



Date: 13<sup>th</sup> May 2026

<b>National Stock Exchange of India Limited,</b> Exchange Plaza, 5 <sup>th</sup> Floor, Plot No. C-1, G Block, Bandra- Kurla Complex, Bandra (East), Mumbai – 400051, Maharashtra, India <b>NSE Scrip Code – SKFINDUS</b>	<b>BSE Limited,</b> Phiroze Jeejeebhoy Towers, Dalal Street, Fort Mumbai – 400001, Maharashtra, India  <b>BSE Scrip Code -544572</b>
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**Subject: Intimation under Regulation 30 of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 (“SEBI LODR”) – Presentation on Analyst/Institutional Investor Meeting**

**Reference: Our Intimation Dated 8<sup>th</sup> May 2026**

Pursuant to Clause 15 (a)(ii) of Schedule III, Part A, Para A read with Regulation 30 (2), Regulation 30 (6), Regulation 46(2) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 (as amended from time to time) (“SEBI LODR”), SEBI Master Circular No. SEBI/HO/CFD/PoD2/CIR/P/0155 dated 11<sup>th</sup> November 2024, and our intimation dated 8<sup>th</sup> May 2026, we are hereby submitting the presentation of Earnings Call for the Financial Results for the Q4 FY 2025-26 scheduled today i.e. on 13<sup>th</sup> May 2026 at 3:00 pm (IST).

This Investor Presentation will be available shortly on the website of the company at <https://www.skf.com/in/investors/skf-india-industrial-ltd/financial-results>

The above is for your information and record.

Thanking you,

Yours faithfully,

**For SKF India (Industrial) Limited**

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**Poorva Bang**  
**Company Secretary & Compliance Officer**



# SKF India (Industrial) Limited – Investors Earnings call

4QFY26: January - March 2026

13<sup>th</sup> May 2026

## Disclaimer

The purpose of this presentation is to share our Q4FY26 results. We would like to remind you, some of the remarks may contain forward-looking statements, which are subject to risk, and uncertainties and actual results may defer materially. Such statements are based on management beliefs as well as assumptions made by and on the information currently available to the management. The audience is cautioned not to place undue reliance on these forward-looking statements and making any investment decision. The purpose of today's call is to purely educate and bring awareness about the company's fundamental business and the financial quarter under review.

Please note that financial information from 17th Dec 2024 to 31st Mar 2025 and from 1st Apr 2025 to 30th Sep 2025 as reported in this presentation has been extracted (and may involve some assumptions) by the management from the financial information of SKF India Limited pertaining to the demerger industrial undertaking, which are prepared in accordance with the Appendix C of Ind AS 103 "Business Combinations" by using the financial information maintained by the SKF India Limited ("Demerged Company").

# Agenda

1. Executive Summary
2. Economy update
3. Quarterly highlights – 4QFY26
4. Strategy & Success Stories
5. Q&A



## Summary| Solid net sales growth with margins improving QoQ.

### 1Q26: Jan to March 2026

▲ 9.8% QoQ  
9.5 BINR

Net Sales

▲ 1731 bps QoQ  
9.5%\*

PBT%

▼ 2.8% QoQ  
18.7%

NWC % of Sales

- During the quarter ended Dec 31, 2025, the Company accounted certain demerger expenses for IT Cost, professional services and stamp duty, including estimated transfer premium payable to statutory authorities to effect transfer of registration of land acquired under the Scheme , aggregating to 1.8 BINR, which have been included under "Exceptional items".
- During the quarter ended Mar 31, 2026, the Company accounted certain demerger expenses for IT Cost, aggregating to INR. 183 Million which has been included in "Other Expenses"

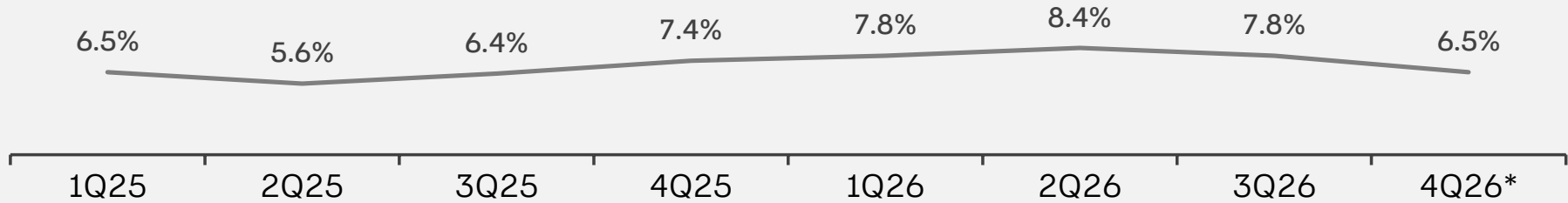
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# Economy Update

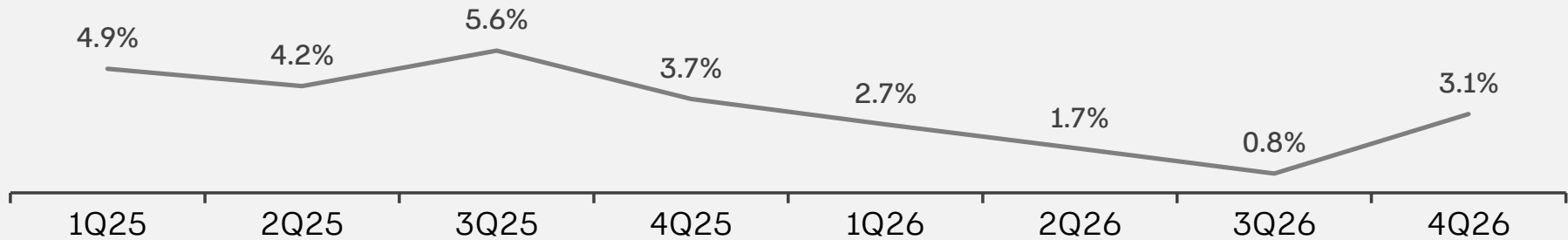


# Macro Update | GDP growth continues to remain strong despite inflation normalizing in 4FYQ26

GDP Growth (y-o-y)



CPI- Inflation Growth (y-o-y)



\* Projection  
Source : Ministry of Statistics

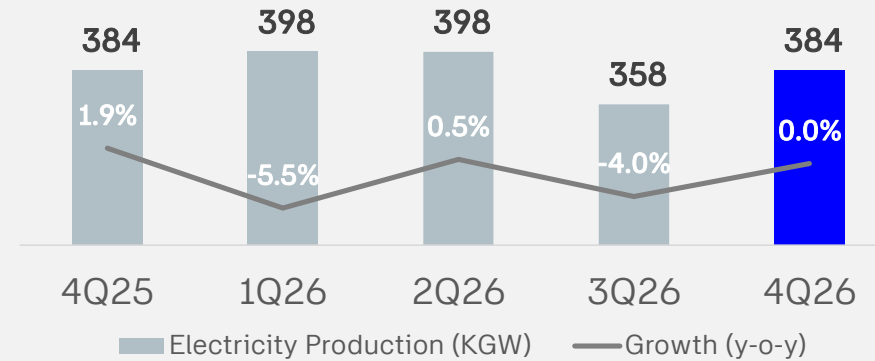


# Major Sectors Performance | Industrial production continues to remain strong in 4QFY26

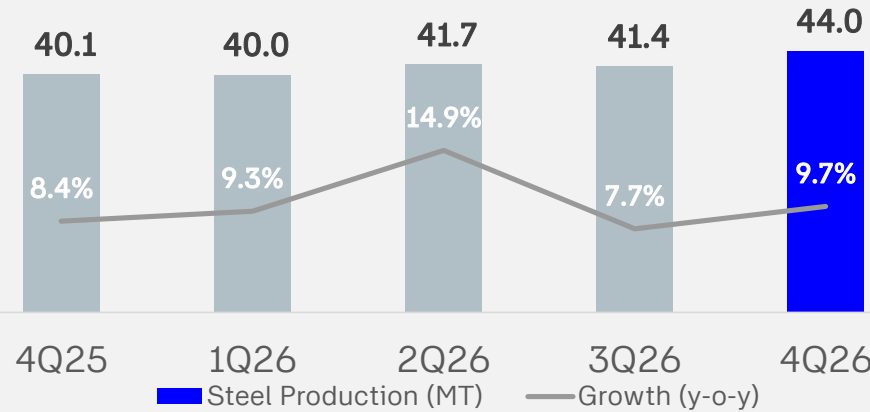
### IIP-Industrial Production Growth (y-o-y)



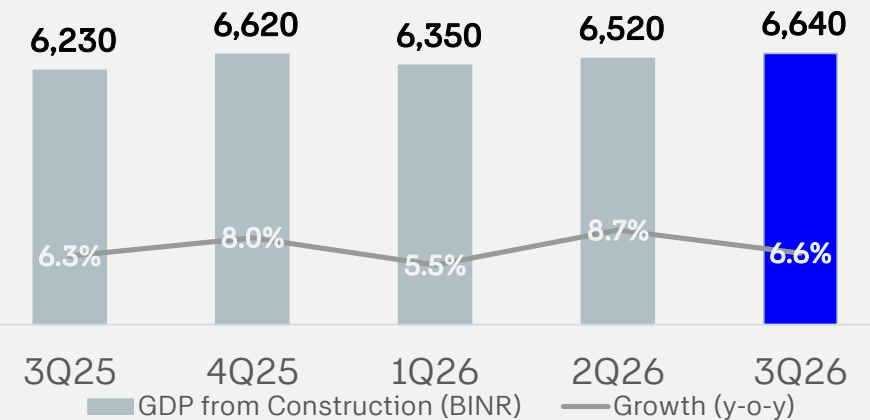
### Electricity Production (KGW)



### Iron & Steel Production Growth (y-o-y)



### Construction Growth (y-o-y)

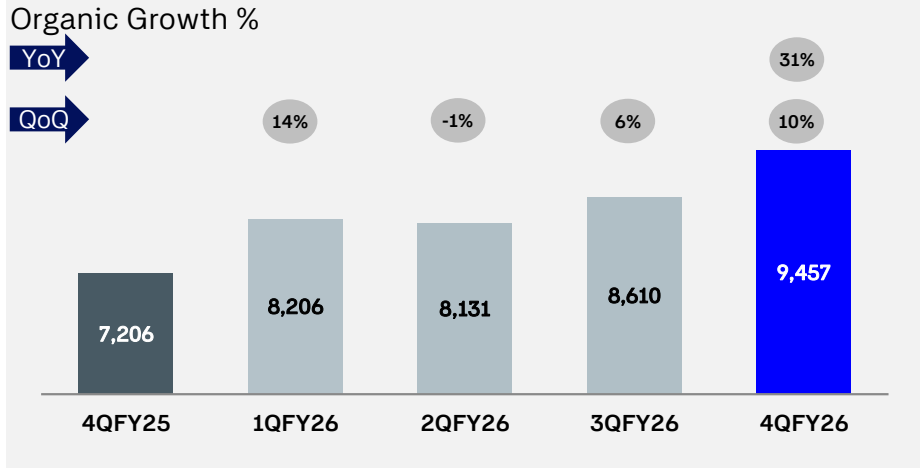


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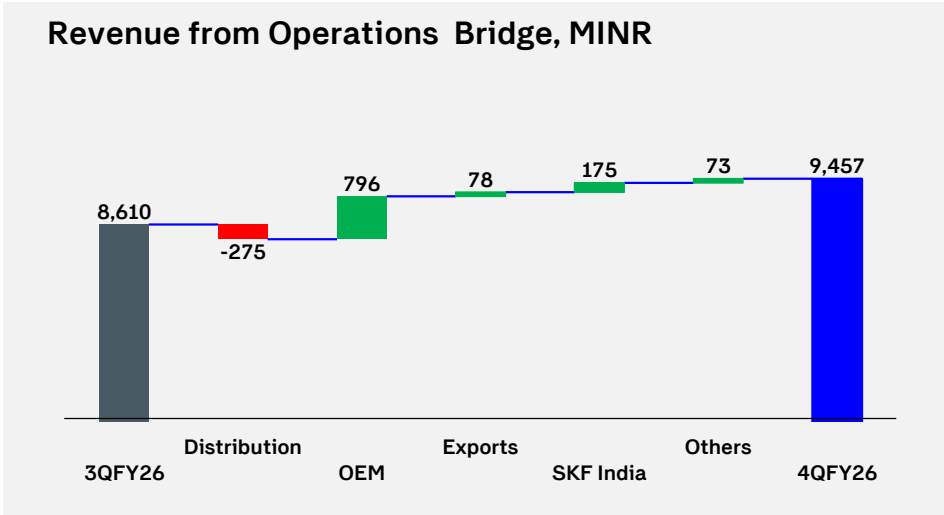
# Quarterly Highlights – 4QFY26

# SKF Sales by quarter | Delivered strong growth of 9.8% QoQ driven by sales to OEM and inter-company sales

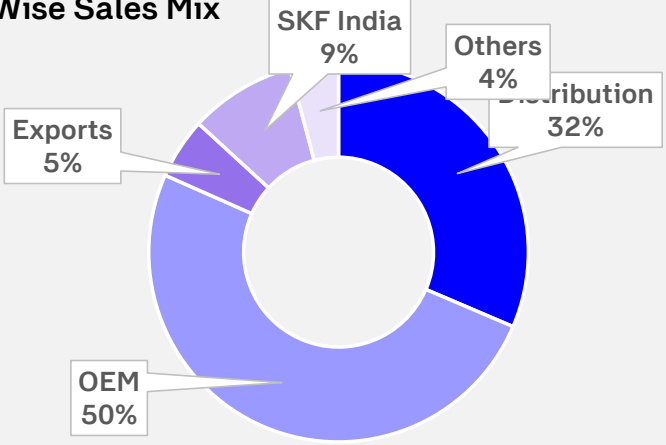
Revenue from Operations by quarter, MINR



Revenue from Operations Bridge, MINR



Segment Wise Sales Mix



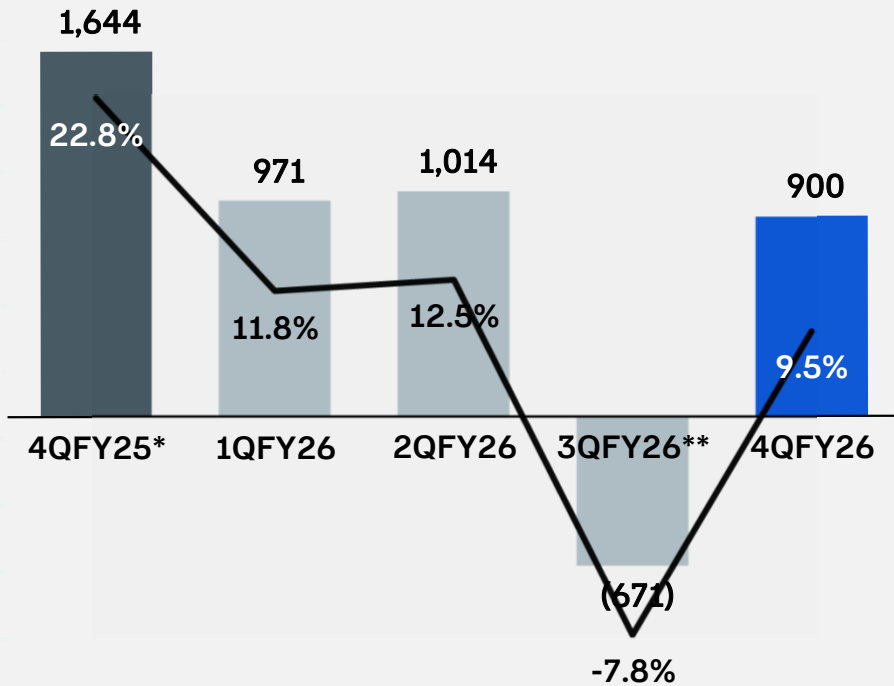
Segments Quarterly Growth %

Segments	Q-o-Q
Distribution	-8.5%
OEM	20.1%
Exports	18.9%
SKF India	25.7%
Others	23.3%



# Margin | Margins improved by 17.3% QoQ due to lower one-time demerger expenses

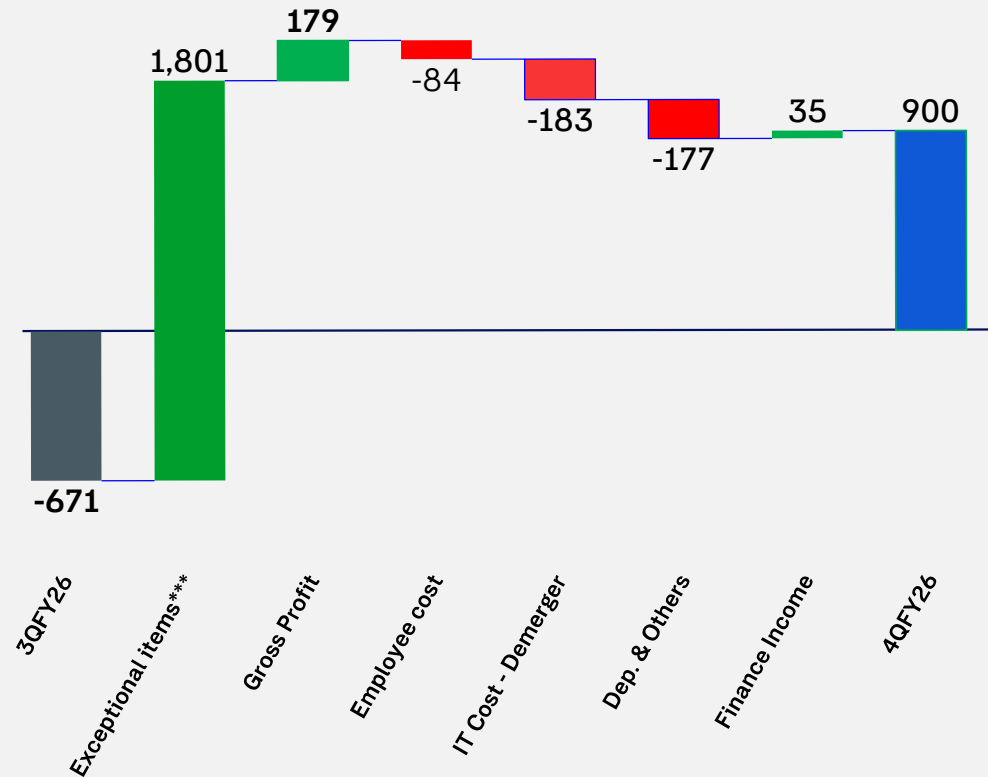
Profit before tax & Margin %, MINR



\* 4QFY25 includes one-time TP credit note of 1143 MINR

\*\* 3QFY26 includes one-time exceptional items of 1801.8 MINR related to demerger activities

Profit before tax, MINR



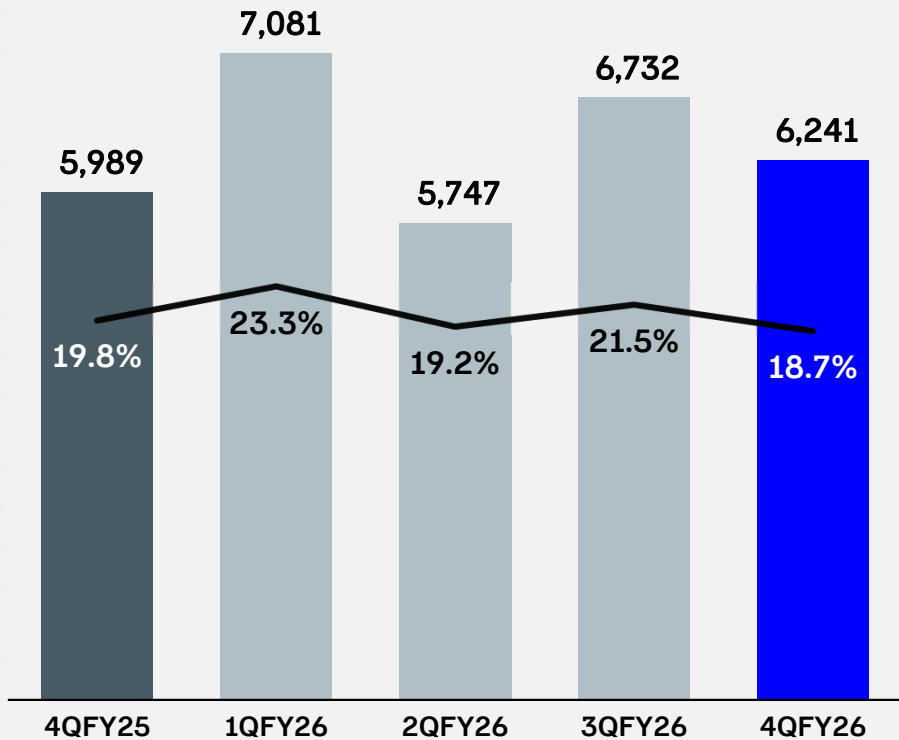
\*\*\* includes demerger expenses for IT Cost, professional services, stamp duty and land transfer premium



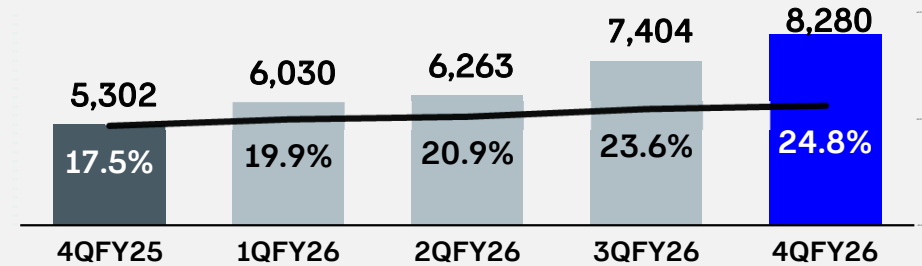
# NWC | Improved significantly due to improved NWC

Net working capital, MINR

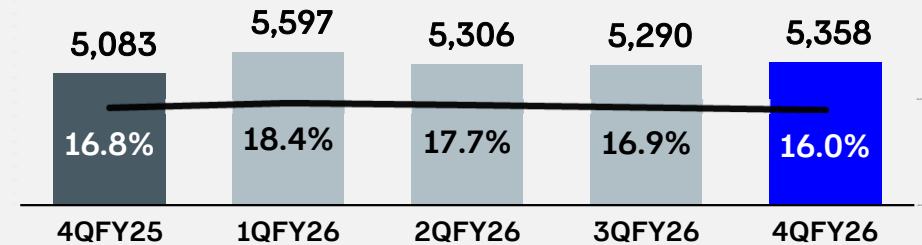
NWC % of Net Sales



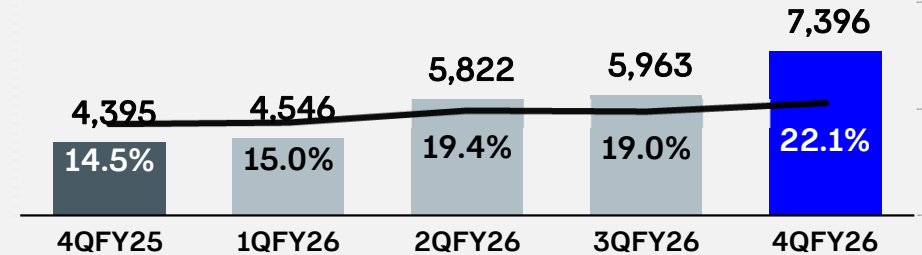
AR % of Net Sales



Inventory % of Net Sales

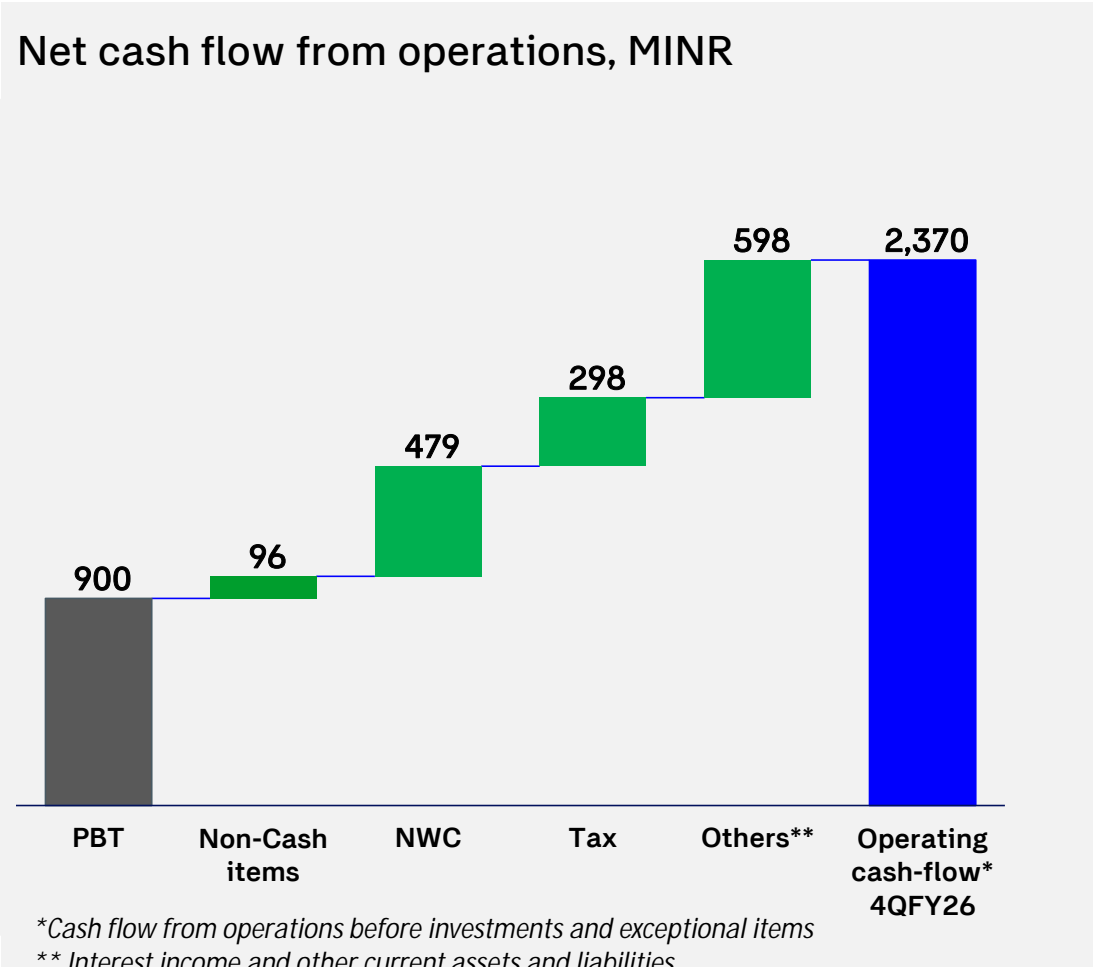
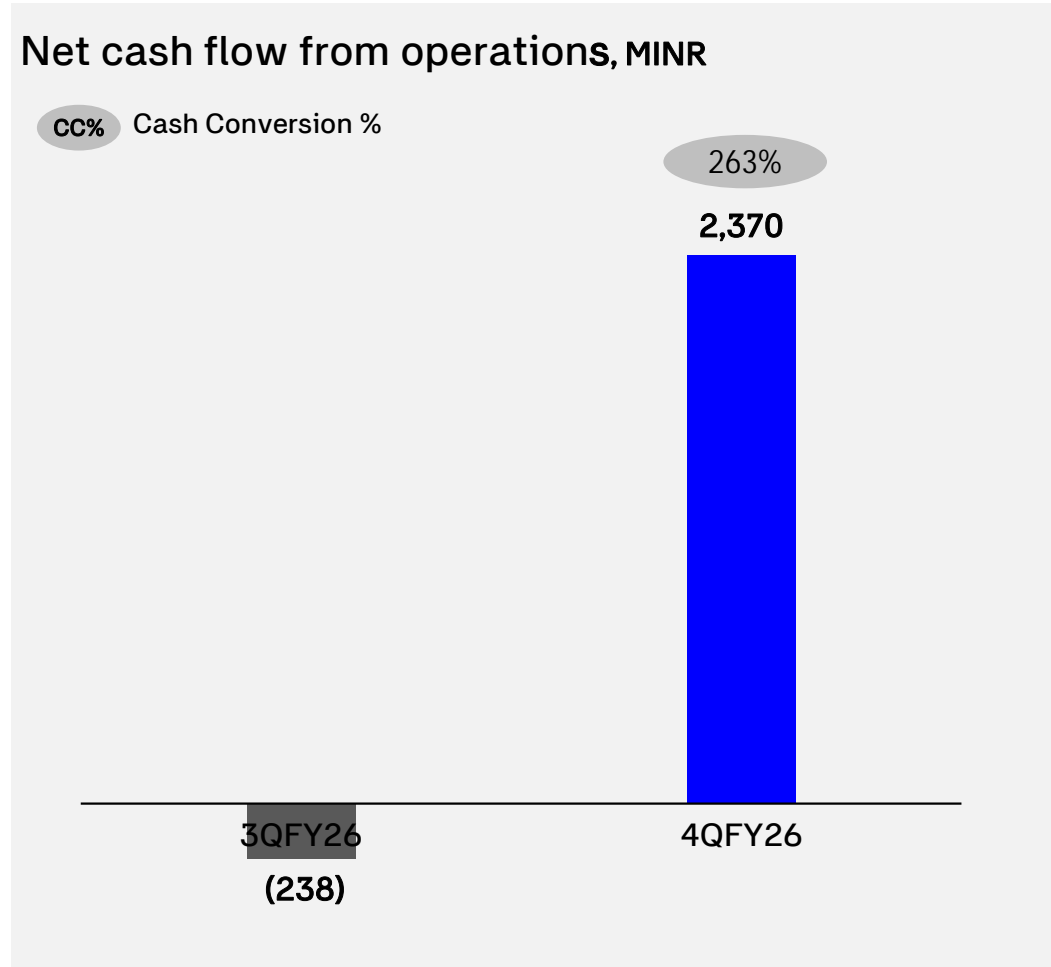


AP % of Net Sales





# Cash Flow | Improved significantly due to decline in NWC



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# Strategy & Success Stories



STRATEGIC PRIORITIES TO 2028

# ACES STRATEGY



## A

**Accelerate localization**

- Higher volume growth of localized products



## C

**Commercial Excellence**

- Enhanced customer centricity
- Innovation for growth



## E

**Execution**

- High performance teams



## S

**Single SKF**

- Collaborate for success



# Tractor business: Won 4 Projects worth ₹325 MINR

## Background:

- One of the biggest tractor OEMs expanding India facility to become a global manufacturing hub

## SKF Industrial Actions & Offering:

- SKF created a set of customer-specific offerings, including TRBs and CRBs
- Involved from platform design stage
- Supplied from SKF's Pune and Ahmedabad new channels

## Benefit for customer:

- One stop solution for their bearing need from reliable source
- All bearings from India origin creating cost and logistic advantage





# Local Commuter Trains: Development of TBUs ~₹30MINR/yr

## Customer Requirement

- Suburban train load increasing from 18 tons to 21 tons
- Maintenance Interval required: 1.2 MKm

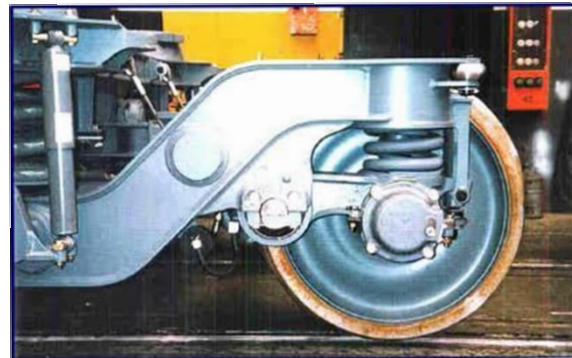
## SKF Solution

- Unitized Solution - Bearings + AB + Seal
- Bigger roller size & thicker Rings



## Value Proposition

- Compact solution with higher load capacity
- Extended service life & improved reliability
- Possibility to extend solution from 130kmph to 180Kmph trains (Vande Bharat)



**SKF**

## TRB capacity addition in Pune to grow business in Agricultural, Off-highway, After-market + Export to EMEA



### Adoption of cutting-edge Technology and process optimization :

- Installed high-speed machines
- Significant productivity improvement (less manning)
- Utilities and abrasive cost reduction by layout and process optimization

### Impact

- Capacity Addition 110–165 MM OD : **600T pcs to 880 Tpcs**
- Cost reduction > **18%**
- Flexibility through resetting time reduction > **20%**
- New Product Development lead time reduction > **35%**

**SKF**

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**Q&A**



ANTI-FRICTION

**SKIF**