



NLC India Limited

(*Navratna* - Government of India Enterprise)
Registered Office: No.135, EVR Periyar High Road, Kilpauk, Chennai-600 010.
Corporate Office: Block-1, Neyveli-607 801, Cuddalore District, Tamil Nadu.
CIN : L93090TN1956GOI003507, Website: www.nlcindia.in
email: cosec@nlcindia.in Phone: 044-28369139



Lr. No. NLC/Secy/Reg. 30/2026

Date: 27.05.2026

To National Stock Exchange of India Ltd. Plot No. C/1, G Block, Bandra-Kurla Complex, Bandra (E), Mumbai - 400 051. Scrip Symbol : NLCINDIA	To BSE Ltd. Phiroze JeeJeebhoy Towers, Dalal Street, Mumbai - 400 001. Scrip Code: 513683
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Sir/Madam,

Sub: Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 - Institutional Investors Meet-Reg.

Pursuant to Regulation 30 of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 and in continuation of our letter dated 21.05.2026, we furnish herewith a copy of Investors Presentation for your information and record.

Thanking You,

Yours Faithfully,
For NLC India Limited

**Company Secretary &
Compliance Officer**



Pioneering a Sustainable Future

Corporate Presentation
and Financials

FY2026



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01 | Highlights of the Year



Group Financial Highlights



₹17,490 Cr

Revenue from Operations

★ Highest Ever

▲ 14% YoY Growth

₹3,769 Cr

Profit After Tax

★ Highest Ever

▲ 39% YoY Growth

₹9,131 Cr

Capex

★ Highest Ever

▲ 18% YoY Growth

₹21,525 Cr

Net Worth

▲ 15% YoY Growth

38.5%

Dividend

Interim Dividend – 36.0%

Final Dividend¹ – 2.5%

★ Highest Ever in 6 Years

₹53,774 Cr

Market Capitalisation

★ All-time-high Share Price of ₹387.80 on NSE (as on 14th May 2026)

★ Highest Ever



¹Subject to shareholders' approval.

Operational Highlights



19.14 MT

Annual Coal Production
From Talabira II & III OCP

★ Highest Ever

17.69 MT

Annual Coal Dispatch
From Talabira II & III OCP

★ Highest Ever

963 MW

Capacity Additions
660 MW Thermal +
303 MW Renewables

2.26 BU

Renewable Generation
Green Power Generation
in FY26

★ Highest Ever

9 MTPA

Pachwara South Coal Mine

Coal Production
Commenced in March 2026

Award

RE Tender Awarded to NIRL

NIRL secured 2 GW RE Projects
+ 3300 MWh BESS across
PSPCL, NHPC, GUVNL, SECI,
NCRTC, TNGECL and NTPC

Two JVs

New JV approved

NIRL × NCRTC and
NIRL × MAHAPREIT for
Renewables across India



02 | Corporate Profile



Built to Last, Built to Lead



Established in 1956 and headquartered in Neyveli, Tamil Nadu, we are a Navratna enterprise of the Government of India with nearly seven decades of operations in mining and power

- ★ A leader in lignite mining and power generation, with a diversified portfolio across coal mining, thermal, renewables, critical minerals, and consultancy
- ★ Operates 6 mines and 17 Power Plants
- ★ First CPSE to cross 1 GW of solar capacity



Vision

To emerge as a leading Mining and Power Company, with social responsiveness accelerating Nation's growth



Mission

- ★ Continue to develop and sustain expertise in Power and Mining with focus on growth and financial strength
- ★ Be socially responsive, achieve sustainable development and be sensitive to emerging environmental issues
- ★ Strive to achieve excellence in processes and practices
- ★ To nurture talent, encourage innovation and foster collaborative culture

26 yrs

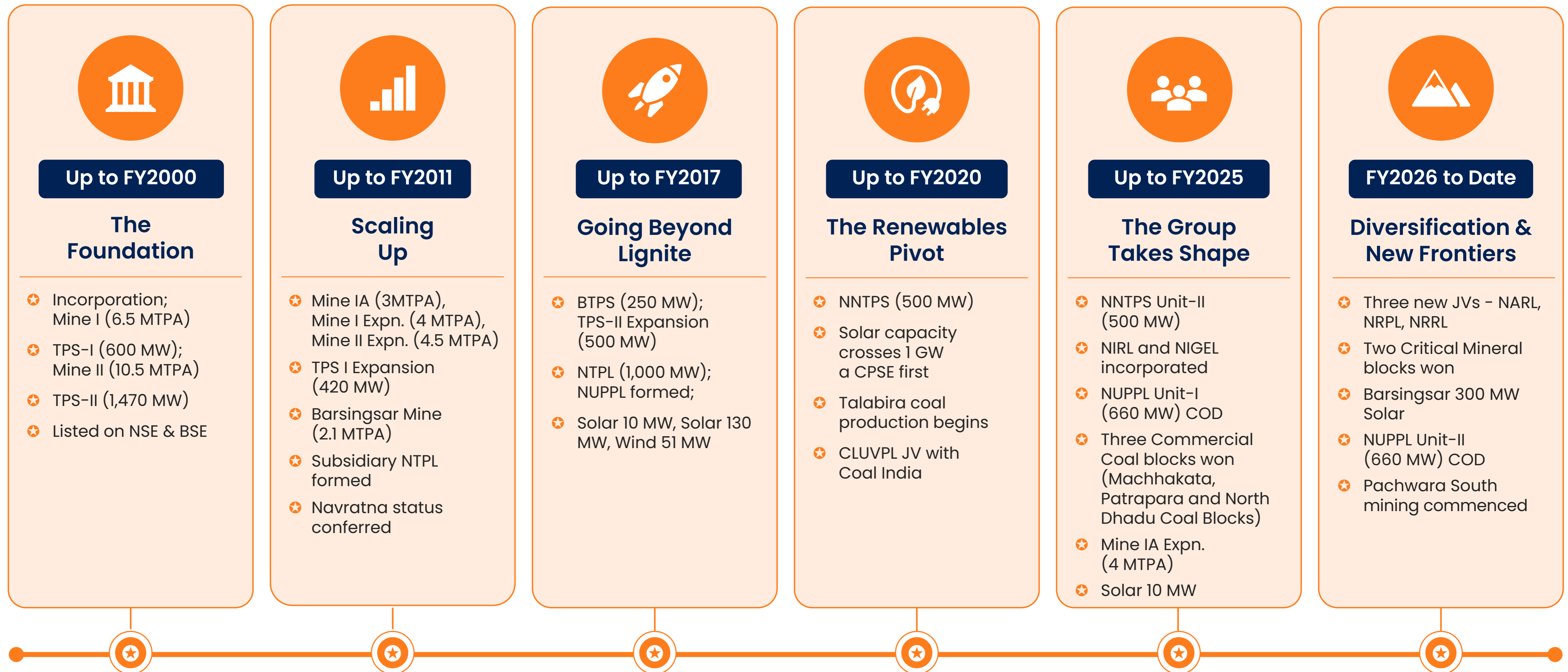
Consistent Dividend

48 yrs

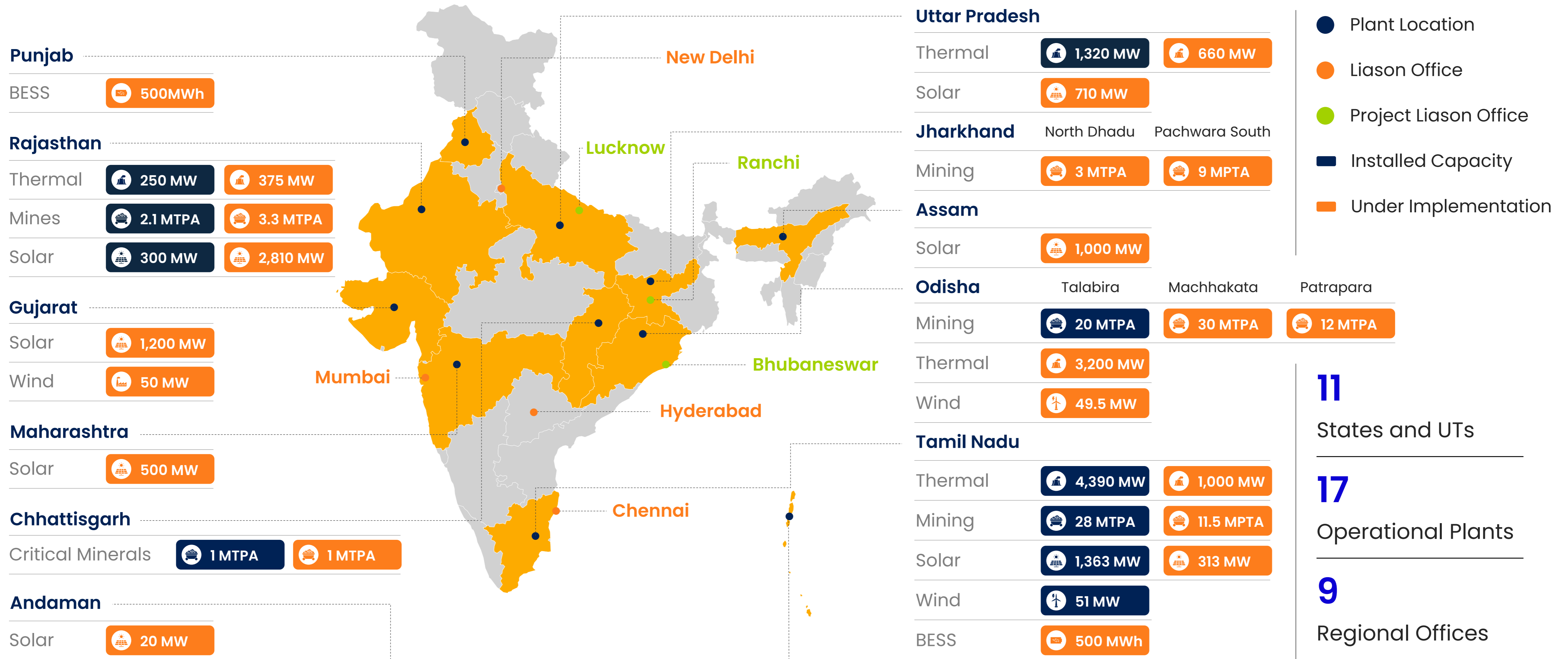
Consistent Profitability

Seven Decades, Six Chapters

From a single mine in Neyveli to a PAN-India energy platform; the inflection points that shaped NLCIL



PAN India Presence: Operations in 11 States



- Plant Location
- Liason Office
- Project Liason Office
- Installed Capacity
- Under Implementation

11 States and UTs

17 Operational Plants

9 Regional Offices

Composition of Board of Directors



Shri M. Prasanna Kumar
Chairman & Managing Director

Part-time Official Directors



Shri Sanoj Kumar Jha (IAS)
Additional Secretary, Ministry of Coal,
Government of India



Shri Mangat Ram Sharma (IAS)
Additional Chief Secretary,
Government of TN, Energy Department

Functional Directors

**Dr. Suresh
Chandra Suman**

Director
(Mines)



**Shri Samir
Swarup**

Director
(HR)



**Shri
M. Venkatachalam**

Director
(Power)



**Dr. Prasanna Kumar
Acharya**

Director
(Finance)
& CFO



**Shri Rajesh Pratap
Singh Sisodia**

Director
(Planning
& Projects)



Value Created, Year on Year



While our book value compounded steadily, our market price grew nearly 5x over five years, reflecting consistent profitability and reinvestment

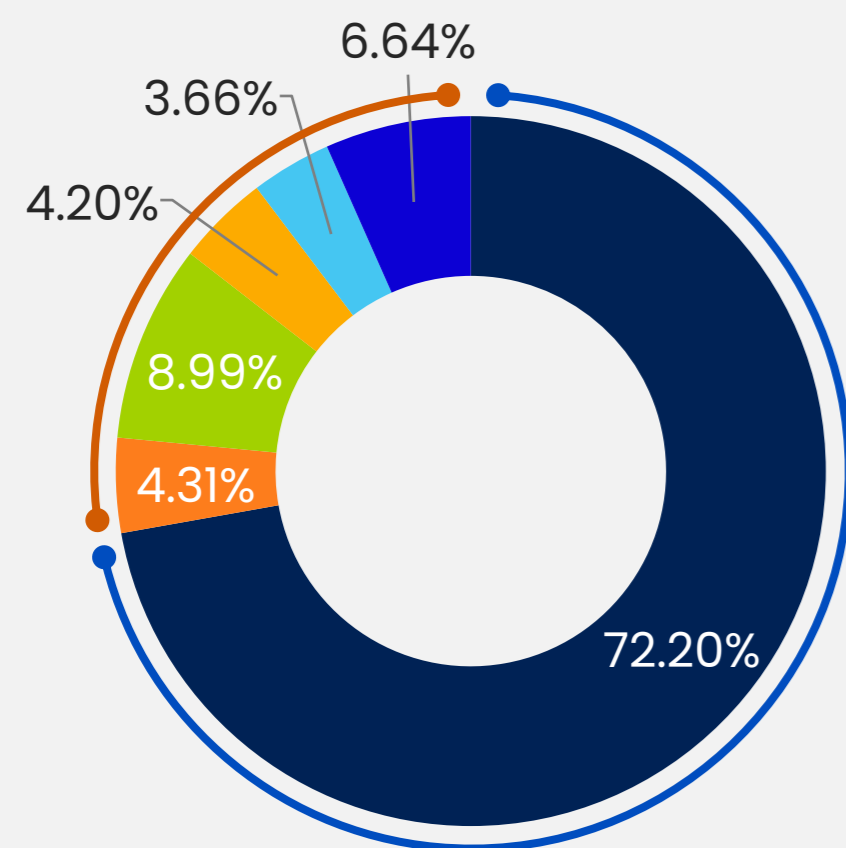
3,12,201

Total Shareholders

₹48,921 Cr

Market Capitalisation

Shareholding Pattern



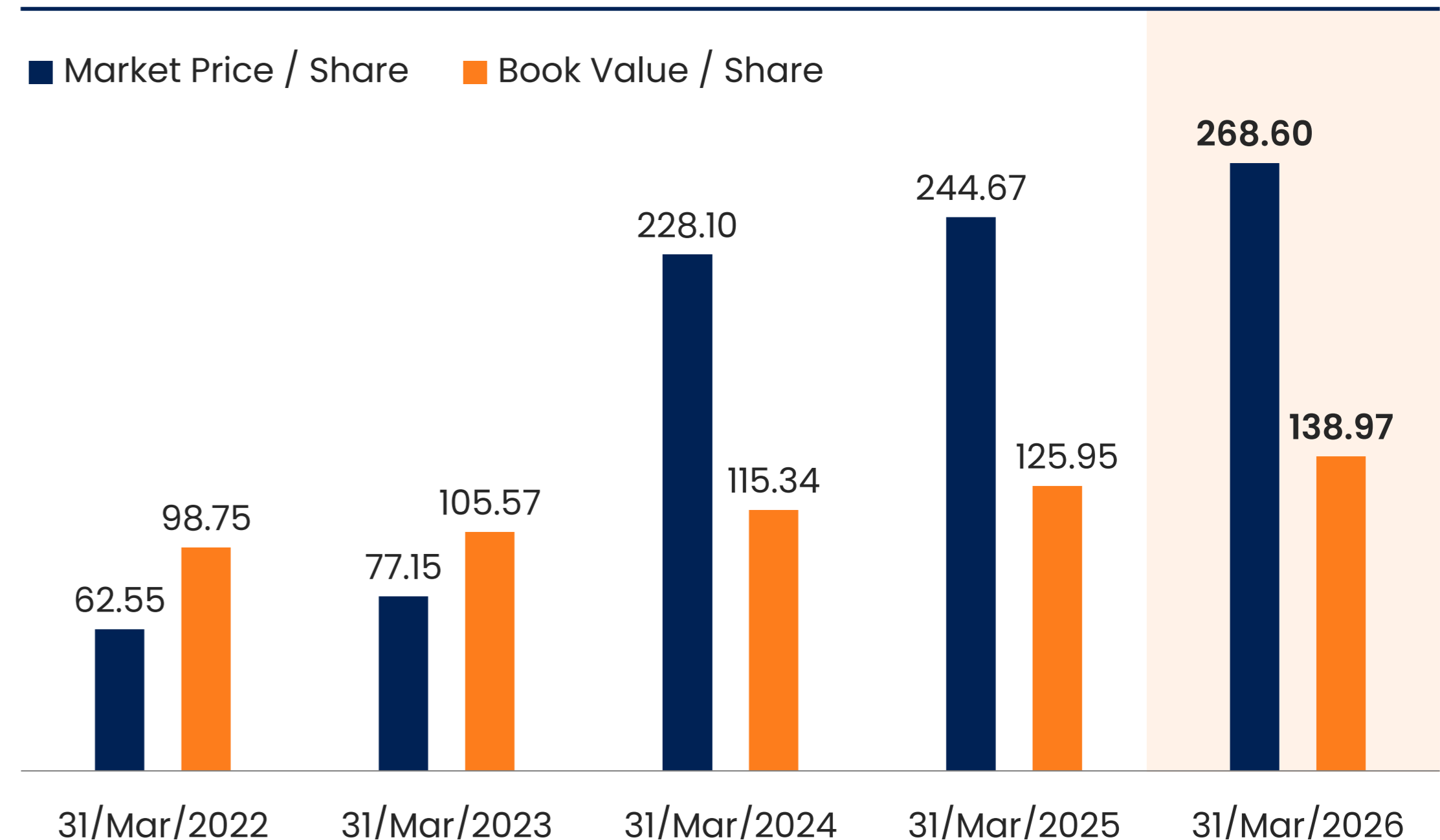
Promoter & Promoter Group
 Public

Shares

Government of India	1
State Government Sponsored Institutions	6
Mutual Funds, FIs & Banks	89
Foreign Portfolio Investors	150
Insurance Companies	17
Others	3,11,938

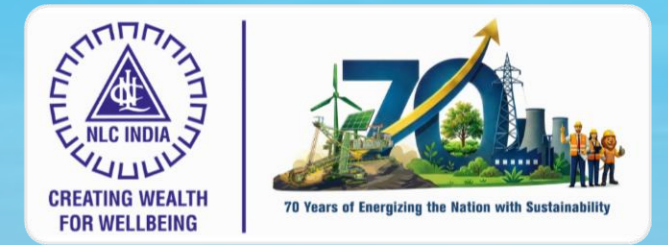
Historical Share Performance (₹)

Market Price / Share
 Book Value / Share

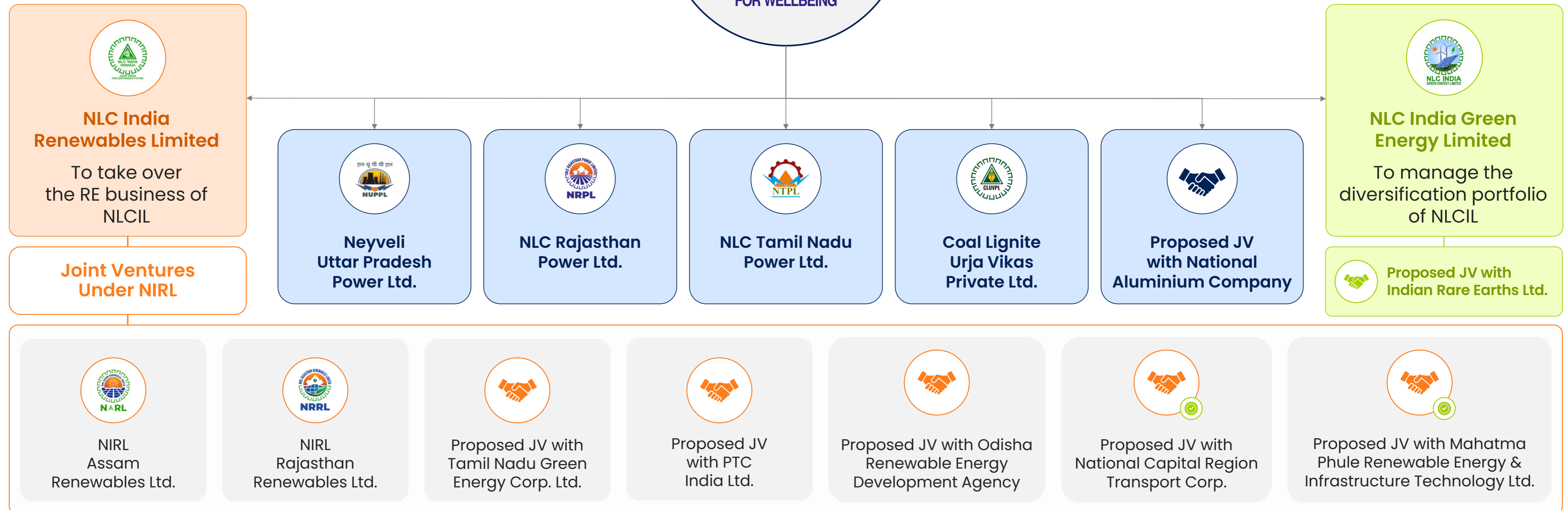


03

Business Overview



Structured to Scale



The Green Growth Engine



Incorporated on 14 June 2023, NIRL is our wholly owned subsidiary that consolidates the Group's renewable assets and drives our build-out toward 10 GW of renewable capacity by 2030

1,734 MW

Operational Projects

5,810 MW

Renewable projects currently under implementation

3,885 MW

Renewable capacity tied up through Joint Ventures

What NIRL Brings Together

- Asset Consolidation:**
 Seven operational renewable projects transferred from NLCIL under a Business Transfer Agreement
- Wide Ranging Portfolio:**
 Solar and wind projects spread across multiple states including TN, Rajasthan, Assam, Gujarat & Andaman
- Emerging Green Technologies:**
 A long-term roadmap into pumped storage, green hydrogen and EV charging infrastructure

Project Portfolio

Operational		1.8 GW
Solar	10 MW	
Ground Mounted Solar	10 MW	
Wind	51 MW	
Solar	130 MW	
Solar	500 MW	
Solar	709 MW	
Andaman Solar	20 MW	
Barsingsar Solar [^]	300 MW	
Roof Top Solar (Total)	4.06 MW	

Under Construction & Development		5.8 GW
CPSU Solar	200 MW	
Solar, Gujarat	600 MW	
SJVN Wind	200 MW	
NTPC Hybrid	450 MW	
Odisha Wind	49.5 MW	
SECI Solar	600 MW + 300 MW BESS	
Solar, Rajasthan	810 MW	
TN BESS	250 MW	
GUVNL Solar	300 MW	
SECI Hybrid	150 MW	
NHPC Solar	600 MW	
Odisha PSP	750 MW	
Solar - mined out area	50 MW	
PSPCL BESS	500 MW	

An Initial Public Offering of NIRL is planned in FY2027 to support the renewable build-out toward 10 GW

[^] The project is in the process of transfer to NIRL

An Integrated Energy Engine

An integrated platform spanning fuel to finished power, with a deepening footprint in renewables and emerging minerals.



Business Segments	Verticals Included	Capacity	Revenue ¹
Mining	Lignite + Coal	50 MTPA (Lignite 30 MTPA + Coal 20 MTPA)	₹8,795 Cr
Thermal Power	Standalone TPS + JVs (NTPL, NUPPL)	5,960 MW (NLCIL 3,640 + JV 2,320)	₹14,443 Cr
Renewable Power	Solar + Wind (Incl. NIRL)	1,734 MW	₹726 Cr

₹1,387 Cr

Equity Capital

72.20%

Gov Holding

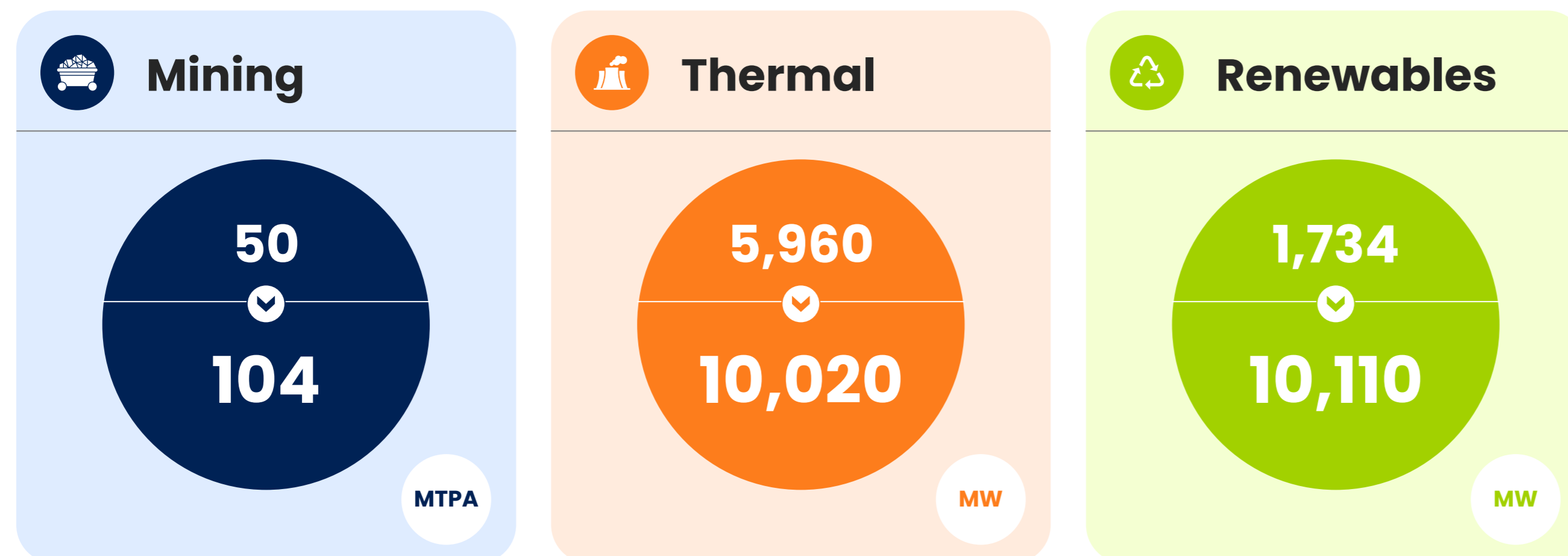
₹21,525 Cr

Net Worth

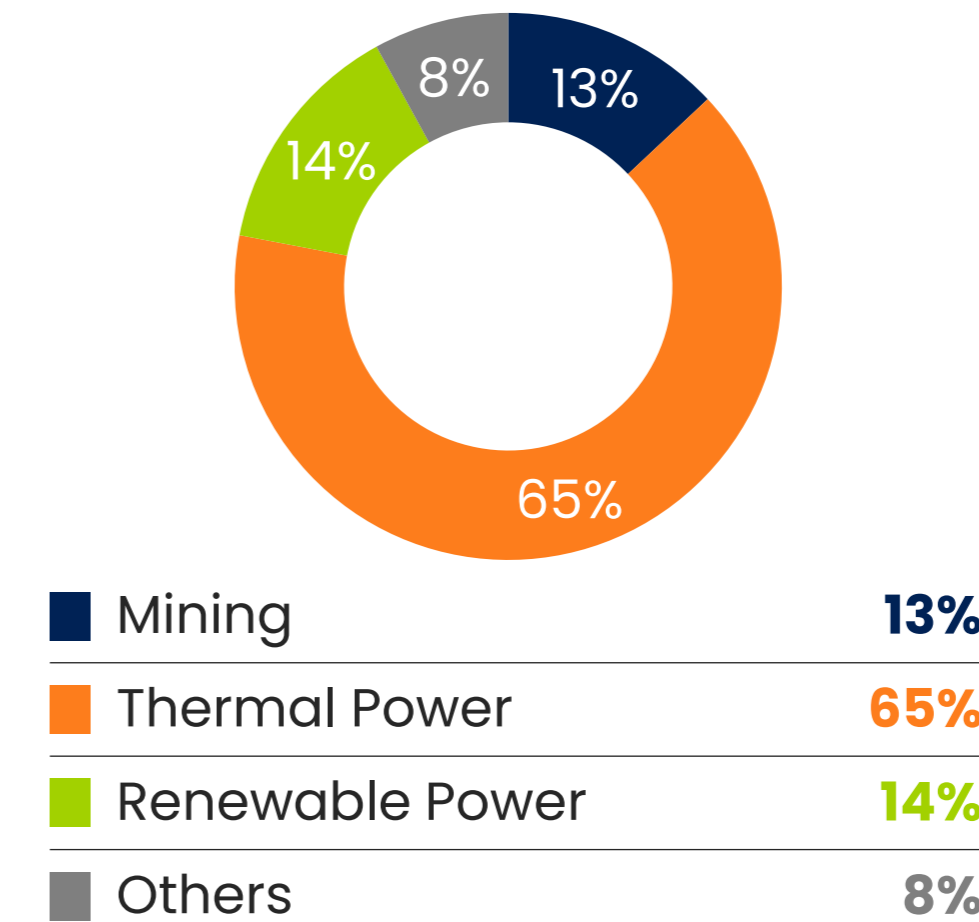
₹65,202 Cr

Total Assets

Capacity Progression in the Next 4 years



Assets Split



¹Including Inter segment Revenue.

The Green Book at a Glance



₹37,898 Cr

Total Capital at Work

Across Solar, Wind and Storage

5,881 MW

Solar + Wind Portfolio

Operational, WIP and Pipeline

3,300 MWh

Energy Storage Pipeline

1,050 MW Across 3 Contracts

1,734 MW




Operational Capacity

Solar, Wind and Rooftop

Capacity in Motion

Segment	Operational		Under Construction		Pipeline		Capital Estimated	
	MW	₹ Cr	MW	₹ Cr	MW	₹ Cr	MW	₹ Cr
Solar	1,683 MW	₹8,885 Cr	1,710 MW	₹9,231 Cr	1,985 MW	₹11,350 Cr	5,480.6 MW	₹29,466 Cr
Wind	51 MW	₹395 Cr	50 MW	₹384 Cr	350 MW	₹3,033 Cr	451 MW	₹3,812 Cr
Total	1,734 MW		1,760 MW		2,335 MW		₹33,278 Cr	

Energy Storage: Contracted Pipeline (₹4,620 Cr)

	<p>PPA signed</p> <p>₹700 Cr 500 MWh</p>		<p>In process</p> <p>~₹1,400 Cr 1,000 MWh</p>		<p>In process</p> <p>~₹2,520 Cr 1,800 MWh</p>
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Note: Project costs are tentative.

Future Ready Diversification



Overburden to Manufactured Sand

- ✦ Mine-I washed silica sand plant (1.0 MTPA) commissioned in February 2026, with commercial sale commenced.
- ✦ TAMIN floated tender on 14.05.2026 for sale of M-Sand from Mine-IA.



Critical Minerals

- ✦ Declared successful bidder for Semhardih & Raipura phosphorite and limestone blocks in Chhattisgarh.
- ✦ Tender floated for engaging an agency to undertake detailed geological exploration.
- ✦ Partnerships with IREL and Bhabha Atomic Research Centre for Rare Earth Elements, including from fly ash.



Battery Energy Storage

- ✦ 250 megawatt / 500 megawatt-hour project in Tamil Nadu.
- ✦ Awarded by Tamil Nadu Green Energy Corporation Limited under the Viability Gap Funding scheme.



Electric Vehicle Charging

- ✦ Five charging stations under installation across our Neyveli operations.



Coal Gasification

- ✦ Revised DFR for the 1200 TPD Lignite-to-Methanol project is under review following significant increase in project cost and adverse IRR projections. EoI for a medium-scale Lignite Gasification to Ammonium Nitrate project is under approval, while preliminary technical studies for Underground Coal Gasification blocks with RIL are in progress.



Green Hydrogen

- ✦ LoA issued, contract agreement signed, and Owners Engineering Consultant (OEC) appointed for the 4 MW Green Hydrogen Project at Neyveli. Kick-off meeting and geotechnical investigations completed; project implementation activities are currently underway.

Tomorrow, in Motion



Each bet sits at a different stage of maturity, charting a path from idea to execution

Stage 1 Conceptualisation	Stage 2 Pre-feasibility	Stage 3 Under Review/Collaboration	Stage 4 Implementation Underway
<p>Green Data Centre: Conceptualising a next-generation, AI-ready facility on the Neyveli ecosystem</p> <p>Location: Neyveli, Tamil Nadu Scale: Phased expansion to 30 MW</p> <p>Design Approach</p> <ul style="list-style-type: none"> ★ AI-ready, high-density computing ★ Liquid immersion and direct-to-chip cooling using mine-sump water ★ Integrated renewable energy and reliable power infrastructure envisaged <p>Intended Users: Hyperscale's, research institutions, startups and emerging AI applications</p> <p>Current Stage: Technical assessments, stakeholder consultations and implementation planning under progress</p>	<p>Rare Earth Extraction: Landmark BARC pilot to extract Rare Earth Elements from fly ash</p> <p>Pilot Partnership: Memorandum of Understanding signed with the Bhabha Atomic Research Centre</p> <p>Sampling and Analysis Programme: As part of the initiative, lignite, Overburden and Fly Ash samples were collected from Mine-I, Mine-IA, Mine-II, Barsingsar and Thermal Power Stations, and sent to the GSI Laboratory in, Hyderabad for detailed REE and trace-element analysis</p> <p>Continuing Programme: We continue our regular overburden sampling in accordance to the Ministry of Coal Office Memorandum dated 18 November 2025</p>	<p>2 tracks under our Gasification project are at different stages of maturity</p> <p>Surface Gasification: Lignite to Methanol</p> <p>Scale: 1200 TPD of Methanol Feed Rate: 2.2 MTPA of Lignite Current stage: With the DFR being reviewed, an EOI in under approval for a medium scale Lignite to Ammonium Nitrate project of 100 TPD at Neyveli</p> <p>Underground Coal Gasification: Ministry of Coal has reserved two lignite blocks, Dipside Tadkeshwar and Dungra, and Dipside Valia and Rajpadi in Gujarat for NLC India Limited</p> <p>Current Stage: MoU signed with Reliance Industries Limited for collaboration on Underground Coal Gasification</p>	<p>Green Hydrogen: Setting up a Green Hydrogen Project with an input of 4 MW Solar</p> <p>Location: Neyveli, Tamil Nadu</p> <ul style="list-style-type: none"> ★ Technology: PEM electrolyser ★ Capacity: 300 kg H₂/day (99,000 kg/annum) ★ Purity: 99.999% ★ Operation: Sunshine hours only ★ Footprint: 1 acre ★ Plant life: 25 years ★ Timeline: 18 months <p>Execution Partners:</p> <ul style="list-style-type: none"> ★ Project execution: M/s. InSolare Energy Limited ★ Owner's Engineering Consultant: M/s. Bureau Veritas (India) Pvt. Ltd. <p>Current Stage: Following the completion of Geo-technical investigation, the project is currently underway</p>

Research that Builds the Next Decade



R&D is positioned at the intersection of our strengths and India's emerging energy frontiers, anchored by the Centre for Applied Research and Development (CARD)

CARD Recognitions in FY26

- ★ NABL Accreditation received in December 2025 in the field of Testing under ISO/IEC 17025:2017
- ★ Recognition as an in-house R&D unit received from the Department of Scientific and Industrial Research (DSIR), Ministry of Science & Technology, in January 2026

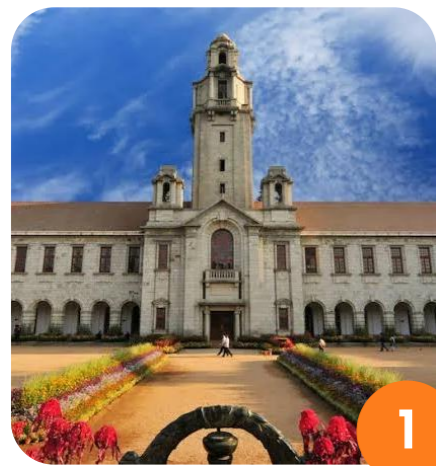
Active Pilots

- ★ 4 MW PEM electrolyser-based Green – Under Implementation
- ★ Hydrogen plant Initiated lignite and humic acid characterisation for semiconductor applications
- ★ Set up a lab-scale Carbon Capture system to advance decarbonisation R&D
- ★ Signed an MoU with BARC to pilot extraction of Rare Earth Elements from fly ash Progressing work on alternate uses of lignite beyond conventional power generation
- ★ Advancing biomass pellet co-firing with coal and lignite, in line with MoP directives

13 R&D Projects with Premier Institutes

- ★ IISc & NITT – Alternative materials for tungsten carbide excavator teeth
- ★ CSIR-IMMT & IITH – High-purity silica for solar; AI-drone boiler inspection
- ★ Annamalai University & TNAU – Fly ash-derived metal-supported SOFC; agrivoltaic microbial solutions
- ★ NITR & IIITDM – UV ceramic membrane filters; AI-enabled lignite dust collection
- ★ Annamalai University, TNAU & Alagappa University – AI conveyor monitoring; lignite humic acid for aquaculture and TN crops; bio-hydrogen from biomass

Research that Builds the Next Decade



IISc Bangalore

Alternative materials to tungsten carbide inserts in bucket wheel excavators

1

Mining Equipment Longevity

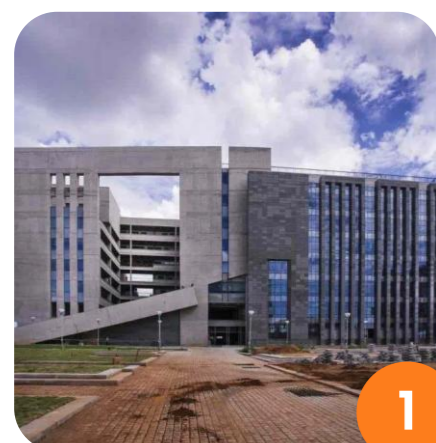


CSIR-IMMT, Bhubaneswar

Beneficiation studies for high-purity silica from lignite-associated sand

1

Critical Minerals / Solar Feedstock



IIT Hyderabad

Drone-based AI/ML boiler inspection with LiDAR navigation

1

AI / Asset Inspection

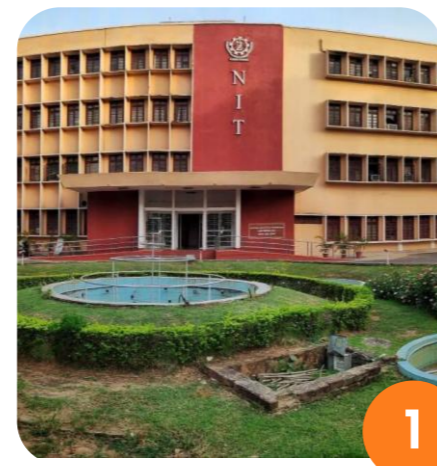


IIITDM Kancheepuram

AI-enabled autonomous lignite dust collection system

1

AI / Environmental Control



NIT Rourkela

UV-assisted self-cleaning ceramic membrane filters for water treatment

1

Water / Membranes



NIT Tiruchirappalli

New material for bucket wheel teeth and life improvement

1

Mining Equipment Longevity



Alagappa University

Production of biohydrogen using biomass

1

Green Hydrogen



Tamil Nadu Agricultural University

Crop cultivation under shade - agri-voltaic system

2

Agri-voltaics



Annamalai University

Metal-supported SOFCs from lignite fly ash

Fuel cells / Fly Ash Valorisation

Lignite humic acid for brackish water aquaculture

Lignite by-product Utilisation

Renewable hydrogen from biogas via parabolic solar heating

Green Hydrogen

Automated conveyor belt monitoring and defect detection

AI / Mining Reliability

X No. of Projects

04 | Financial Overview



Financial Performance: NLC Group in FY2026



₹18,467 Cr

Total Income

₹15,501 Cr

Total Expense

₹3,769 Cr

Profit After Tax

₹17,490 Cr⁵

Total Segment

₹8,795 Cr

Mining Revenue

₹14,443 Cr

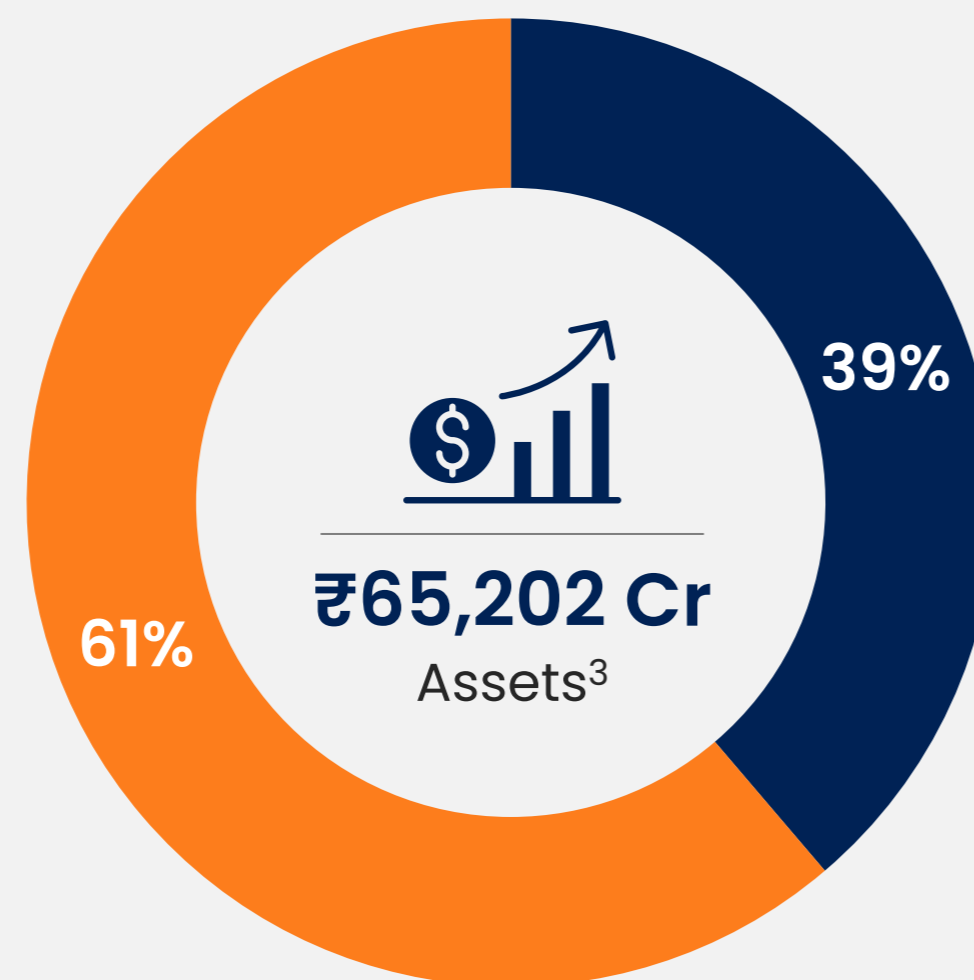
Thermal Revenue

₹726 Cr

Renewables Revenue

Balance Sheet

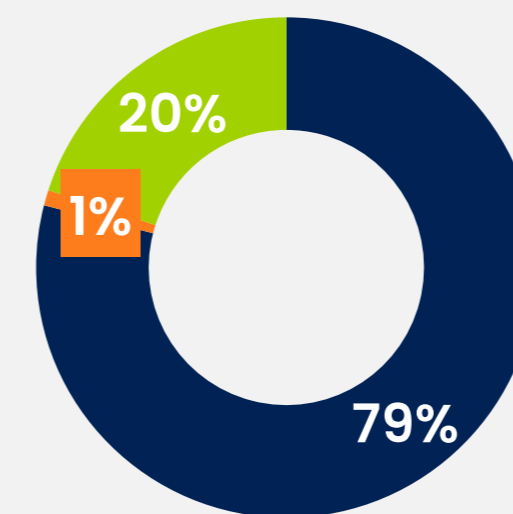
Assets, Liabilities, and Shareholder's Equity for FY2026



Deployment

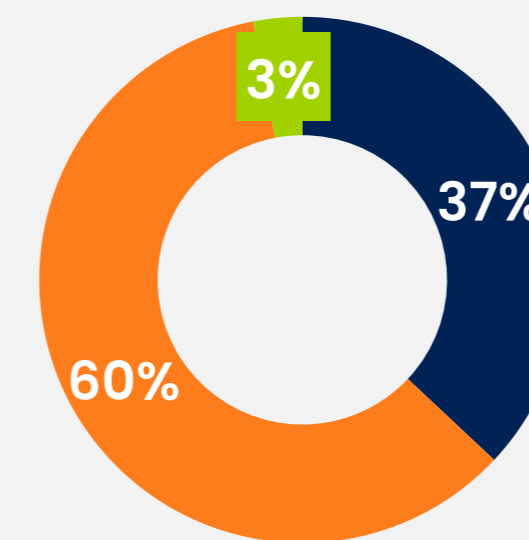
Equity and Reserves ⁴	₹25,274 Cr
Liabilities	₹39,928 Cr

Overview of Financials



■ Expense¹ ■ Tax ■ PAT

Segment Revenue²



■ Mines ■ Thermal ■ Renewables

Debt-to-Equity Ratio Trend



Key Ratios:

22.39%

Operating Margin

20.49%

Net Profit Margin

4.64

Debtor Turnover Ratio

¹Including Regulatory; ²Including Inter Segment Revenue; ³Including Regulatory Assets; ⁴Includes Non Controlling Interest; ⁵Excluding Inter Segment Revenue of ₹ 6,475 Cr.

Financial Performance: Robust Consolidated Financials



₹17,490 Cr

₹15,283 Cr (FY25)

Total Revenue

₹7,475 Cr

₹6,513 Cr (FY25)

EBITDA

43%

43% (FY25)

EBITDA Margin

₹3,769 Cr

₹2,714 Cr (FY25)

PAT

₹25.4

₹18.90 (FY25)

EPS

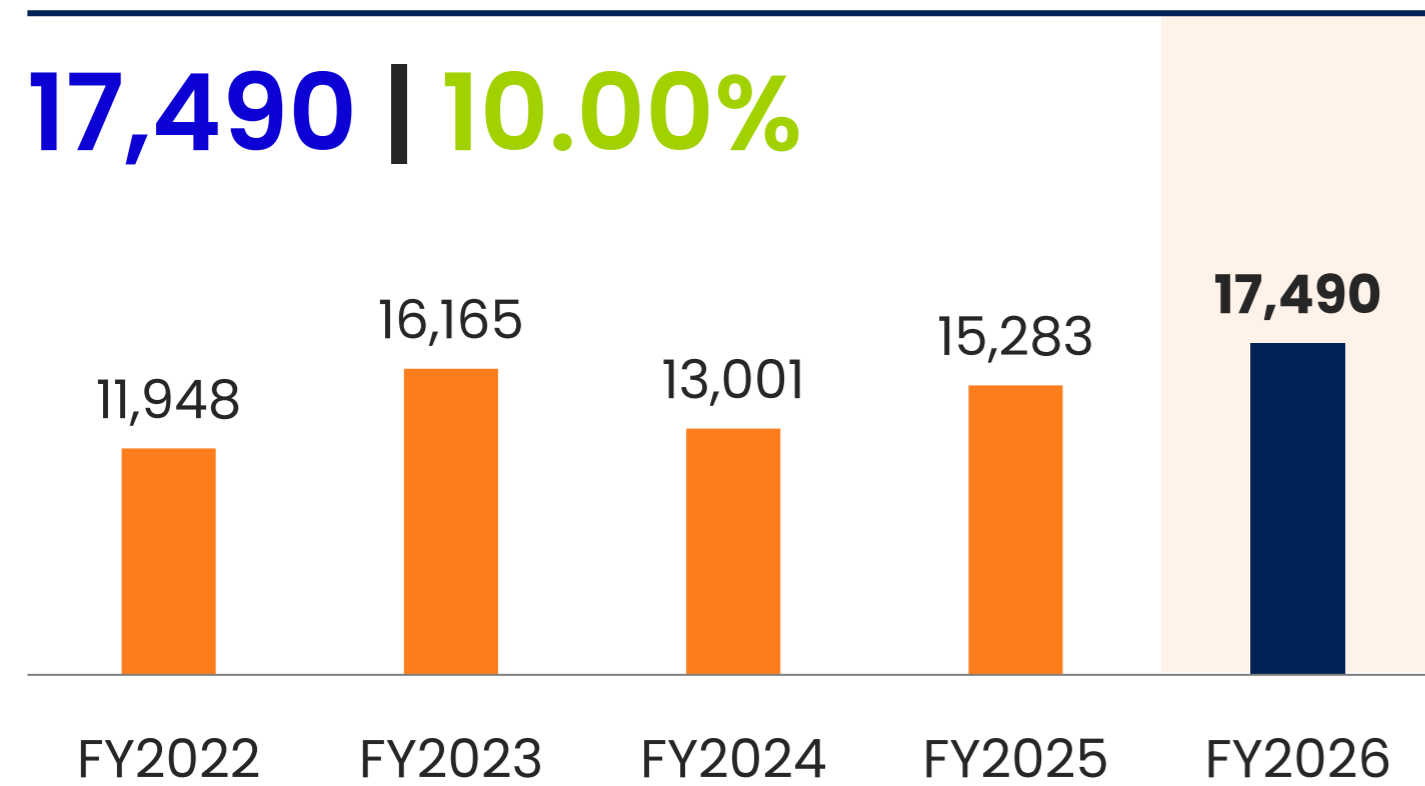
QoQ Change	Q4 FY2025	Q4 FY2026	Particulars (₹ in Cr)	FY2026	FY2025	YoY Change
31%	3,836	5,042	Revenue from Operations	17,490	15,283	14%
14%	136	155	Other Income	977	1,606	(39%)
31%	3,972	5,197	Total Income	18,467	16,889	9%
10%	2,975	3,268	Expenditure	11,901	10,443	14%
20%	581	695	Depreciation & Amortization	2,379	1,884	26%
12%	325	364	Finance Cost	1,222	932	31%
(21%)	821	648	Net Regulatory Movement Income/(Expense)	909	66	1,273%
66%	912	1,518	Profit Before Tax (PBT)	3,875	3,697	5%
216%	468	1,481	Profit After Tax (PAT)	3,769	2,714	39%

Consolidated Financial Performance: Consistently Improving over the Years



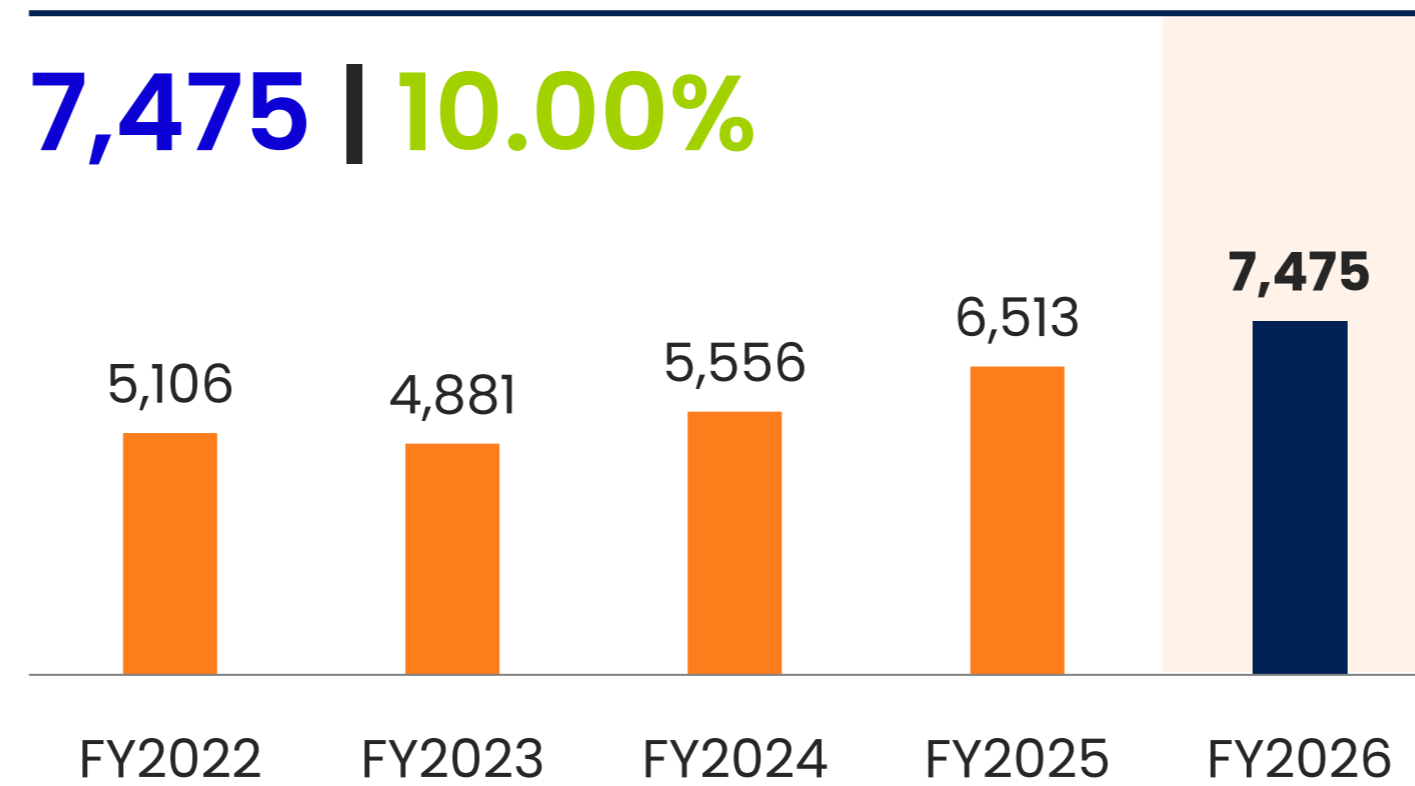
Revenue (₹ in Cr)

17,490 | 10.00%



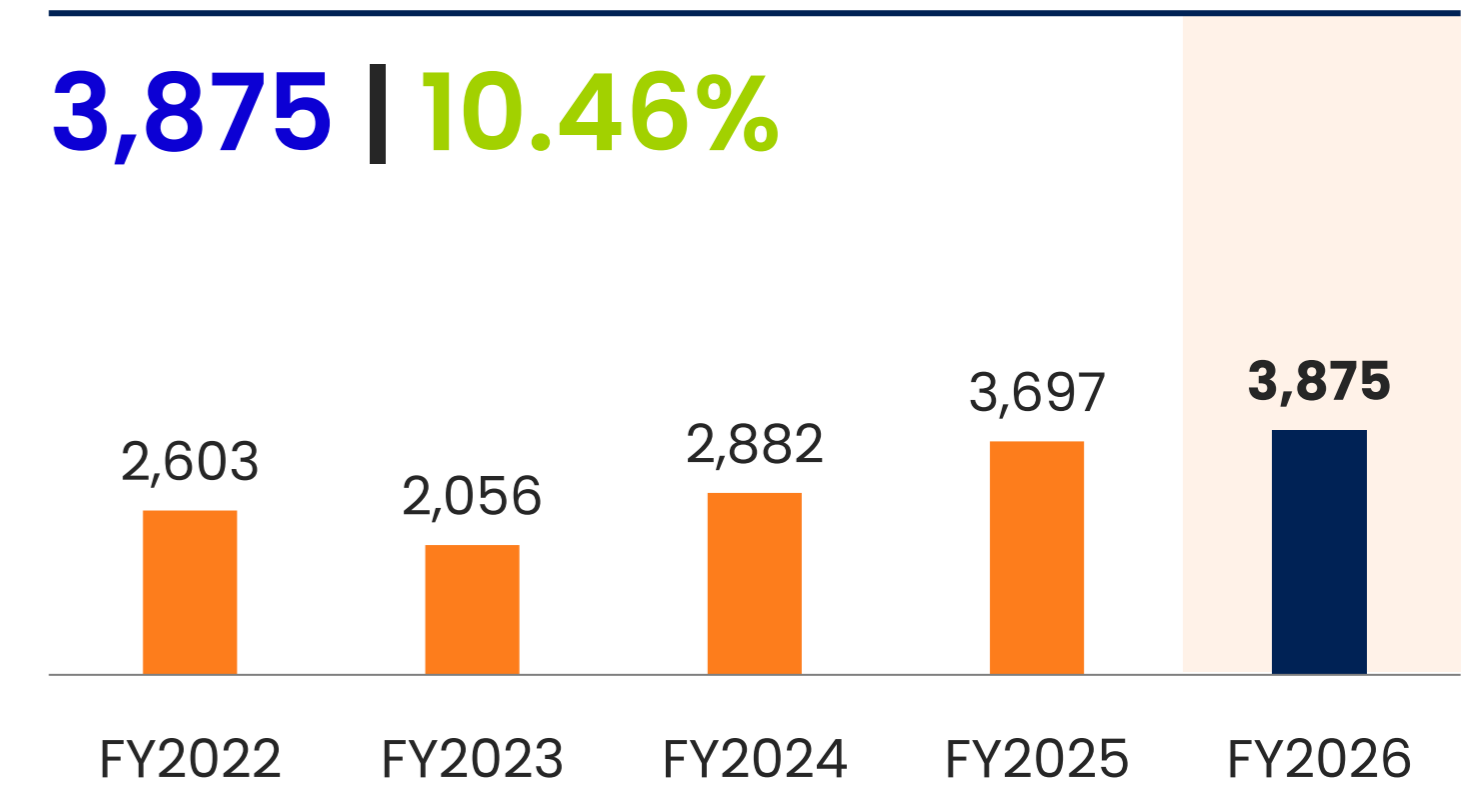
EBITDA (₹ in Cr)

7,475 | 10.00%



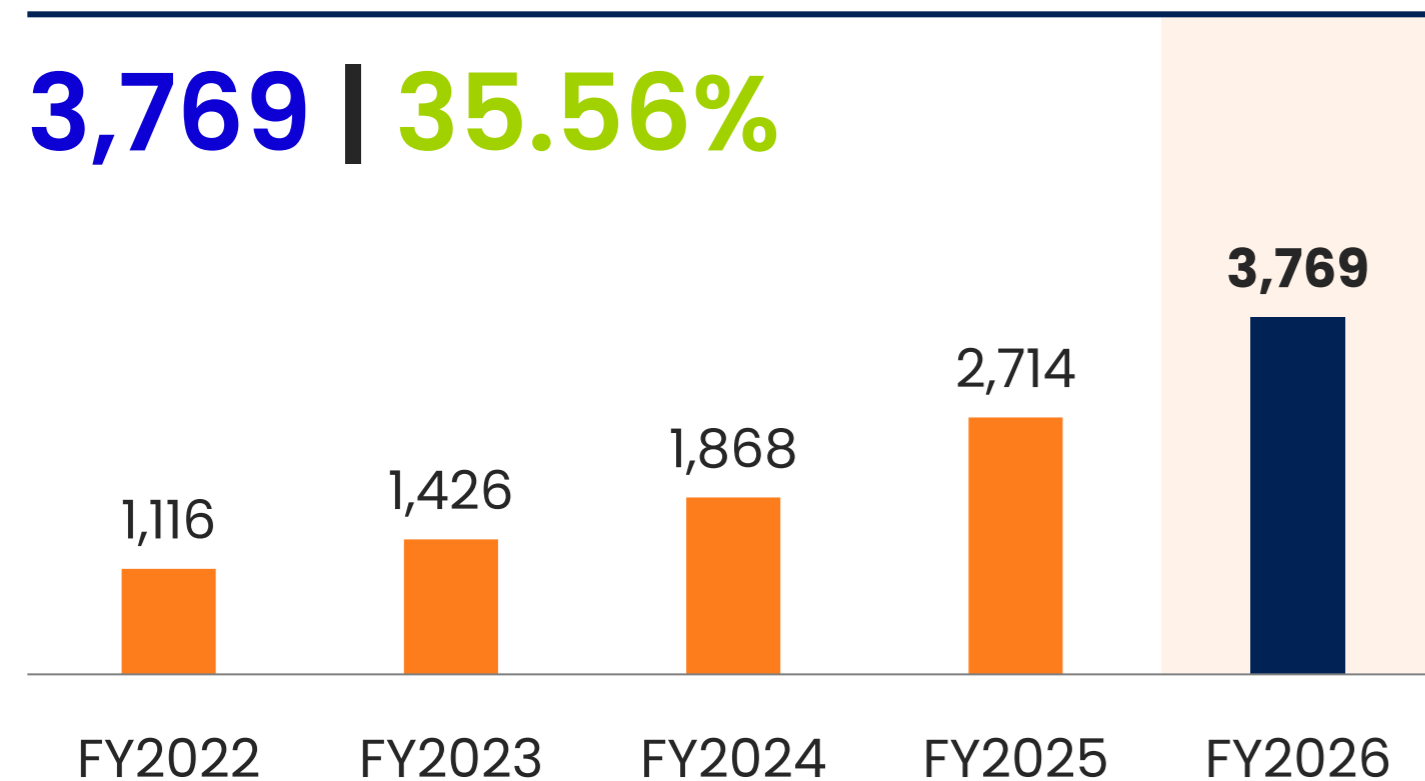
PBT (₹ in Cr)

3,875 | 10.46%



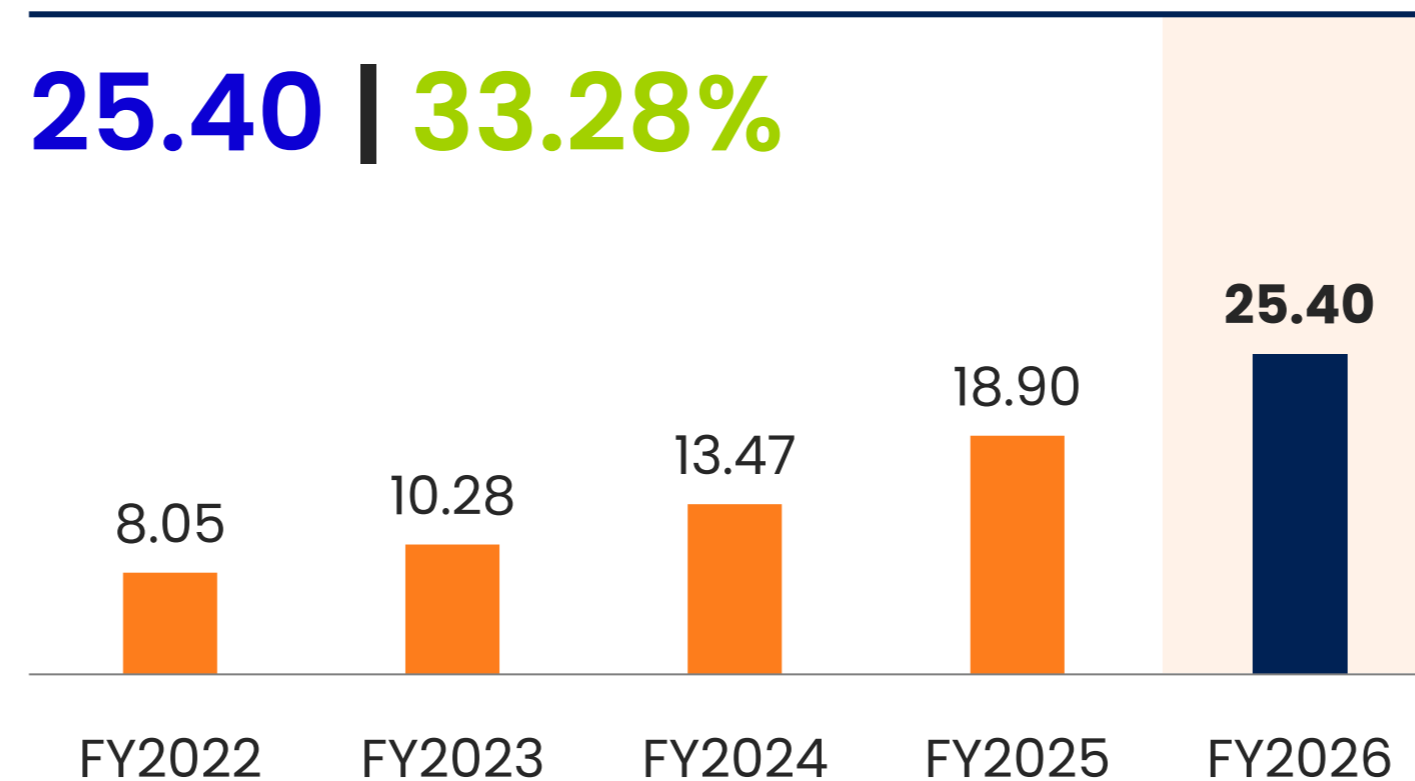
PAT (₹ in Cr)

3,769 | 35.56%



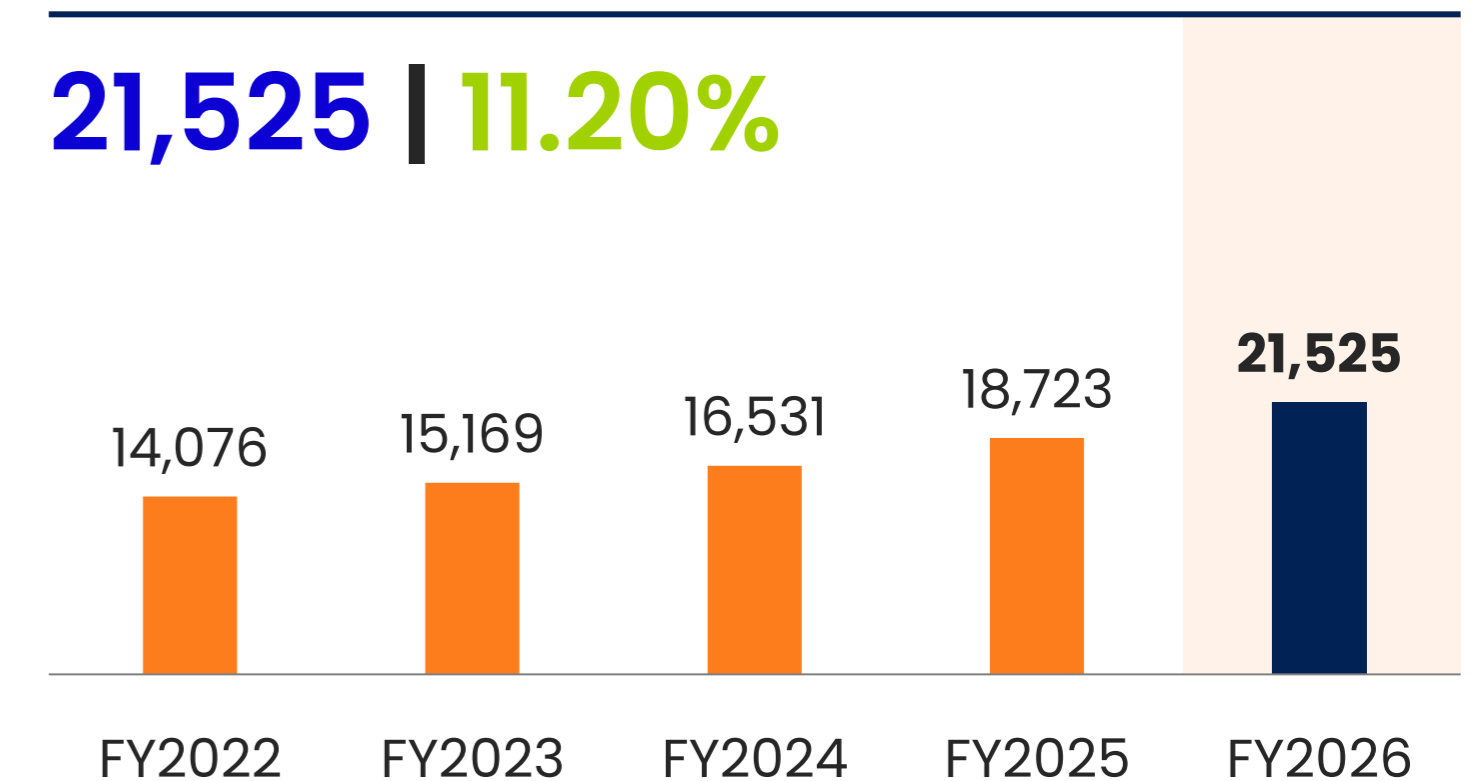
EPS (₹)

25.40 | 33.28%



Net Worth (₹ in Cr)

21,525 | 11.20%

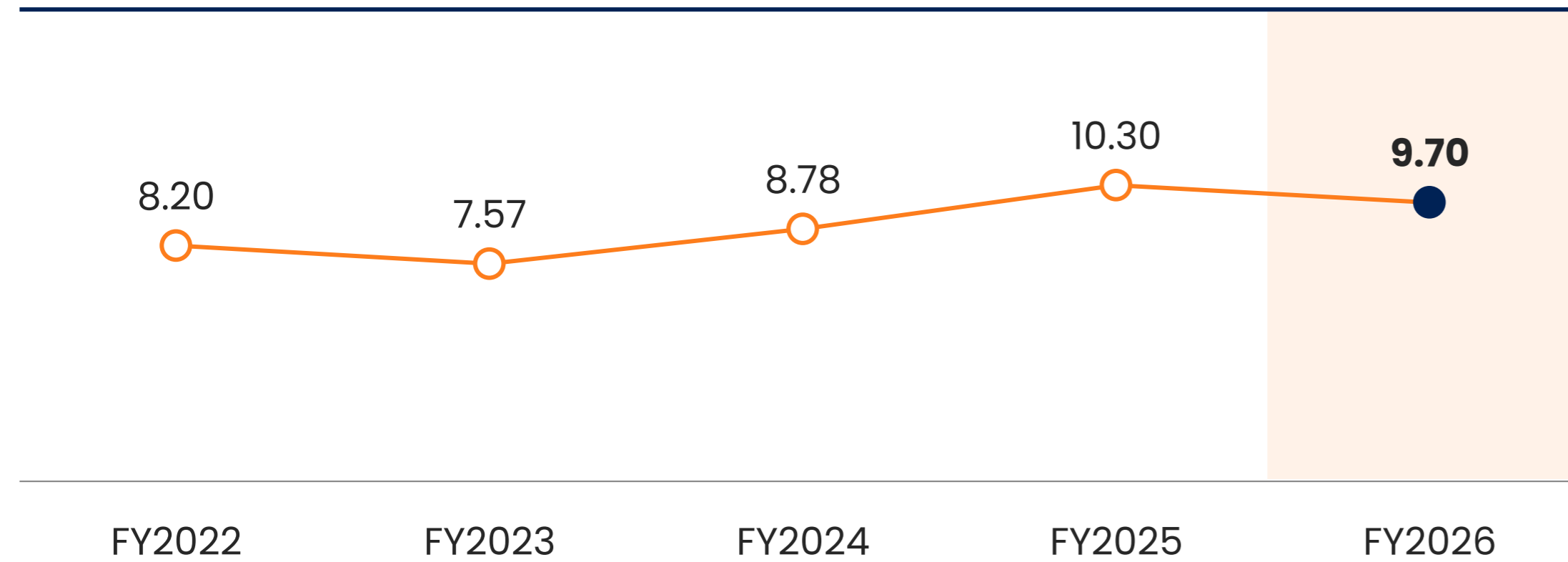


XX% CAGR

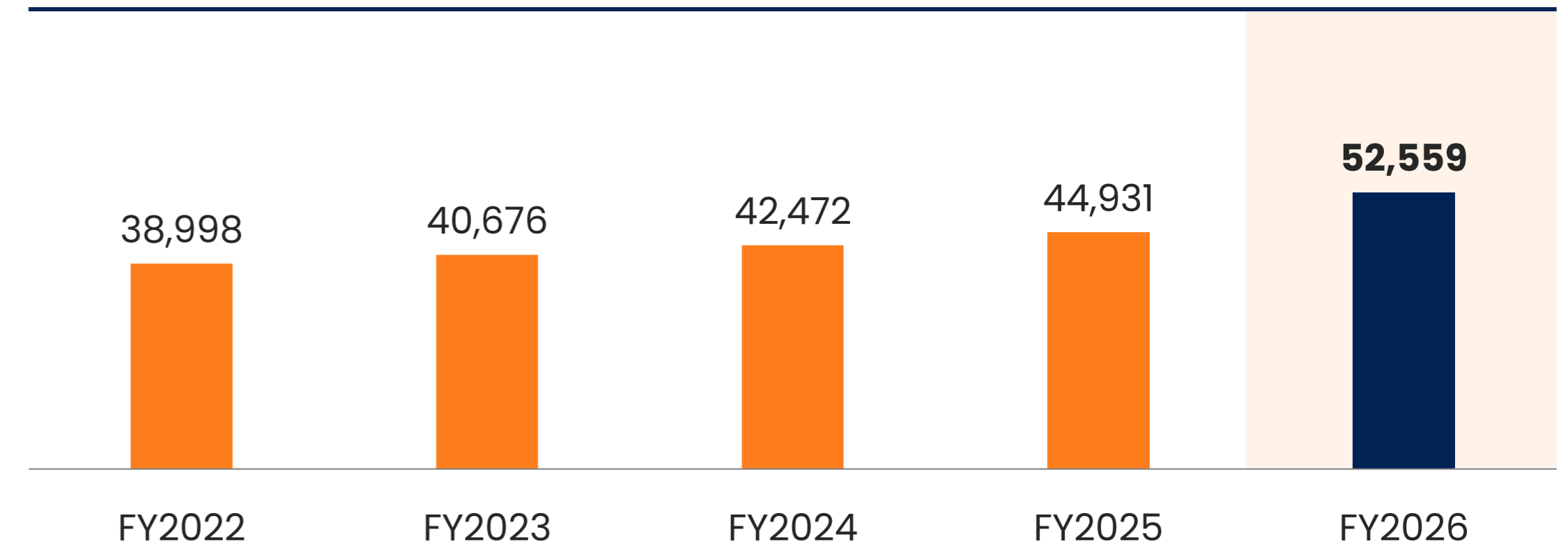
Consolidated Financial Performance: Last 4 Years and FY2026



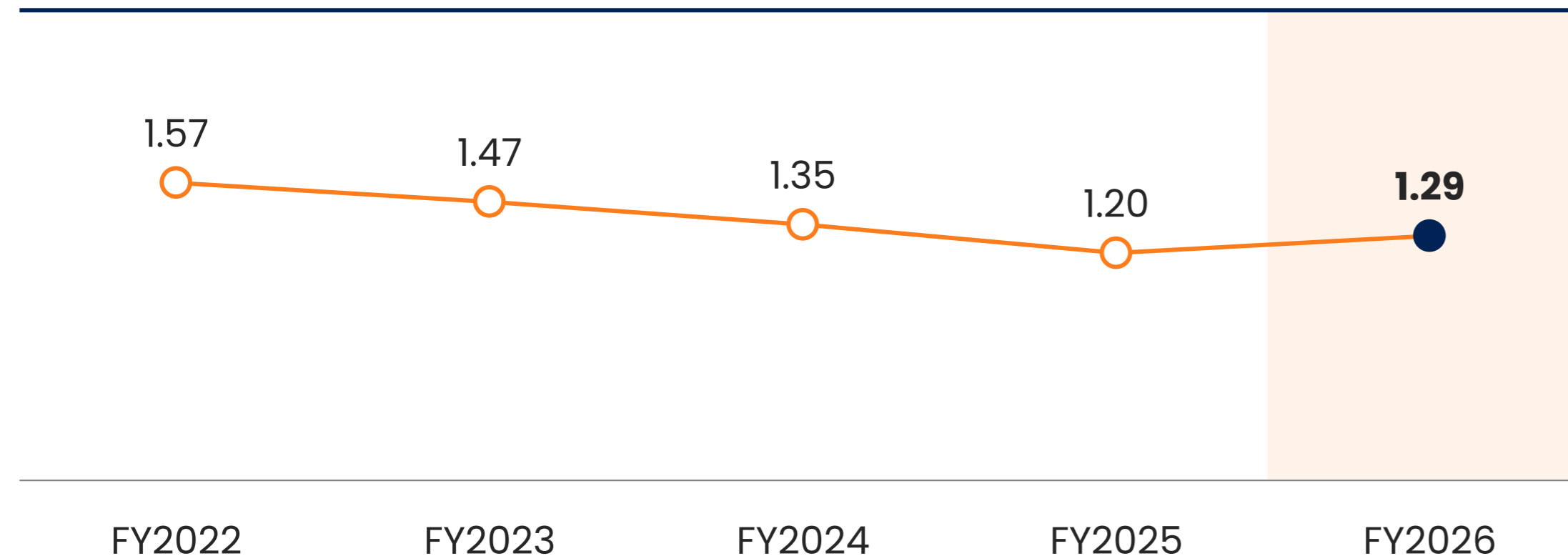
ROCE (%)



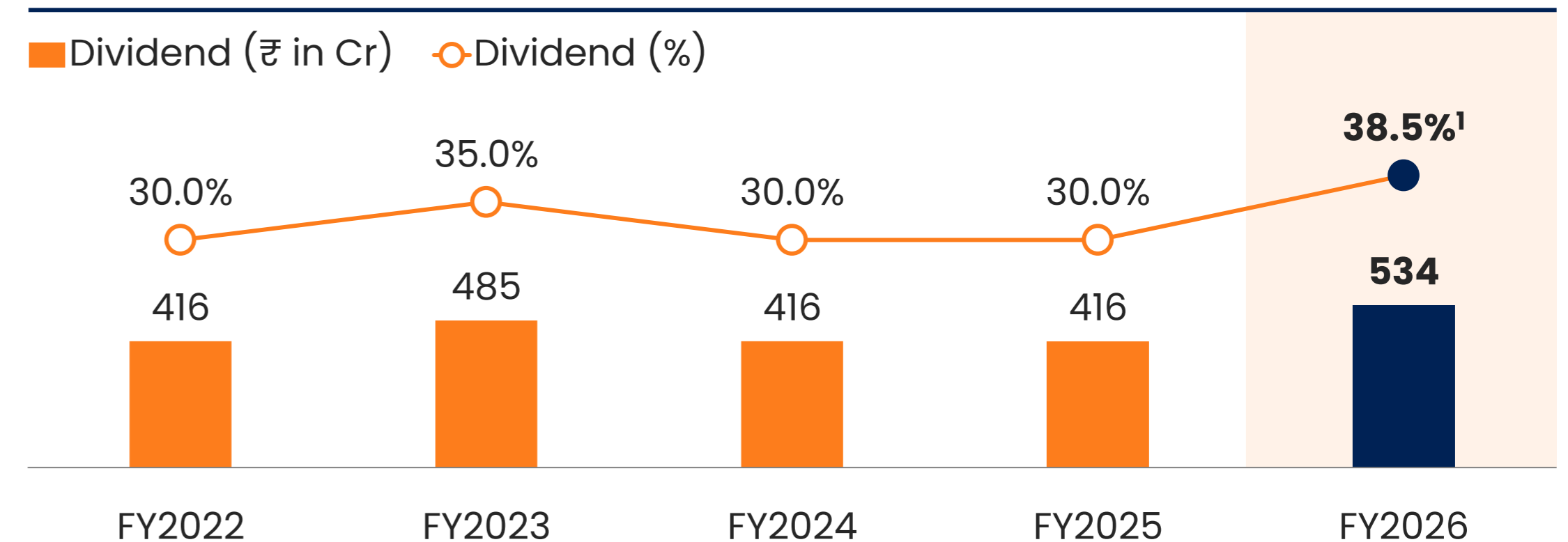
Capital Employed (₹ in Cr)



Debt Equity Ratio (x)



Dividend Trend¹

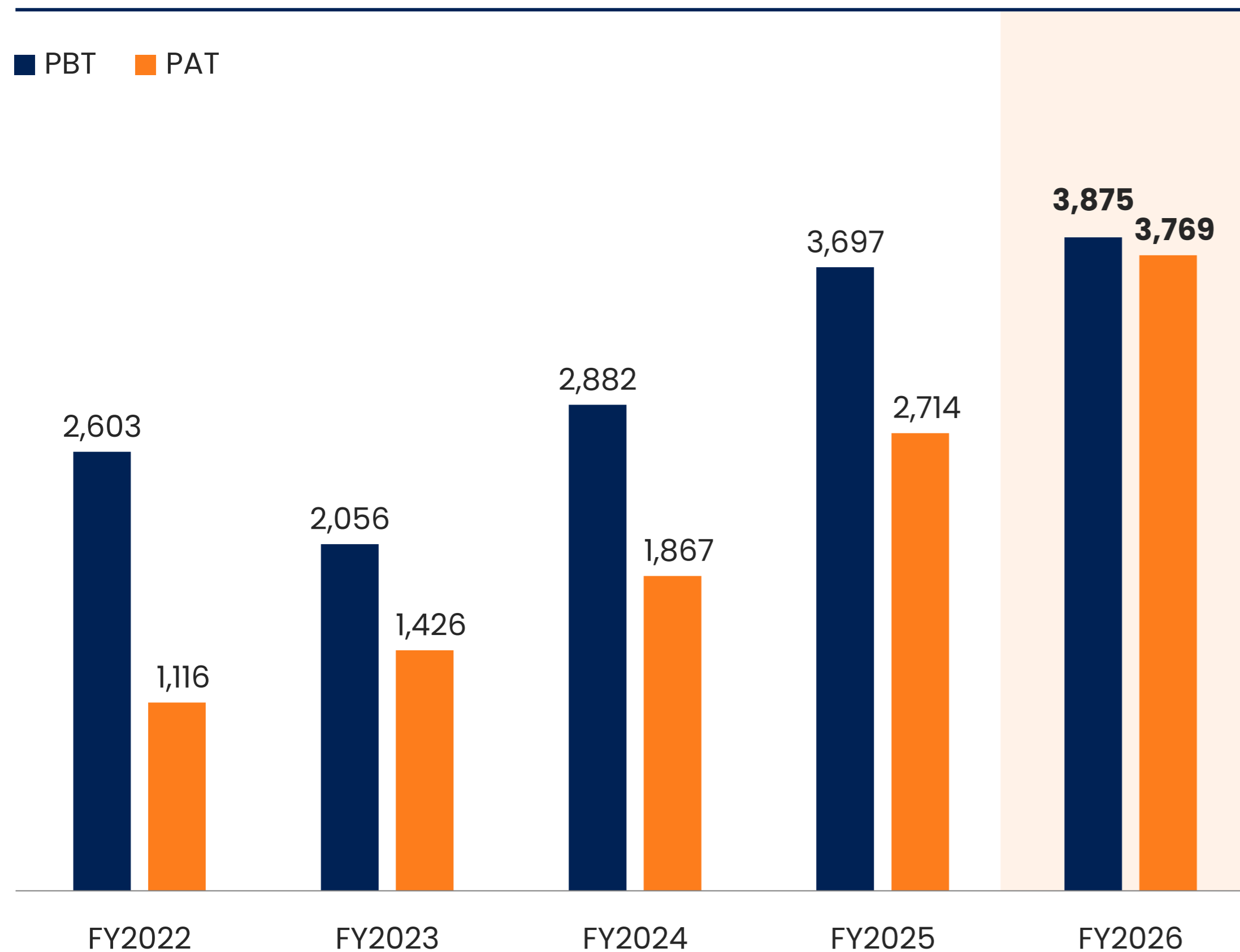


Note: Capital employed is tangible net worth plus outstanding borrowings and DTL less Intangible Assets; ¹ Dividend 2.5% recommended for shareholders' approval.

Consolidated Financial Performance: Last 4 Years and FY2026



PBT¹ & PAT (₹ in Cr)



Key Financial Ratios

	FY2022	FY2023	FY2024	FY2025	FY2026
OPM² (%)	21.14	13.31	19.78	19.69	22.39
NPM (%)	9.08	10.2	13.27	17.68	20.49
ROCE (%)	8.2	7.57	8.78	10.3	9.70
RONW (%)	7.93	9.4	11.3	14.49	17.51
Current Ratio	1.28	1.38	1.17	0.78	0.80
Quick Ratio	1.07	1.2	0.98	0.60	0.58

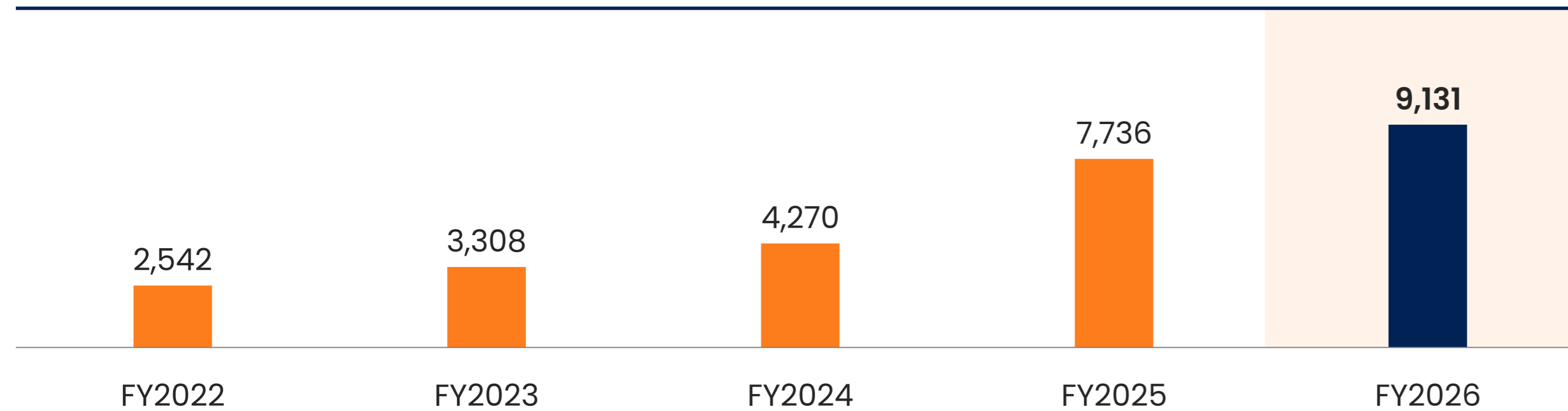
¹PBT considering Net Movement in Regulatory Deferral Income/ Expenses. ROCE is EBIT without Exceptional/ Capital Employed;

²OPM computed considering Net Movement in Regulatory Expenses/ Income and without considering Exceptional Item and Other Income.

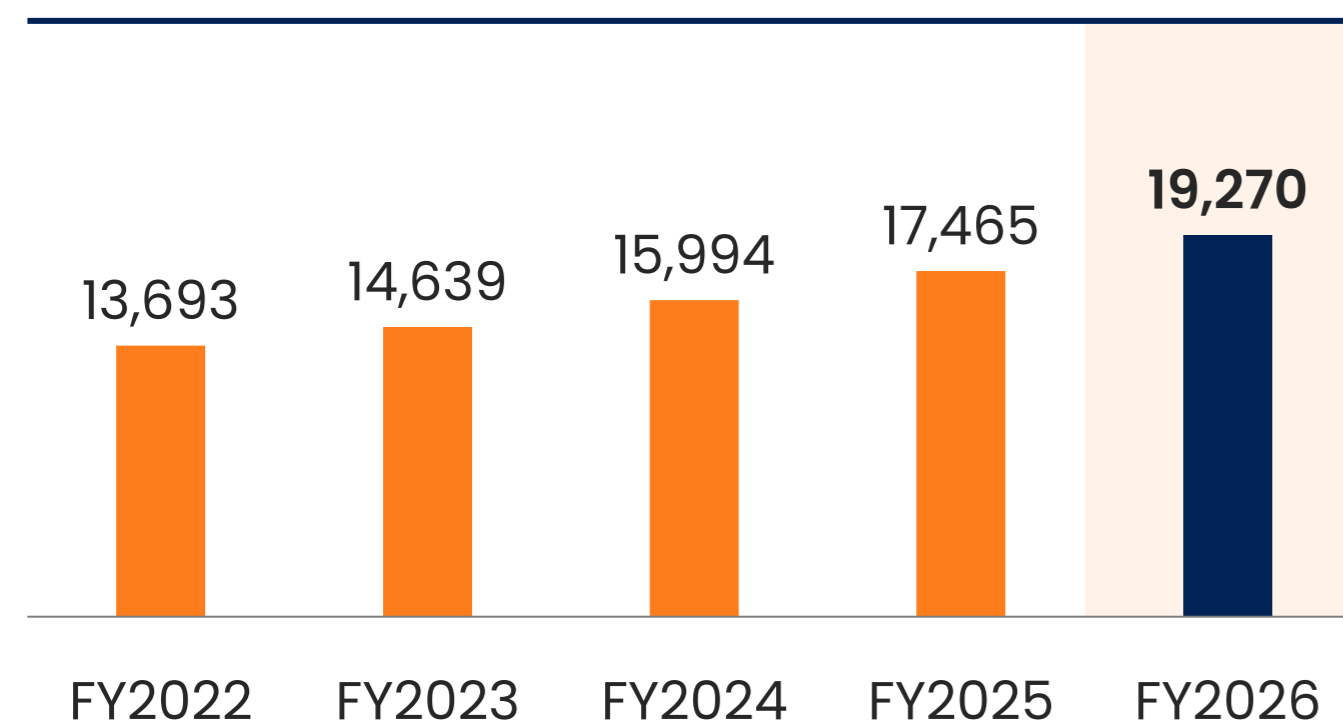
Financial Performance: Consistent Growth over the Years



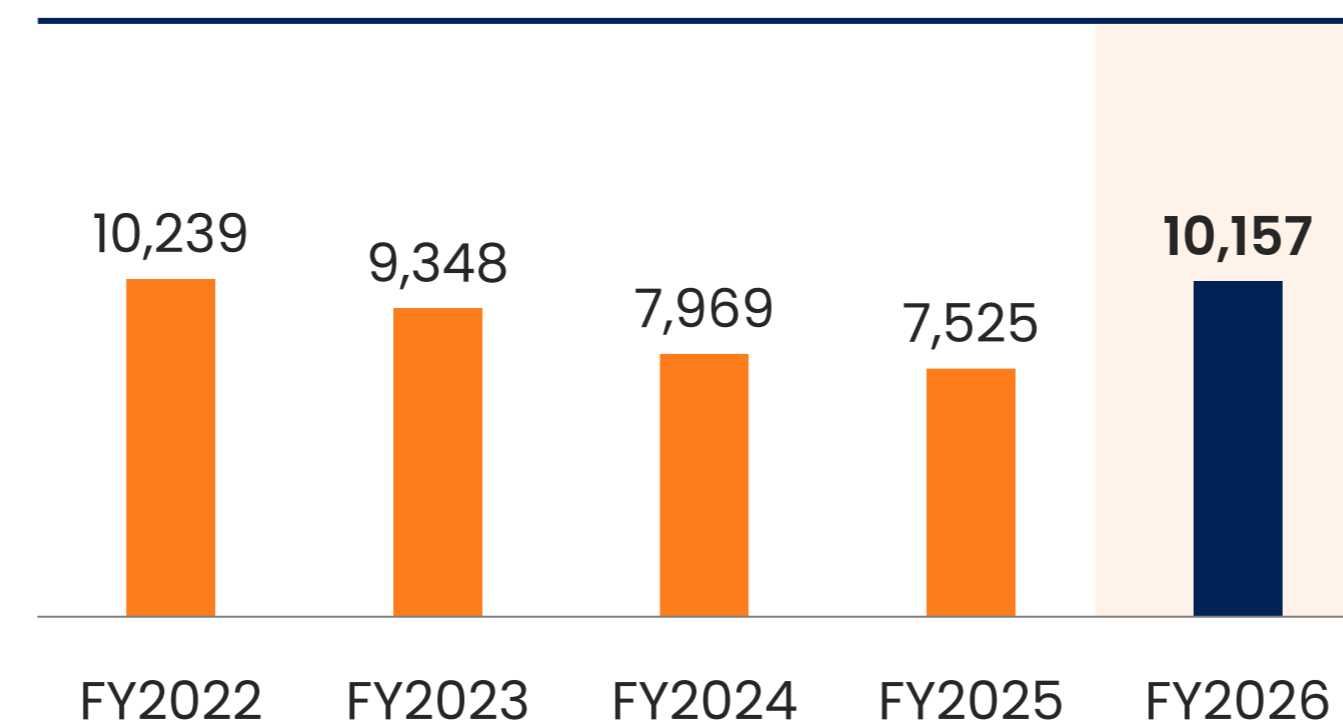
Consolidated Capex (₹ in Cr)



Net Worth¹ (₹ in Cr)



Loans Outstanding¹ (₹ in Cr)



Credit Rating

	2026		2025
ICRA A MOODY'S INVESTORS SERVICE COMPANY	AAA (Stable)	=	AAA (Stable)
Crisil a company of S&P Global	AAA/ Stable	=	AAA/ Stable
CareEdge RATINGS	AAA; Stable	=	AAA; Stable
India Ratings & Research A Fitch Group Company	AAA/ Stable	=	AAA/ Stable
Infometrics Ratings	AAA/ Stable	=	AAA/ Stable
Acuite RATINGS & RESEARCH	AAA/ Stable	=	AAA/ Stable

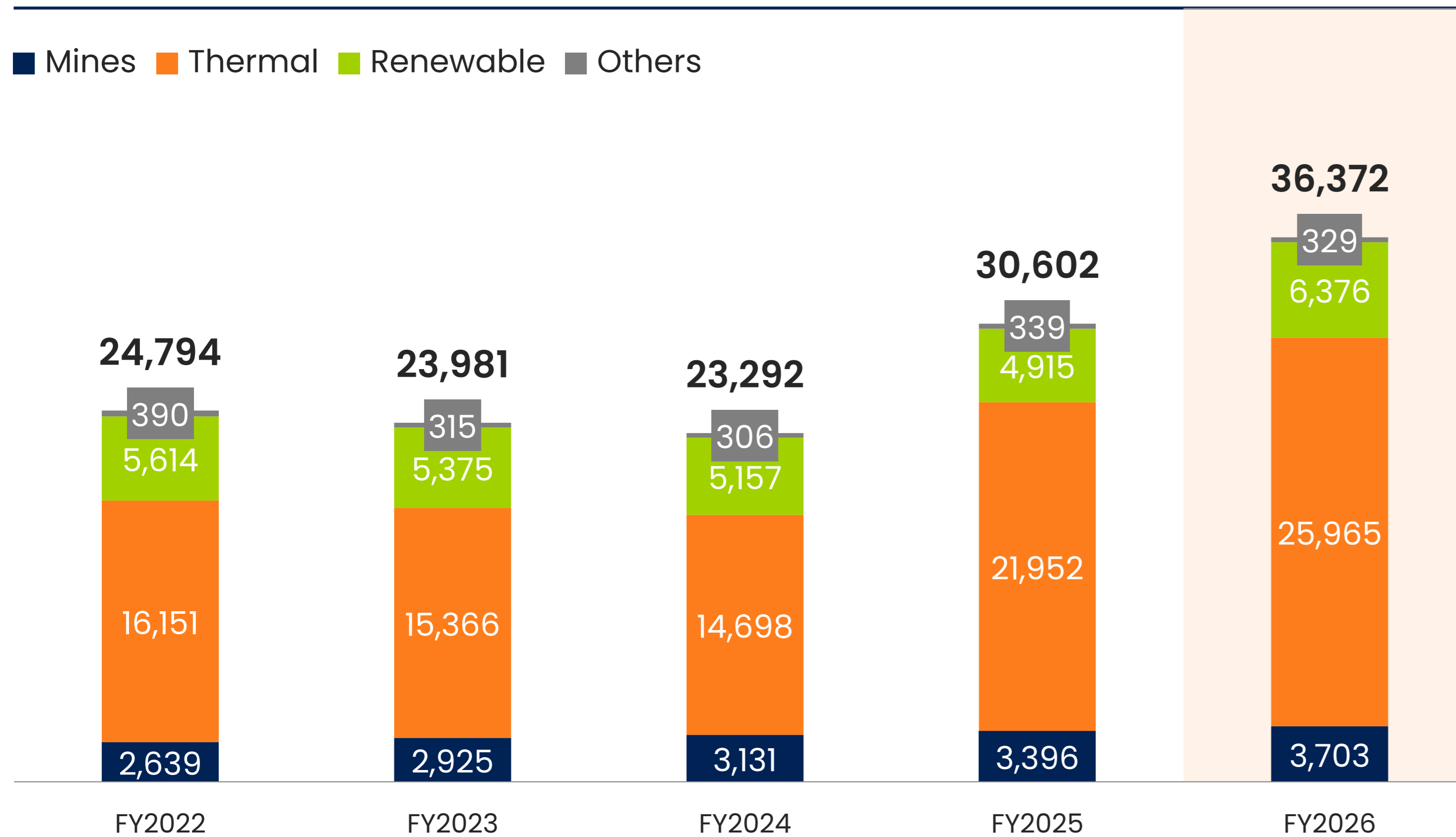
¹ Standalone Basis.

Consolidated Segment Investments and Green Portfolio

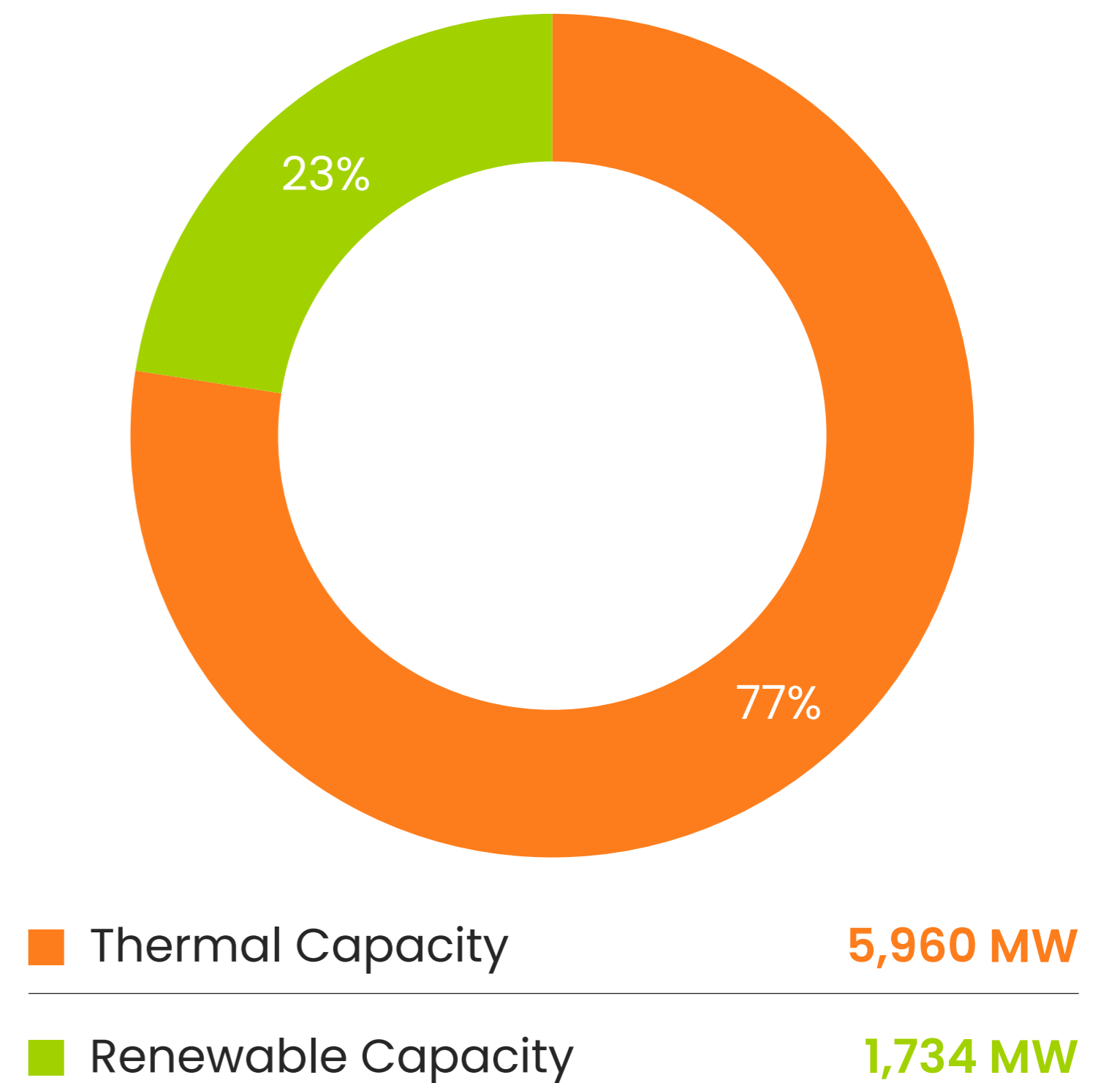


Net Book Value of Assets (₹ in Cr)

■ Mines ■ Thermal ■ Renewable ■ Others



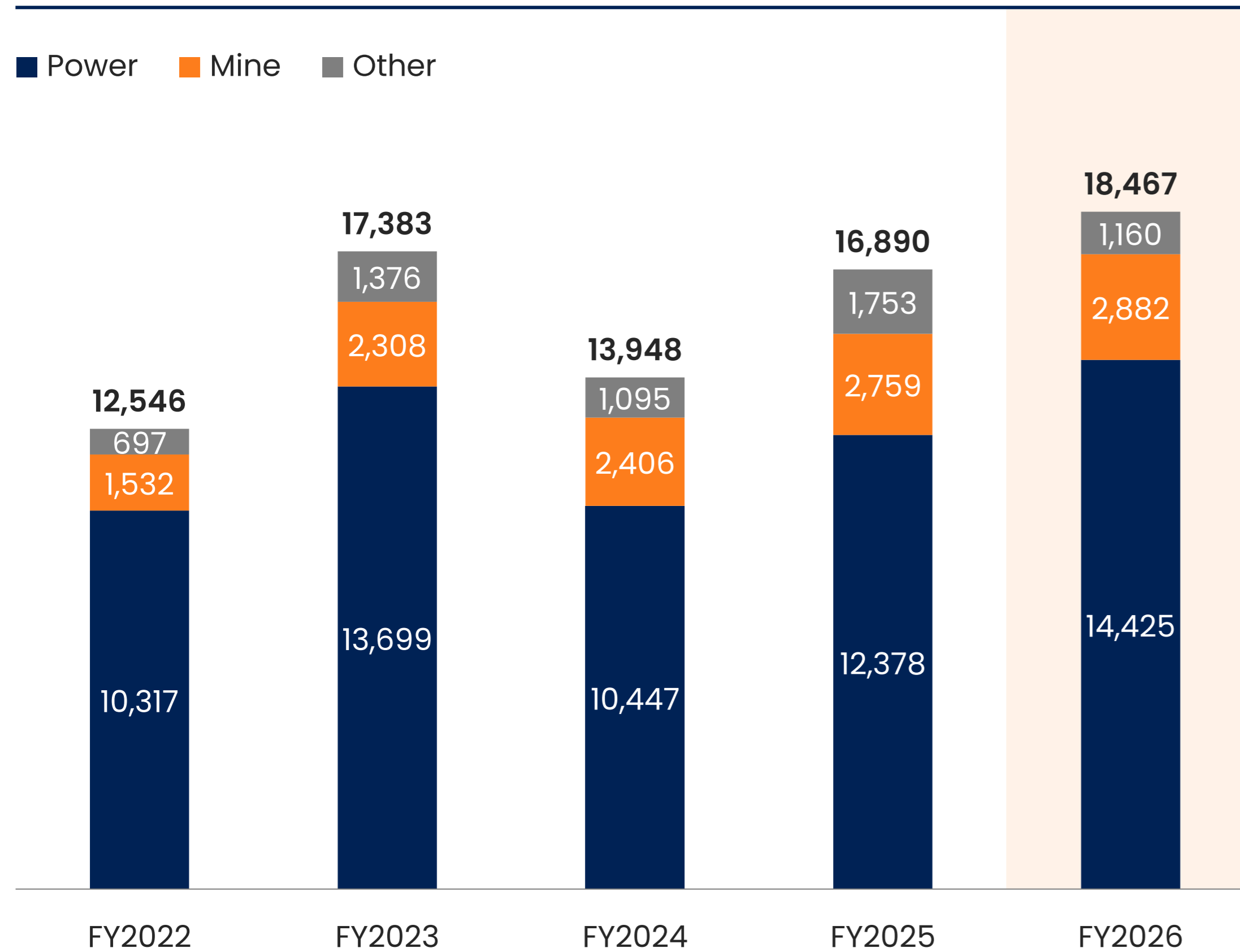
Installed Generation Capacity



Consolidated Financial Performance: Over the Last 4 Years



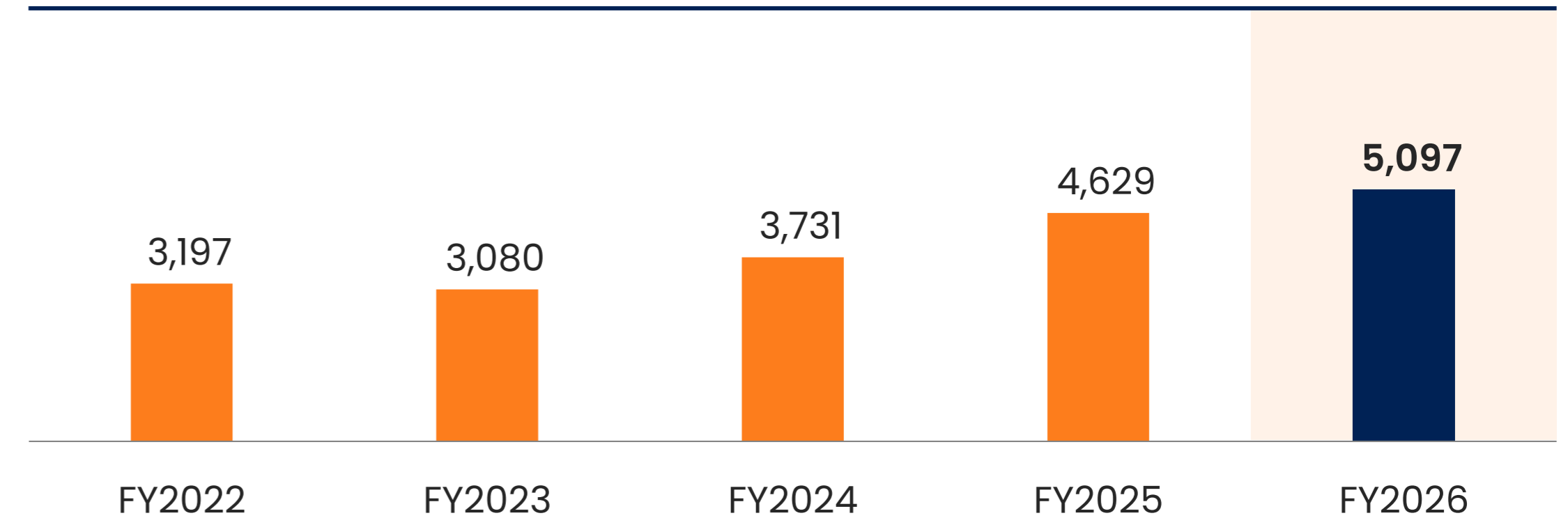
Total Income (₹ in Cr)



EBITDA (₹ in Cr)



EBIT (₹ in Cr)



05 | Industry Overview



India's Power Reliability & Mining Landscape



India's power and mining sectors both posted record numbers in FY26. Conventional capacity kept supply reliable through peak demand; renewables booked their largest-ever annual addition. We sit on both sides of this story.

270.82 GW

Peak power demand met (May 2026)

55.29 GW

Highest ever non-fossil capacity added

210.46 MT


Captive & commercial coal output

65GW

Total power capacity added

How The Year Unfolded: Two Sides, One Grid

Power Sector: Reliable Supply at Record Scale

 **Per-capita Electricity:** ^{^ 52.6%} **957 KWh** FY2014 → **1,460 KWh** FY2026

 **Rural Power Availability:** **12.5 hr/day** FY2014 → **22.6 hr/day** FY2026

 **Thermal Under Construction:** **40.35 GW** Being built + **24.02 GW** Plan/bid

Mining Sector: Self-Reliance Deepens

 **New Coal Blocks Operationalised:** **12 blocks** Added in FY26, **86 MT** Annual Capacity

 **Domestic Share of Coal Demand:** **77%** FY2021 → **83%** FY2026

 **FY30 Target Coal Production:** **1.05 BT** FY2026 → **1.5 BT** FY2030

What this means for us:

As an integrated mining-and-power platform, we sit on both sides of this record year: our captive lignite mines back up our thermal stations, and a reliable demand-led power system gives us assured offtake.

India's Dual Energy Mandate to 2030



India is running two tracks at the same time: racing toward 500 GW of non-fossil capacity while continuing to award and build conventional capacity to meet near-term base-load demand. We operate at the intersection of both

500 GW

Non-fossil capacity by 2030

50%

of energy from renewables by 2030

-1 Bn ton

Projected CO₂ emissions cut by 2030

Net-Zero

by 2070

Track 1 Vs Track 2: Where India Stands

TRACK 1: Non-Fossil Race to 500 GW

Accelerating, ahead of schedule

- ✦ **Solar capacity (Mar 2026):** 150.26 GW installed; 45 GW added in FY26 (highest ever annual addition)
- ✦ **Wind capacity (Mar 2026):** 56.09 GW installed; 6.05 GW added in FY26 (highest ever annual addition)
- ✦ **Distributed RE share:** 16.3 GW of distributed solar in FY26 contributing 36% of total RE additions
- ✦ **NDC milestone hit:** 50% non-fossil capacity reached June 2025, five years ahead of schedule
- ✦ **Global rank (IRENA, Dec 2025):** India 3rd, ahead of Brazil; behind only China and the United States

TRACK 2: Conventional Building Alongside

Base-load capacity built ahead of demand

- ✦ **Coal capacity awarded in FY26:** 13.32 GW of new coal-based thermal capacity awarded in FY 2025-26
- ✦ **FY26 coal stock at plants:** 51.7 MT held as on 21 Dec 2025; targeted at 66 MT by Mar 2026
- ✦ **Long-term capacity need:** India is projected to need 307 GW of coal + lignite by FY35. of which 97 GW of net additions are planned
- ✦ **Thermal plant utilisation:** All-India PLF at 65% with flexibility being raised to integrate variable RE

What this means for us:

We are building on both tracks. Our 5,960 MW thermal portfolio sits inside the conventional expansion lane, while our planned 10,110 MW renewable build-out by 2030 places us inside the 500 GW national pipeline. The dual mandate is our mandate.

Why Conventional Energy Remains Useful



Even with renewables scaling fast, conventional generation is doing the work of keeping India's grid stable today

Conventional Energy's Role in FY26

73%

Coal + lignite share of total generation in FY26 Q4

67%

Thermal share on FY26 peak day (165 GW of 246 GW total)

89 of 90

Q4 FY26 days where peak fell in solar hours; evening peak still served by thermal

31 GW

Solar + wind curtailed in Q4 FY26; thermal absorbs the variability

What Conventional Energy does for the Grid Today

India's Lignite Resource (as on 1 April 2025)

47,370.54 MT

Total geological lignite resource; concentrated in 3 states

Tamil Nadu: Approximately 79% of the national resource base; Rajasthan: Second-largest reserves; Gujarat: Third-largest reserves

Why Lignite Still Matters

- ✦ Mine-mouth thermal model
- ✦ Lignite is a low-cost indigenous fuel; pithead plants minimize logistics cost and lock in supply
- ✦ FY26 (Upto Dec'25) all-India lignite output; 28.32 MT, of which NLC India Limited contributes 14.45 MT (approximately 51%)
- ✦ Lignite-thermal in the grid today
- ✦ India has 6.62 GW of lignite-based thermal capacity in operation as on 31 Oct 2025

Lignite Resource Base: India's Indigenous Fuel

Indicator	Status / Target
Base-load anchor	Coal + lignite generated 339 BU of electricity in Q4 FY26, supplying continuous round-the-clock power that solar and wind cannot deliver on their own
Variability balancer	Thermal plants operate with growing flexibility, ramping down during solar hours and ramping up at night. In January 2026, output rose from 41,918 MW to 59,099 MW within hours
Fuel security at scale	FY26 captive and commercial coal dispatch reached 204.61 MT (+7.35% YoY) Coal India Limited held 129.96 MT closing stock on 31 March 2026

What this means for us:

Conventional energy is doing essential grid work today: serving base load, meeting the evening peak and absorbing renewable variability. Our market leadership in lignite, where we contribute approximately 51% of national output, places us at the centre of this story.

India's Growth Engine for the Decade Ahead



Renewables are now the principal engine of new capacity in India. A structured policy stack of bid visibility, demand schemes, domestic manufacturing, energy storage and capital flows is de-risking the build-out from today's 283 GW non-fossil base to the 500 GW target by 2030

50 GW / year

Pace required from FY26 to FY30 to reach the 500 GW NDC target

75%

Share of FY26 capacity additions that came from renewables

70%

Non-fossil share of India's installed mix by FY36 in CEA's projection

USD 2.2 Tn

Power-sector investment estimated by Government over the next two decades

Where NLC India Limited Plugs In

303 MW

Renewables added to our portfolio in FY26

600 MW+

1,800 MWh SECI solar + storage awarded to NIRE

2.26 BU

Green power generated in FY26

Two JVs

Two new JVs NIRE x NCRTC and NIRE x MAHAPREIT (FY26)

Policy Stack: What Locks in the Pipeline

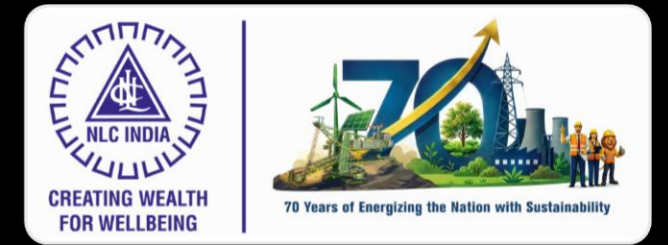
Indicator	Status / Target
Bid visibility	<ul style="list-style-type: none"> ★ MNRE Bidding Trajectory: 50 GW of RE bids per annum (incl. ≥10 GW wind) from FY24 to FY28
Demand-side scheme	<ul style="list-style-type: none"> ★ PM Surya Ghar Muft Bijli Yojana: 9,566.89 MW rooftop solar added since Feb 2024 ★ Target: 1 crore households by FY27
Domestic manufacturing	<ul style="list-style-type: none"> ★ PLI scheme: ₹24,000 Cr outlay ★ 48.3 GW of module capacity awarded across two tranches ★ Solar module manufacturing capacity grew from 2.3 GW (2014) to 172 GW (Mar 2026)

What this means for us:

This stack turns the 500 GW gap into a buildable pipeline. Anchored by NIRE, we are positioned inside the corridor as a meaningful CPSE contributor.

06

Strategic
Overview



From a Thermal Generator to a Diversified Energy Platform



Why We Are Pivoting: The National Mandate

At COP26, India committed to the Panchamrit framework, five pledges that reshape every energy enterprise's mandate

Government Commitment	How Our Pivot Aligns
500 GW non-fossil capacity by 2030	We target 10,110 MW of RE by 2030 – a direct contribution to the national pipeline
50% of installed capacity from non-fossil sources by 2030	RE to form ~50% of our own generation mix by 2030, from a fossil-dominated base
Net Zero by 2070; emission-intensity cut of 45% by 2030	~₹50,000 Cr RE investment plan; targeting ~16 MT of CO ₂ offset by 2030

How the Pivot Has Unfolded

The shift moved through three deliberate phases, moving from the initial renewable foothold, to a structural reorganisation, that ultimately culminated into a diversified platform

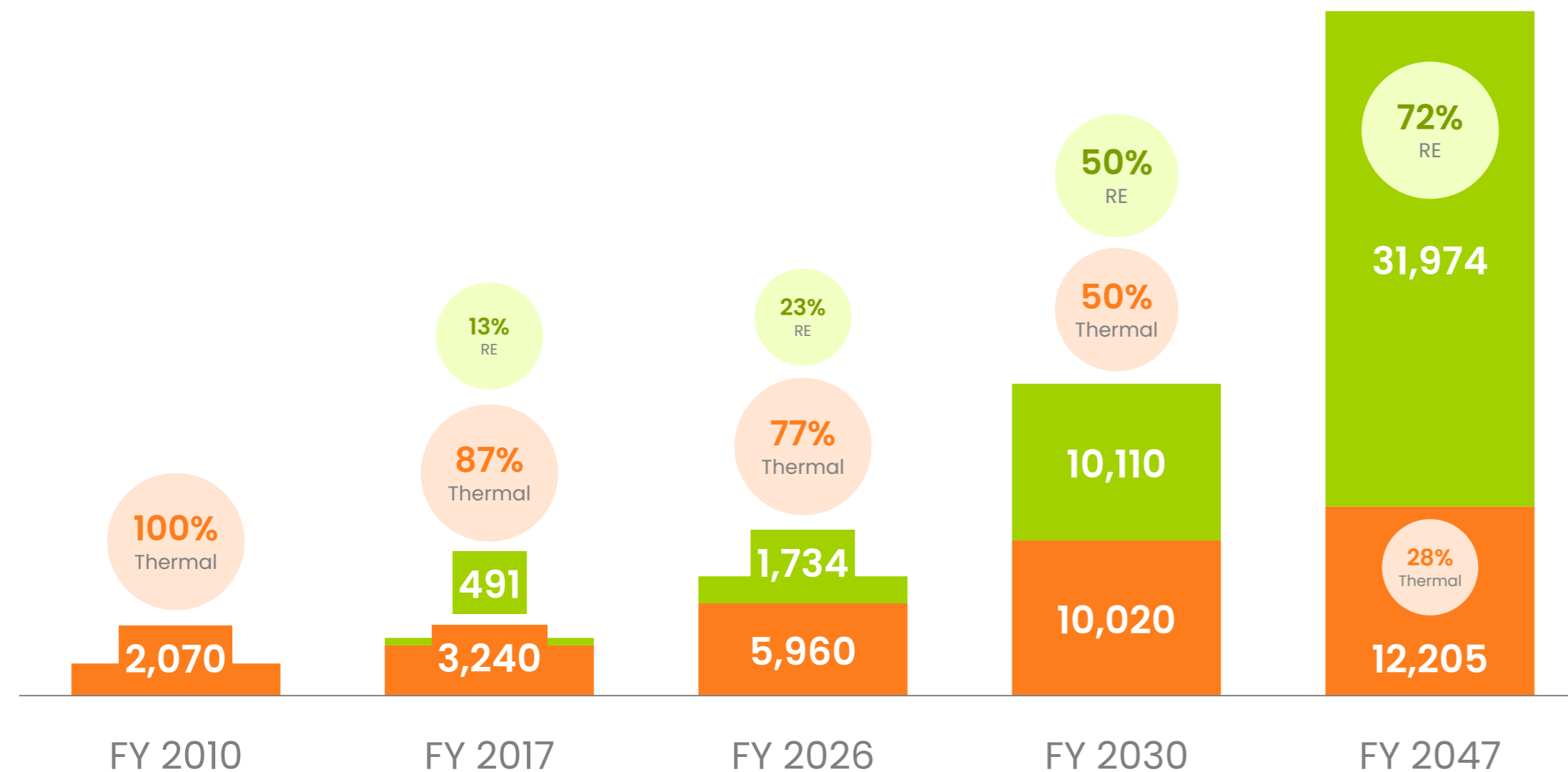
Phase	The Shift
Entering Renewables (to FY20)	Built our first renewable base. Scaled solar past the 1 GW mark, establishing renewables
Building the Structure (FY21-FY25)	Created dedicated renewable vehicle - NIRL. NLCIL secured CCEA approval for investment up to ₹7,000 Crore equity in NIRL
Diversified Platform (FY26 onward)	Moved beyond generation into storage, critical minerals and green hydrogen. Committed to no new conventional fossil-fuel assets beyond 2030

From a Thermal Generator to a Diversified Energy Platform



Our Capacity Mix

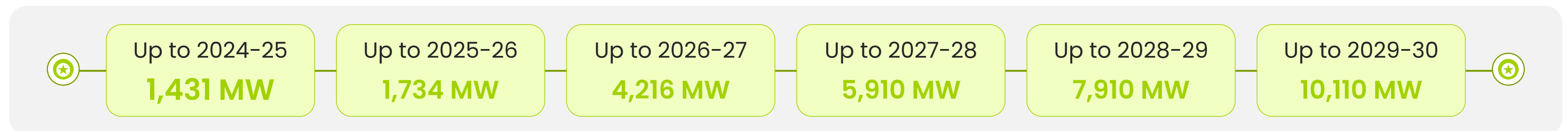
■ Thermal ■ RE



NLC India's Renewable Energy Vision in Action

	Current Capacity	Target Capacity
	1.8 GW Renewable Energy Capacity	10.11 GW Renewable Energy Capacity
5.6x Growing Our Impact By		
Clean Power Generated Annually	3.06 Billion Units	17.2 Billion Units
Indian Homes Powered For One Year	27 Lakh Homes	1.5 Crore Homes
Coal Saved Annually	14.4 Lakh Tonnes	80.9 Lakh Tonnes
Co ₂ Emissions Avoided Annually	21.6 Lakh Tonnes	121.3 Lakh Tonnes
Trees Equivalent Clean air Impact Annually	9.9 Crore Trees	55.6 Crore Trees

RE Capacity Additions Planned



The Pipeline to 2030



Mining

Ongoing – Project	Capacity	Cost (₹ Cr)	Status
South Pachwara coal block	9 MT	2,243	Coal production commenced in March 2026
Upcoming – Project	Capacity	Cost (₹ Cr)	Expected Mining Opening
MINE III (Neyveli)	11.5 MT	3,156	Under Planning Stage
Gurha Lignite Mine	1 MT	300	Under Planning Stage
Bithnok Lignite Mine	2.25 MT	600	Under Planning Stage
Machhakata	30 MT	6,123	FY 2031–32
North Dhadu	3 MT	1,354	FY 2028–29
New Patrapara	12 MT	4,000	FY 2031–32
Critical Minerals – Semhardih and Raipura Phosphorite & Limestone Blocks			Recently owned by NLCIL & Under Planning

Thermal

Ongoing – Project	Capacity	Cost (₹ Cr)	Status
NUPPL Ghatampur (UP) – Unit I			Dec 2024 (Actual)
NUPPL Ghatampur (UP) – Unit II	1,980 MW	21,781	Dec 2025 (Actual)
NUPPL Ghatampur (UP) – Unit III			Jun 2026 (Expected)
Upcoming – Project	Capacity	Cost (₹ Cr)	Expected COD
Odisha Pithead TPS (Phase I)	2,400 MW	27,213	LOA Issued: U-1: Feb 30 U-2: Aug 30 U-3: Feb 31
Odisha Pithead TPS (Phase II)	800 MW	7,179	Under Planning
TPS II 2nd Expansion	1,000 MW	11,653	Under Planning / NIT Floated
Rajasthan Lignite Thermal	375 MW	4,000	Under Planning

The Pipeline to 2030

Renewables

Ongoing – Project	Capacity	Cost (₹ Cr)	Expected COD
Solar 200 MW CPSU	200 MW	1,221	200 MW by Dec 2026
150 MW Wind-Solar Hybrid	150 MW	865	50 MW Wind – Jun 2026; 100 MW Solar – Dec 2026
Solar 50 MW (In Neyveli @ Mined out area)	50 MW	218	Jun 2026
Solar 600 MW Gujarat	600 MW	3,336	Sep 2026
Solar 810 MW (Rajasthan)	810 MW	4,788	Mar 2028
(BESS) 250 MW / 500 MWhr TNGECL	250 MW	700 ¹	Mar 2027 (NIT floated)

Upcoming – Project	Capacity	Cost (₹ Cr)	Status
Wind (SJVN)	200	1,300 ¹	NIT floated
Hybrid RE (NGEL)	450	3,500 ¹	Under Planning Stage
NCRTC	110	550 ¹	Under Planning Stage
600 MW Solar & 300 MW/1800 MWhr BESS	600 & 1,800 MWhr	7,000 ¹	Under Planning Stage
Wind project (Odisha)	99	700 ¹	Under Planning Stage
Assam JV	1,000	5,500 ¹	Under Planning Stage
Rajasthan JV	2,000	10,000 ¹	Under Planning Stage
Mined out area	100	590 ¹	Under Planning Stage
Pumped storage (Odisha)	750	3,600 ¹	Under Planning Stage
Competitive bidding	2,000	10,000 ¹	Under Planning Stage

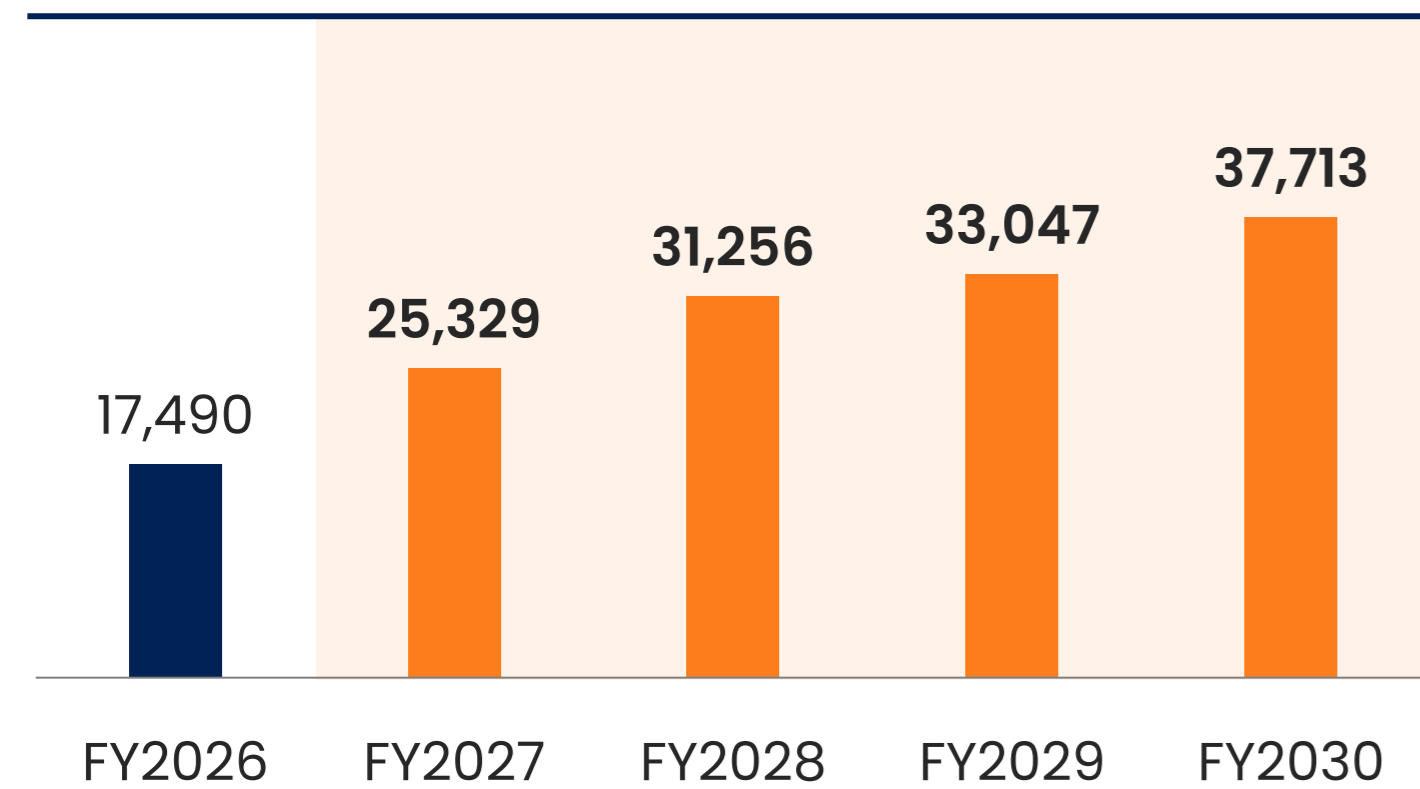
¹ Project cost indicated is tentative in nature.



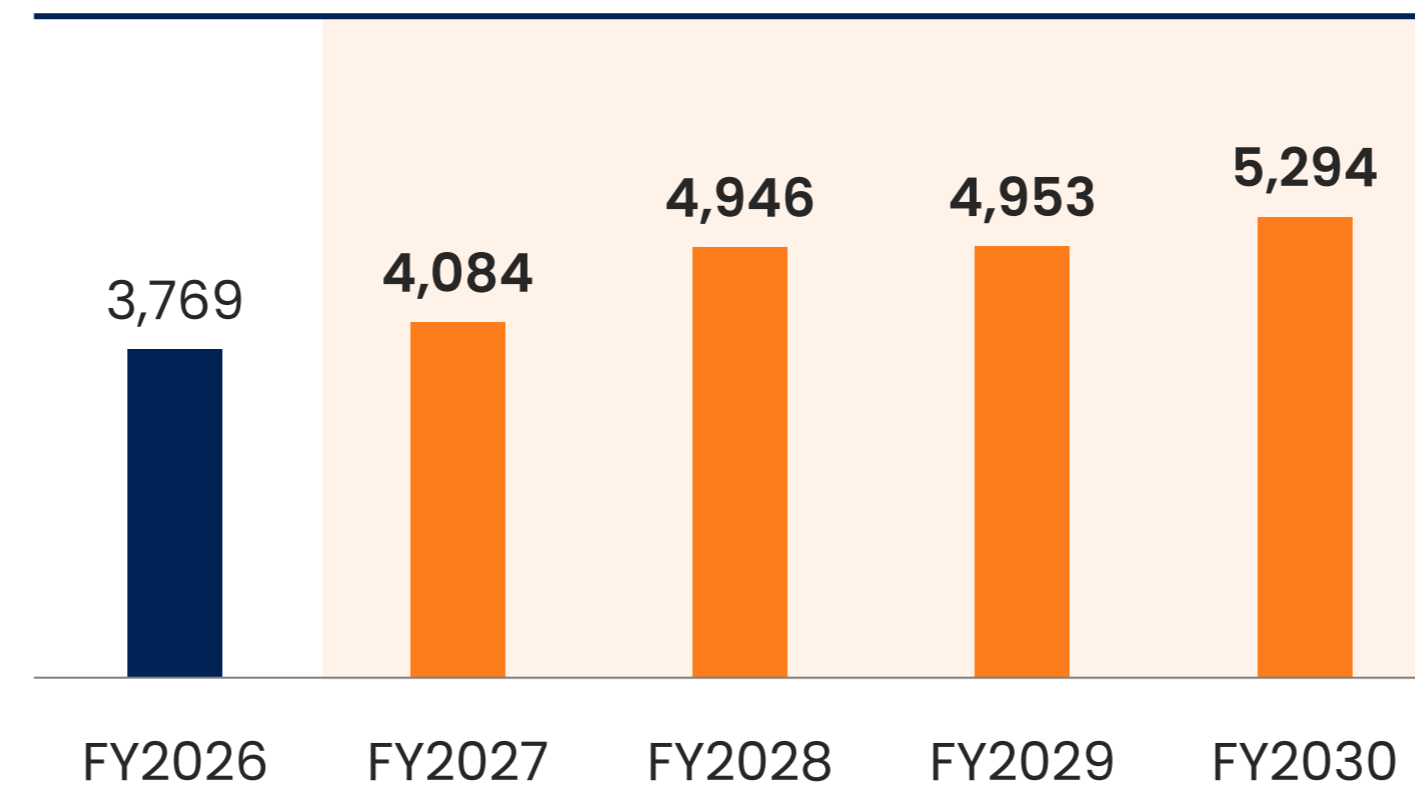
Group Financial Overview of NLCIL Group for the Next 4 Years



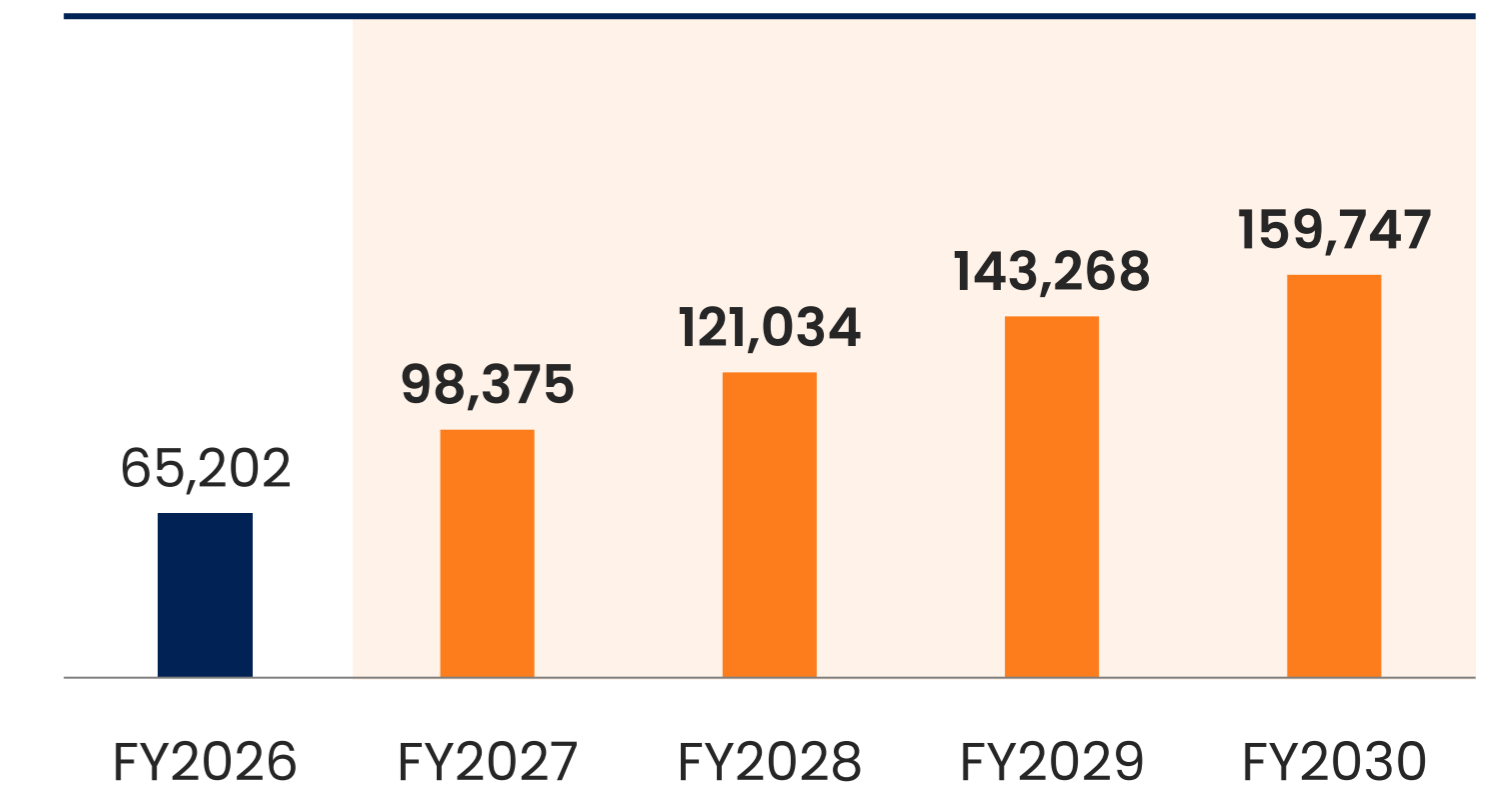
Revenue from Operations (₹ in Cr)



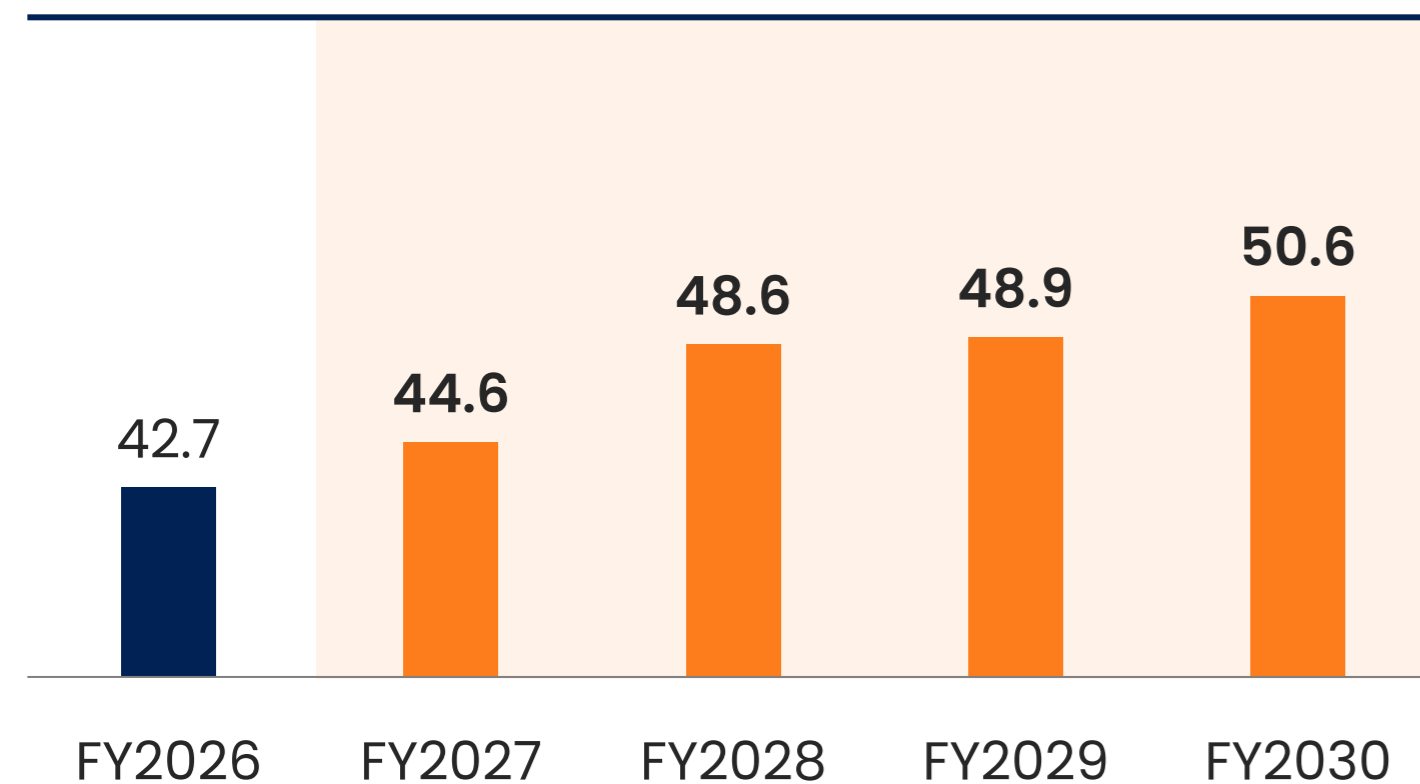
Profit After Tax (₹ in Cr)



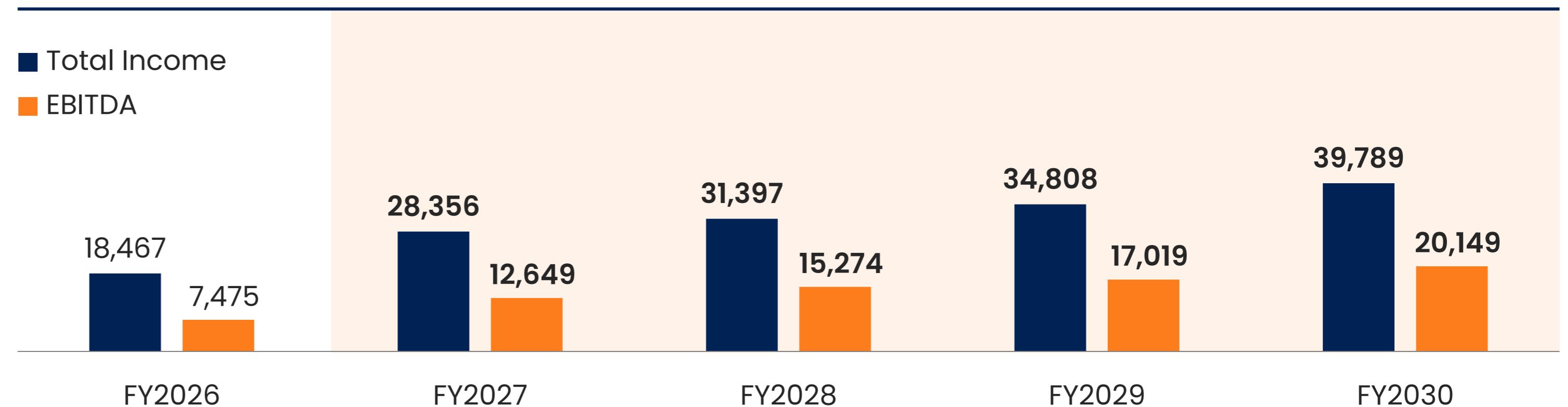
Assets (₹ in Cr)



EBITDA Margin (%)



Financial Parameters (₹ in Cr)

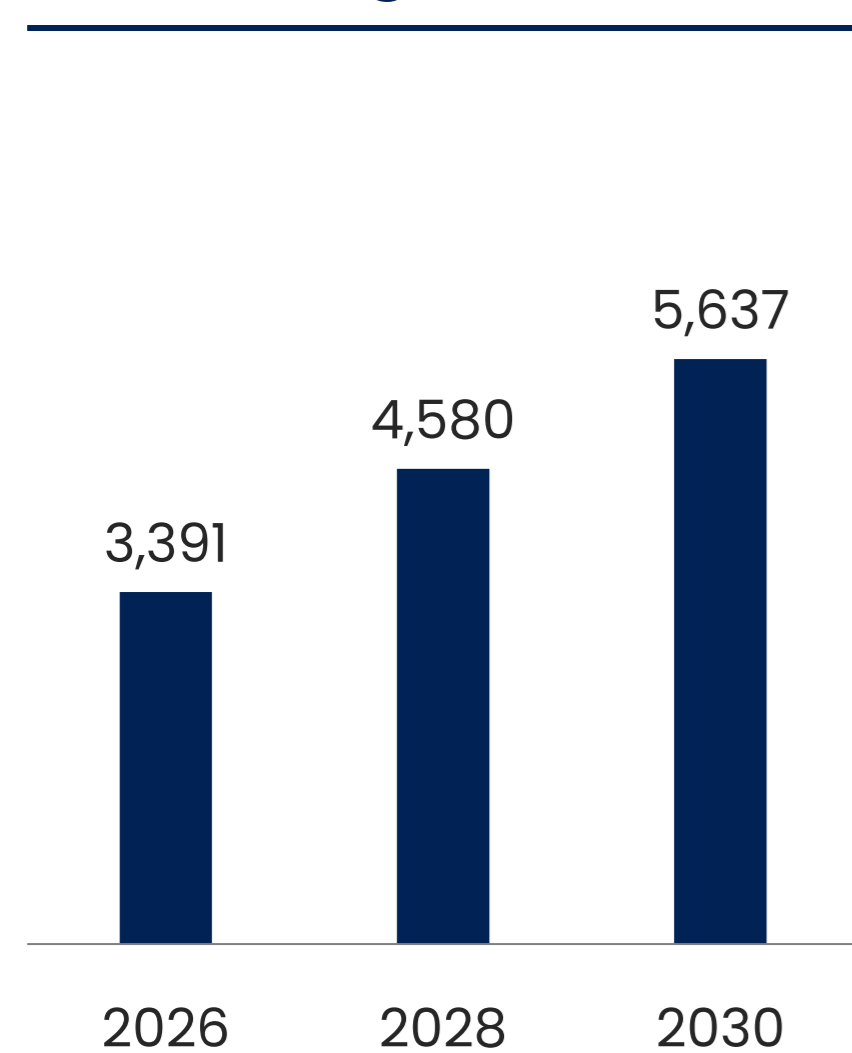


NLCIL @2030: Equity Outlook

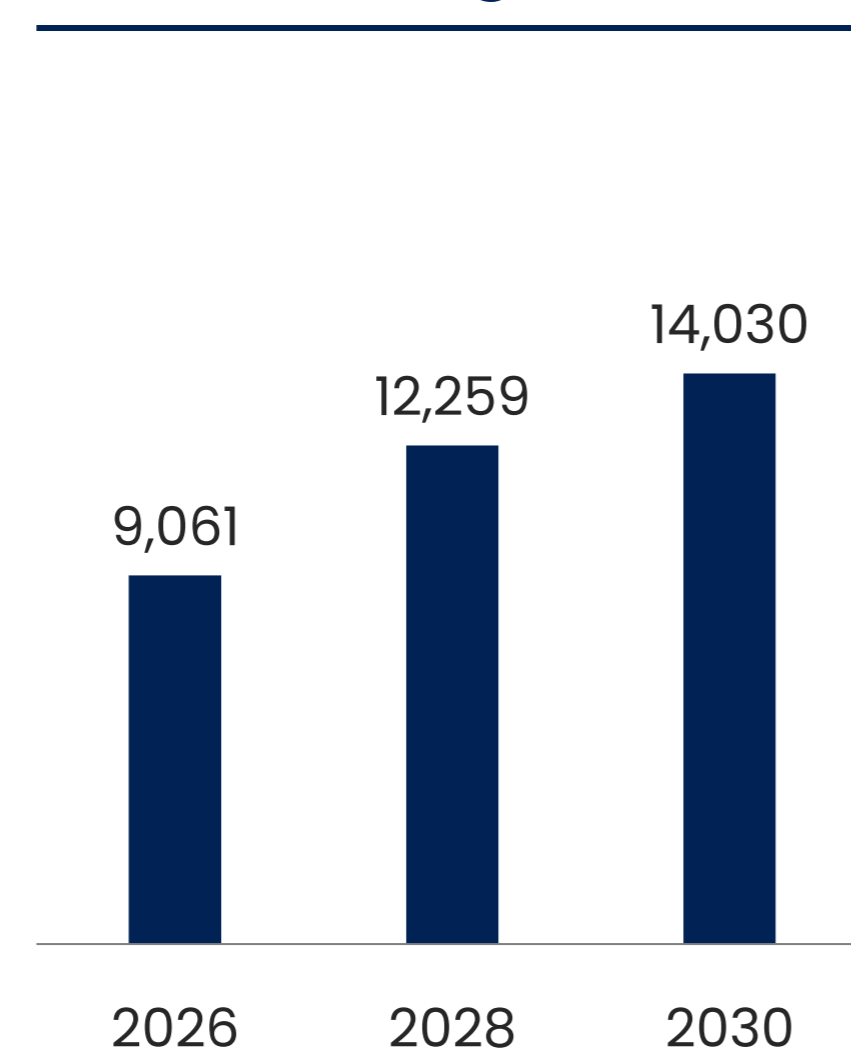


Regulated Equity (₹ in Cr)

Mines Regulated

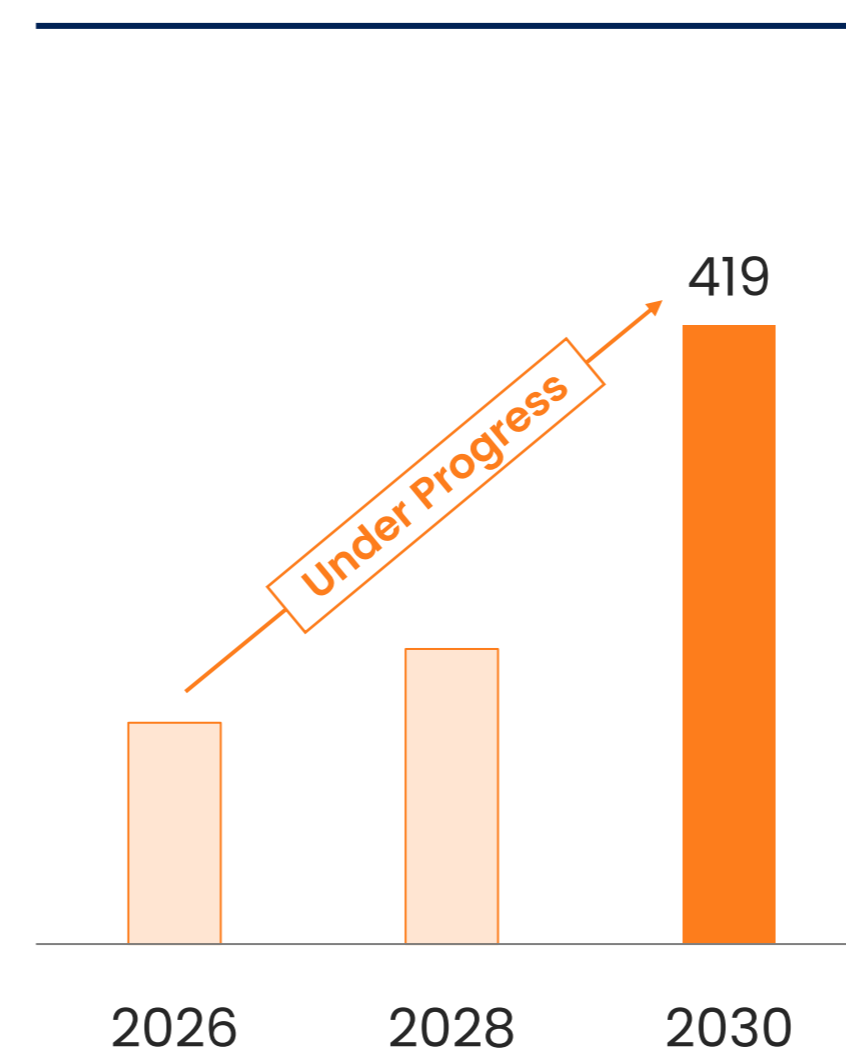


Thermal Regulated

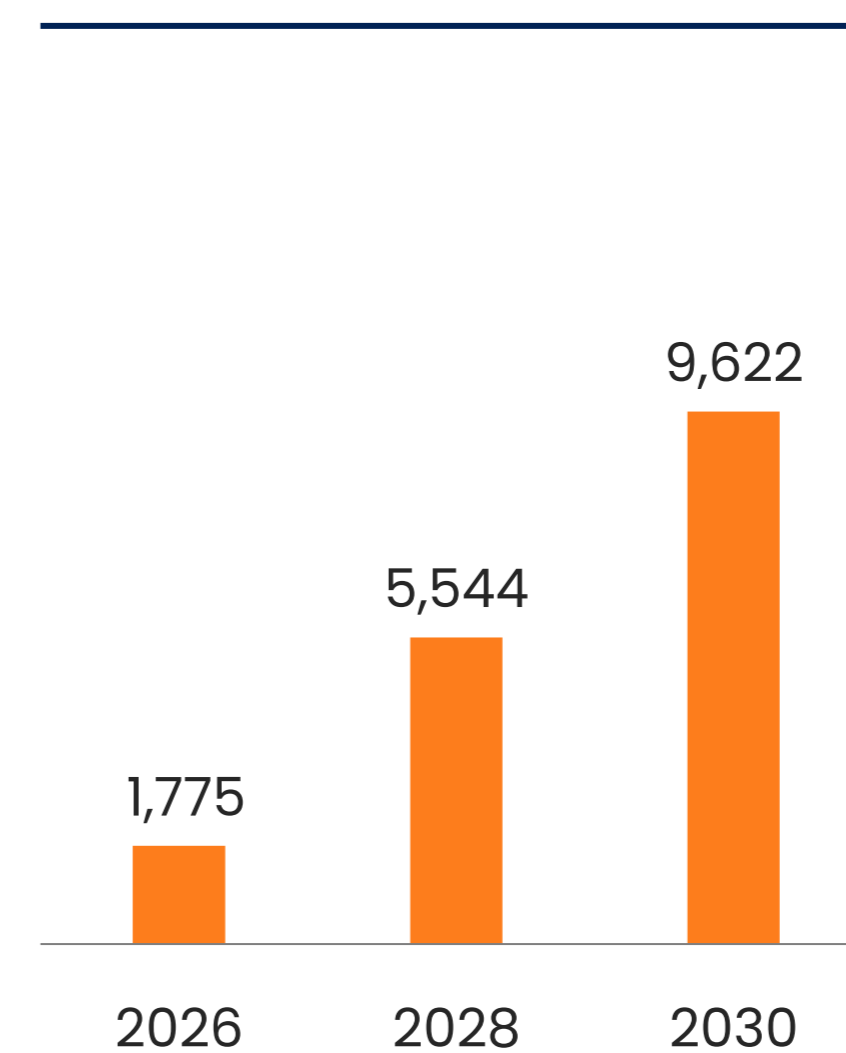


Non-Regulated Equity (₹ in Cr)

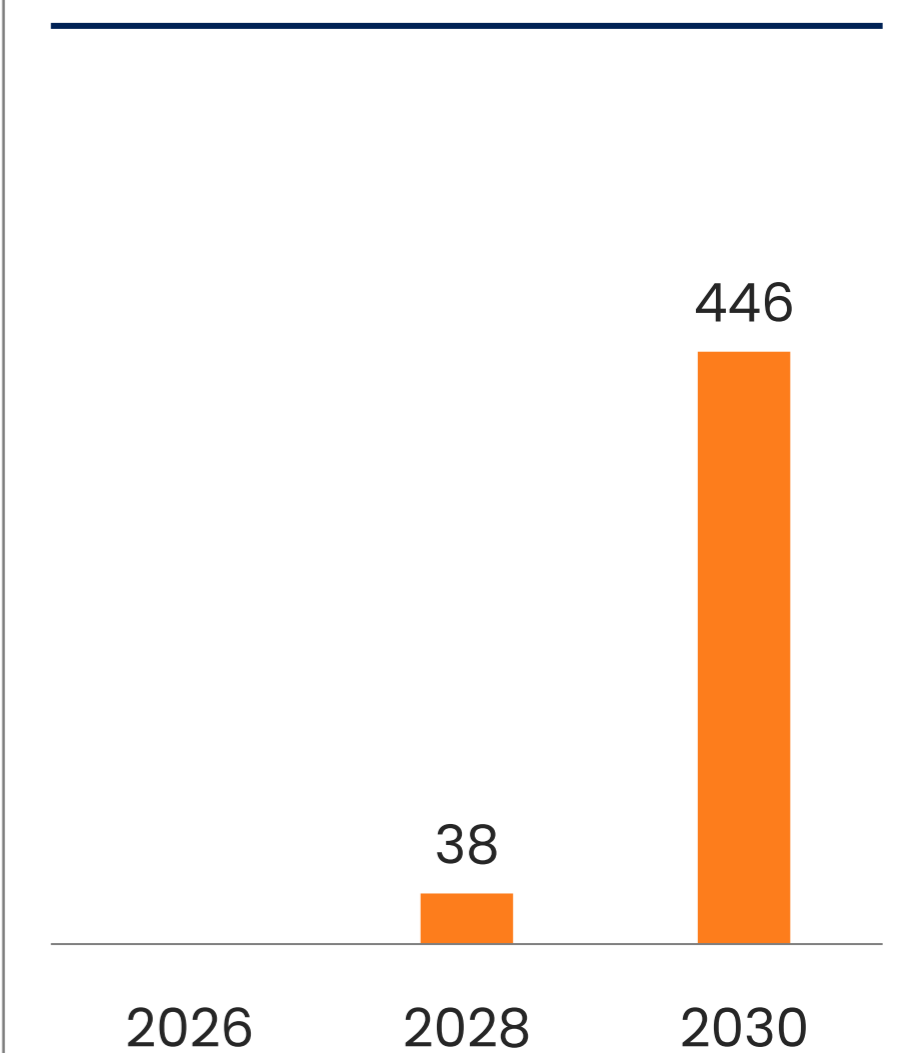
Commercial Mines



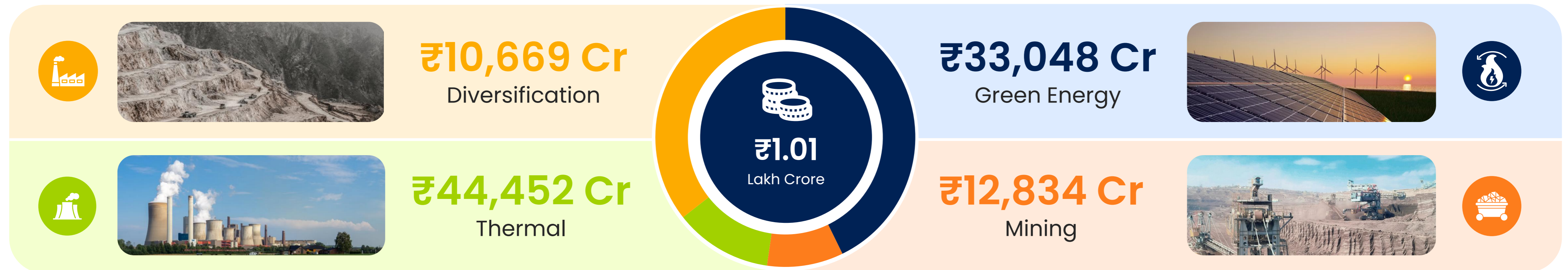
Renewables



Diversification



NLCIL @2030: Capex Plan



Green Energy

Particulars	MW	Cost (₹ in Cr)
Existing	1,734	-
Ongoing	1,807	3,704
Up Coming	4,969	18,944
Pumped Hydro	1,600	10,400
Total Green	10,110	33,048

Mining

Particulars	MTPA	Cost (₹ in Cr)
Existing	50.10	-
Ongoing	9	1,162
Up Coming	44.25	8,618
Critical Mineral	1	3,054
Total Mining	104.35	12,834

Thermal

Particulars	MW	Cost (₹ in Cr)
Existing	5,960	-
Ongoing	660	1,000
Up Coming	3,400	43,452
Total Thermal	10,020	44,452

Diversification

Particulars	Cost (₹ in Cr)
OB to Sand	3
Others (Including Coal/Lignite Gasification)	10,666
Total	10,669

The Road Ahead



Our journey has brought us to an inflection point. The next five years are about scale, balance, and the alignment of our portfolio with where the country is going

The Foundation

What Stays the Same

Our integrated mine-power model, our base-load reliability, and our Government of India alignment all remain unchanged through the transition

The Pivot

What Scales Up

NIRL, our wholly-owned subsidiary, anchors a near six-fold scaling of renewable capacity to 10,110 MW by 2030. This brings Clean and Green energy to parity with our thermal portfolio

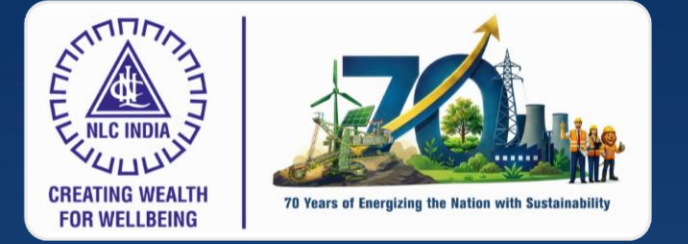
The Opening

What is New

Critical minerals, Green Hydrogen, Lignite-to-Methanol, BESS and EV charging open entirely new revenue lines for the decade ahead, layered on top of our regulated core

**We will exit FY 2030 as a Balanced 20,130 MW Integrated Energy Platform,
Contributing Meaningfully to India's 500 GW non-fossil Pathway**

07 | ESG Overview



Putting a Number to Our Intent



Independent external assessments have formally affirmed our ESG progress over the year



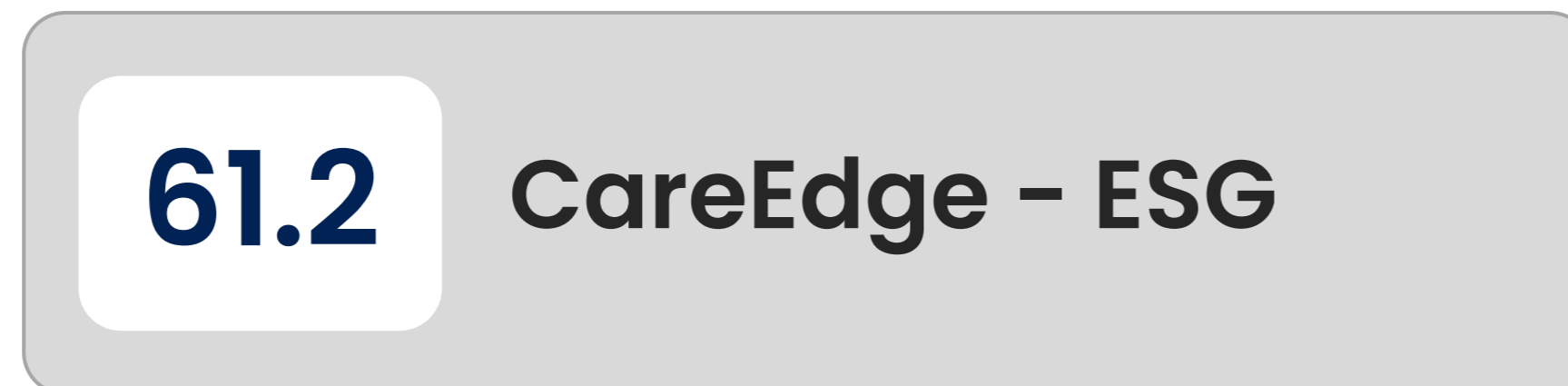
ESG Vision

To continue to be a socially responsive company



ESG Mission

To play an active role in society and be sensitive to emerging environmental issues



Environment

<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">44.9</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">CareEdge RATINGS</div>	<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">46.0</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">ICRA A MOODY'S INVESTORS SERVICE COMPANY</div>
<p style="font-style: italic;">Industry Average: 40.1</p>	

- ★ Achieved 100% safe waste disposal
- ★ Complete utilisation of Fly Ash

Social

<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">73.4</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">CareEdge RATINGS</div>	<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">75.0</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">ICRA A MOODY'S INVESTORS SERVICE COMPANY</div>
<p style="font-style: italic;">Industry Average: 69.0</p>	

- ★ ISO 45001 certified across operations
- ★ Regular fire, safety & health audits by enterprise-wide
- ★ Employee well-being expenditure at 1.5%, against the industry average of 0.2%

Governance

<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">75.7</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">CareEdge RATINGS</div>	<div style="background-color: white; border-radius: 10px; padding: 5px; font-size: 24px; font-weight: bold;">66.0</div> <div style="font-size: 12px; font-weight: bold; margin-top: 5px;">ICRA A MOODY'S INVESTORS SERVICE COMPANY</div>
<p style="font-style: italic;">Industry Average: 65.5</p>	

- ★ Board-level ESG Committee steering Group sustainability strategy
- ★ Dedicated Sustainable Development Cell driving on-ground execution

Greener, Year on Year



What We've Delivered

- ◆ 7.269 MU energy conserved in FY 2025-26 through efficiency measures across operations
- ◆ Established 14 industrial service units to drive adoption of energy conservation measures
- ◆ Installed energy-efficient equipment across operations Conducted energy audits at Thermal Power Stations
- ◆ Reduced idle running hours of crushers at TPSs
- ◆ Deployed timer-controlled units for outdoor lighting
- ◆ Added capacitor banks to induction motors to improve power factor
- ◆ Extensive biological reclamation and biodiversity studies around mining areas

Where We Are Heading Next

- ◆ Improved reporting frameworks for waste and emissions
- ◆ Develop a target for emission reduction
- ◆ Adopting advanced emission reduction technologies, alongside ongoing research and development in Carbon Capture, Utilization, and Storage
- ◆ Aiming for an environmental score of around 60



The People Behind the Power

A multi-vertical workforce backed by structured training, safety systems and inclusion frameworks



9,735

Total Workforce

31,964

Training Hours

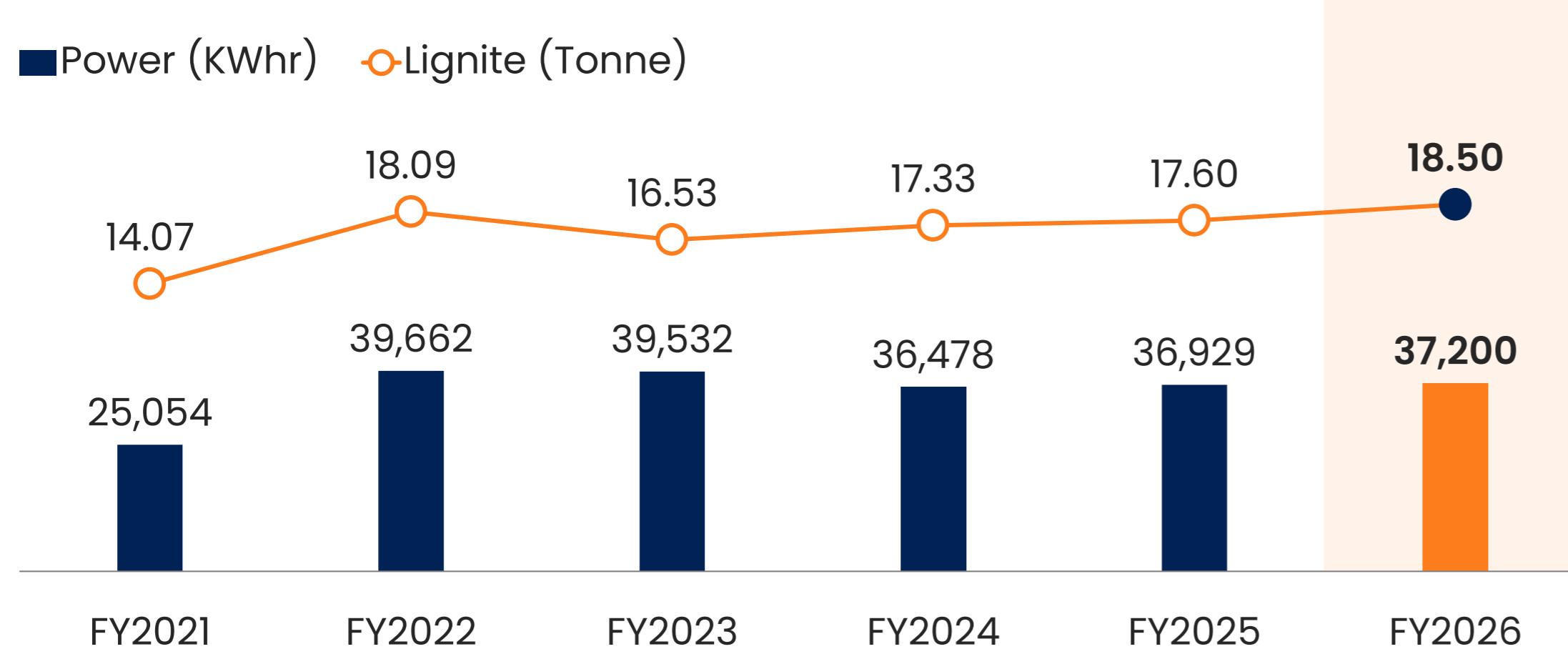
757

Women in Workforce

NSCSTI 2-Star

L&DC Accreditation

Standalone Efficiency – Output per Man Shift



Where We Are Heading Next

- ◆ Fair and equitable compensation across all roles and levels
- ◆ Safe and inclusive workplaces embedding inclusion alongside safety
- ◆ Skill-enhancement and leadership programs for the workforce of tomorrow
- ◆ Aiming for a social score of around 75



Investing Where We Operate

We consistently invest in the areas surrounding our mines and power stations to drive inclusive growth



₹48.06 Cr

CSR Expenditure in FY26

9 lakh across 3 states

Total Beneficiaries

Focus Areas

- ♥ Healthcare (61%)
- 📖 Education & Skills (21%)
- 🏠 Rural Development (7%)
- 🏛️ Administrative Overheads (5%)
- 🎨 Art & Culture (4%)
- ⚙️ Others (2%)

Our Major CSR Projects in FY 2025-26

Six flagship projects delivered the bulk of our CSR work, each producing measurable outcomes for the communities around our operations.

<p>Accessible Healthcare ₹29.53 Cr</p> <p>Improved healthcare access through hospitals, medical equipment, and rehabilitation support. Enhanced quality care & reduced IMR & MMR in rural areas</p>	<p>Education and Skills ₹10.39 Cr</p> <p>Upgraded schools, provided student transport, and supported higher education. Improved access to quality and inclusive education</p>	<p>Rural Development ₹3.32 Cr</p> <p>Focused on water supply, roads, sanitation, street lighting, and river restoration. Improved infrastructure, hygiene, and connectivity in rural regions</p>
<p>Administrative Overheads ₹2.24 Cr</p> <p>Covers CSR planning, implementation, monitoring, reporting, and related staff, travel, and compliance costs to ensure effective execution & governance</p>	<p>Art and Culture ₹1.43 Cr</p> <p>Includes painting, sculpture, architecture, photography, and written texts that capture human imagination</p>	<p>Others ₹1.15 Cr</p> <p>Included environmental and sanitation initiatives. Supported sustainability and community well-being</p>

Governance



We boast a total of 16 Committees, with Each committee owns a defined remit; together they form a unified system of oversight aligned to the Board's strategic direction.

Statutory and Strategic

Audit Committee	Reviews financial reporting, internal controls, and statutory and internal audits
Risk Management Committee	Oversees the risk register and mitigation of strategic, business and operational risks
Nomination and Remuneration Committee	Frames remuneration policy and Performance Related Pay for executives, per DPE guidelines
Stakeholders' Relationship Committee	Resolves grievances of shareholders and debenture-holders
Corporate Social Responsibility Committee	Oversees CSR policy, projects and spend per Section 135
Environment, Governance and Sustainability Committee	Steers ESG strategy and oversees sustainability reporting

Core Values

N National Orientation	C Customer Focus
L Learning, Development and Resilient	O Organizational Pride and Growing Together
C Commitment to Excellence	M Mutual Trust and Team Work
I Innovation and Creativity	M Motivation
L Leadership and Loyalty	I Integrity, Accountability and Transparency
	T Total Quality and Total Wellness
	S Safety and Sustainability

Safeguarding the Future

A structured risk framework helps us anticipate, monitor, and respond to the most material threats to long-term value



External Risks

Regulatory and Tariff Norms

affecting power tariff determination

- ✦ Pursue legal recourse for entitlements and engage closely with regulators

Environmental Compliance

under evolving norms

- ✦ Secure timely statutory clearances through structured engagement with relevant ministries

Land Acquisition Delays

impacting project rollout

- ✦ Implement state-specific R&R policies, deploy digital land management tools, and proactively engage local stakeholders/communities

Operational Risks

Cost and Time Overruns

on projects under implementation

- ✦ Deploy digital progress-tracking tools, enforce legal safeguards in contracts, and utilize dedicated SPVs for specialized delivery

Lignite Mining Costs

from deeper overburden and input inflation

- ✦ Strategic outsourcing of mining activities, adoption of high-efficiency mining equipment and SMEs, and effective management of overburden and input costs mitigation measures for the missing risk

Market Risks

Demand-side Risk

from surrender of contracted power by beneficiaries

- ✦ Actively participate in power exchanges and bilateral contracts to optimize surplus power sales

Penal Exposure

on account of delays in commissioning of renewable energy projects

- ✦ Strengthen project execution frameworks emphasizing timely clearances and use dedicated SPVs to meet strict deadlines

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