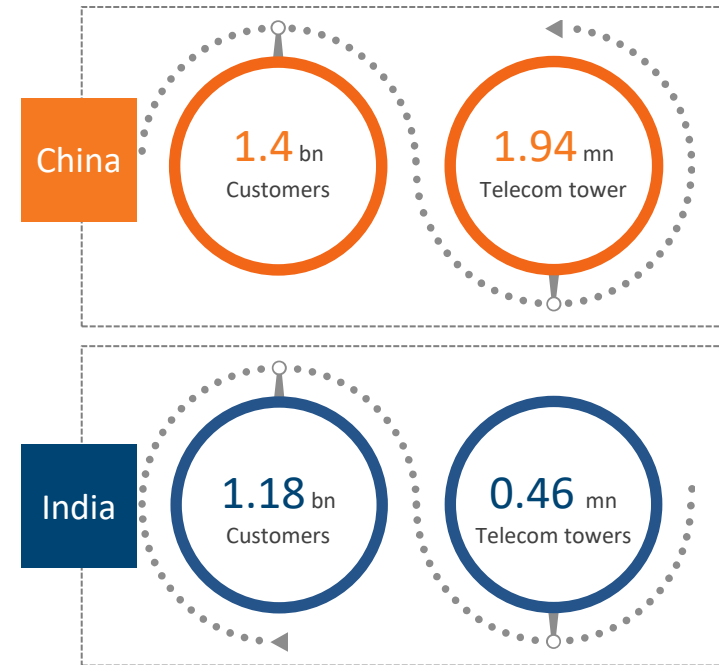
SKIPPER IS CLEARLY POISED TO BE IN THE WINNING SPOT IN THE INTERNATIONAL T&D SECTOR

- Skipper is the highest accredited manufacturers in India for supplying to global markets
- Largest and lowest cost manufacturer out of India and one of the lowest globally
- In between 2005 – 15 Skipper supported multiple Indian non integrated T&D EPC Contractors (holding major market share) with low cost reliable Transmission Tower supplies (Towers are almost 50% of the value of any project).
- Currently replicating the same format in International markets with major International EPC contractors, helping them leverage their relations with the Utilities better
- Increase in approvals such as CWB (North America), CE & DAST (Europe), Lapem (Central America & Mexico), DEWA (Middle east), Achilles (Nordic countries) and Sirim (South East Asia) which gives it better access to T&D business in these regions. Continuously increasing , Utility approval list with more key utilities in the European markets



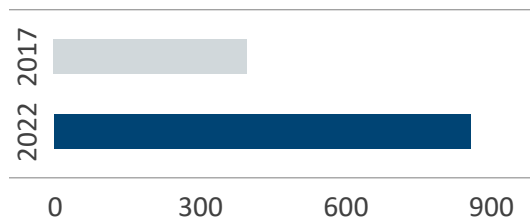
TELECOM TOWER

- India needs around 100,000 additional towers to address growth
- National Telecom Policy aims to inspire \$100 bn investment in five years
- India's 30 per cent broadband penetration leaves large headroom
- Sector added 65,000 mobile towers in two years
- Expansion of 4G, 5G, Artificial Intelligence, Virtual Reality, Internet of things and M2M among others are driving the need for more towers

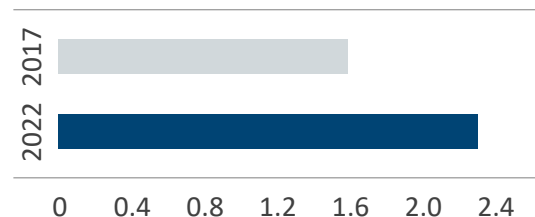


INDIA ON THE CUSP OF MOBILE DATA EXPLOSION

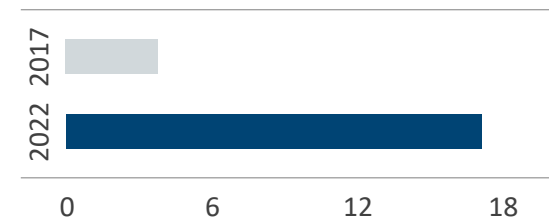
India's smartphone users has more than double by 2022 (in mn)



The number of connected devices will boom in India (in bn)



Average mobile data consumption per month in India (in gigabytes)





SKIPPER IS CLEARLY SET TO BE IN THE WINNING SPOT IN THE TELECOM SECTOR

- Large engineering capacity to support manufacturing of Telecom structures
- Proximity to focus Telcos markets - East & North East
- Tie up with one of world's leading tower design company - Ramboll
- Long standing relationships with major telecos in India and abroad





Skipper boasts of India 's largest Tower & Monopole Load Testing Station -

- All new large T&D projects in domestic markets now comes along with Design and Load testing scope;
- Our new R&D centre will give us distinct advantage over competition.
- Facility running at 100% capacity

Few Power Transmission Towers & Monopoles tested at our Testing Station



765kV S/C Monopole



220kV Transmission Tower



765kV Transmission Tower



400kV D/C Quad Moose Monopole



500kV Transmission Tower



More than 2,200 + Employees and Workers were Vaccinated



40 YEARS OF CREATING
#InfinitePossibilities



VFOR VACCINATION / VFOR VICTORY
I'M VACCINATED



#SkipperCares

#SkipperCares



An initiative by
Skipper Limited to keep
our community healthy.

Upload the picture on your
social media profiles with
#SkipperCares & tag us

Instagram: @skipperpipes | Facebook: @skipperpipes | Twitter: @SkipperPipes | LinkedIn: @skipperpipes



Thank You

For any queries please contact:

Aditya Dujari (Investor Relations)

Skipper Limited 3A, Loudon Street, 1st Floor, Kolkata 700 017

E-Mail: aditya.dujari@skipperlimited.com

Tel: + 91 33 2289 2327/5731 Mobile: 9830806906