



Date: 28.08.2026

BSE Limited

Phiroze Jeejeebhoy Towers,
Dalal Street, Fort,
Mumbai 400 001,
Maharashtra, India
Scrip Code: **544480**

National Stock Exchange of India Limited

Exchange Plaza, C-1, Block G,
Bandra Kurla Complex, Bandra (E),
Mumbai - 400 051
Maharashtra, India
Symbol: **JSWCEMENT**

Sub.: Investor Presentation

Ref.: Regulation 30 and other applicable provisions of the Securities Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, ("Listing Regulations")

Dear Sir/Madam,

Pursuant to Regulation 30 and other applicable provisions of the Listing Regulations, we enclose herewith an Investor Presentation.

The above information is also being hosted on the website of the Company at <https://www.jswcement.in/investor-presentation.php> .

Kindly take the same on record.

Yours sincerely,

For JSW Cement Limited

Sneha Bindra

Company Secretary and Compliance Officer

DESH KE LIYE.

DESH KE HAR GHAR KE LIYE.



Investor Presentation

August 2026

JSW Cement

Forward Looking and Cautionary Statement

This presentation contains forward-looking statements within the meaning of applicable securities laws. These statements are based on management's current expectations and assumptions, and are subject to risks and uncertainties that could cause actual results to differ materially. Forward-looking statements include, but are not limited to, projections of financial performance, business strategy, capital expenditures, market conditions, regulatory developments, and other factors affecting the cement industry. Words such as "anticipates," "believes," "estimates," "expects," "intends," "plans," "projects," "will," "would," "could," "may," and similar expressions are intended to identify forward-looking statements. These statements reflect management's views as of the date of this presentation and are not guarantees of future performance.

Investors are cautioned not to place undue reliance on these forward-looking statements. Actual results may differ materially due to factors such as changes in demand for cement, fluctuations in raw material and energy prices, competition, regulatory changes, environmental considerations, and other risks detailed in the company's filings with the Securities and Exchange Board of India (SEBI) and other regulatory authorities. The company does not undertake any obligation to update or revise any forward-looking statements, except as required by law.

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Amongst India's leading Conglomerates with a turnover of US\$25 Bn⁽¹⁾

JSW Steel

- India's largest steel producer with capacity of 33.4 MTPA⁽²⁾
- Growing to 50.3 MTPA by FY30 and 63.5 MTPA⁽²⁾ by FY32
- Market Cap of ~US\$ 33.4bn

JSW Energy

- Power producer with 14.54 GW installed generation capacity
- Targeting 30 GW generation and 40 GWh of energy storage capacity by 2030
- Market Cap of ~US\$ 11.1bn

JSW Infrastructure

- India's 2nd largest Private Ports operator & Fast growing Logistics Platform
- 186 MTPA ports capacity, growing to 400 MTPA by 2030
- Market Cap of ~US\$ 8.3bn

JSW Cement

- Capacity of 24.1 MTPA, growing to ~43 MTPA and developing a pan-India presence
- Lowest CO₂ emission intensity in the cement industry
- Market cap of ~US\$ 1.9bn

JSW PAINTS

- Premium presence in decorative segment with global brand 'Dulux'
- Leadership in industrial coatings across Coil, Automotive, Marine, Protective & Packaging segments
- Aim to be top 3 paint company in India; targeting 800,000 KLPA capacity by FY31

JSW Mobility

- 35% stake in JSW MG Motor India, 2nd largest EV passenger vehicle seller in India
- Plan to build India's largest NEV (New Energy Vehicle) complex
- Targeting 360k of PV and 100k of CV capacity by 2030

JSW ONE

- One of India's leading integrated B2B e-commerce platforms
- Offers building material products, logistics and credit solutions
- Achieved ₹18,596 Cr GMV in FY26, and EBITDA profitability in Q4 FY26

Other Business lines



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About JSW Cement

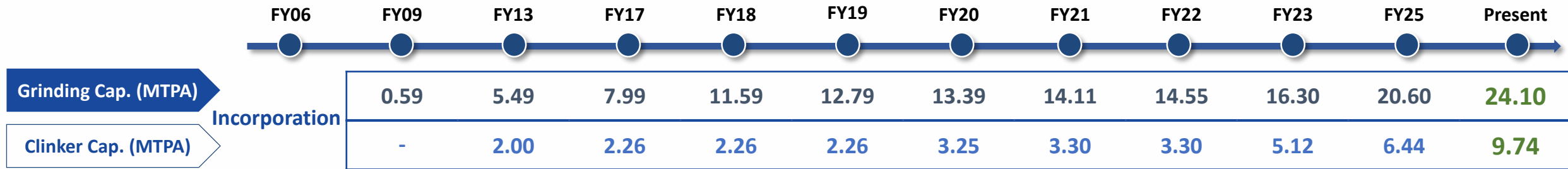


Nandyal Integrated Unit

JSW Cement: Snapshot⁽¹⁾



	1	Scaled Capacity with Multi-Region Footprint	24.10 MTPA Grinding Capacity across 8 Units	9.74 MTPA Clinker Capacity across 4 Units	South, West, East & North India & UAE Geographic Presence
	2	Among India's Fastest Growing Cement Manufacturers	14.7% ⁽²⁾ Grinding Capacity CAGR	14.2% ⁽²⁾ Sales Volume CAGR	15.6% ⁽²⁾ Operating EBITDA CAGR
	3	Integrated Manufacturing Set-up	BF Slag Long-term Contracts	Limestone 13 mines, 1.3 bn+ MT reserves in Indian operations	Clinker Fully Self sufficient
	4	India's Single Largest Manufacturer of GGBS	5.78 MMT 41% GGBS % of Total Volume Sold	~84% ⁽³⁾ All-India GGBS Market Share	100% BF Slag Content Gives Strength and Durability to RMC
	5	Low CO₂ Emission Intensity and Sustainable Products	268 kg/ton Lowest in Indian industry	51% Clinker to Cement Ratio	77% Green Cementitious Products as % of Total Volume Sold
	6	Extensive Sales and Distribution Network	9,800+ Active Dealers	7,500+ Direct Customers	51% Trade Share in Cement
	7	Strong Corporate Lineage of JSW Group	Visionary Promoters One of India's leading Conglomerates	Group Synergies Raw material, Power, Logistics	JSW Brand Customer Loyalty + Trust



Phased Regional Market Entry

- FY 2009-12: South
- FY 2015: West
- FY 2018: East
- FY 2026: North



Efficient Scale-up led by Grinding Units

- FY 2017: South region Expansion
- FY 2018: West region expansion
- FY 2021: East region expansion



Full Backward Integration with Clinker Units

- FY 2013: Nandyal integrated unit (South)
- FY 2020: FZC clinker unit (West)
- FY 2023: Shiva clinker unit (East)



Strategic acquisitions to strengthen Limestone Reserves

- FY 2017: Shiva Cement (East region)
- FY 2023: SMPL Mine (Central region)

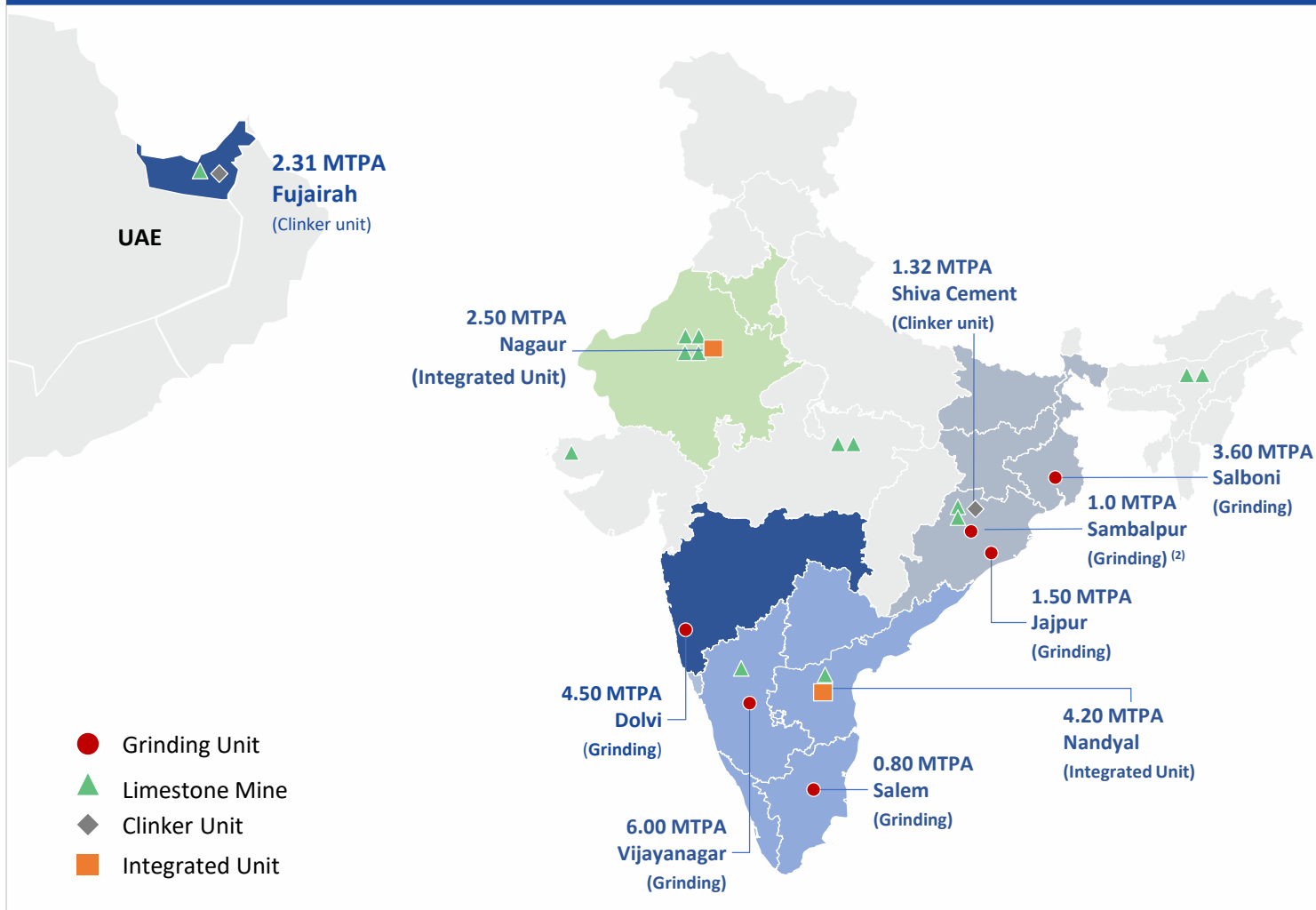


Prudent Capital Raising

- FY 2018: Rs 500 cr. Rights Issue by Promoters
- FY 2022: Rs 1,600 cr. PE investment
- FY 2026: Rs 1,600 cr. IPO primary issue

JSW Cement: Strategically Located Manufacturing Footprint

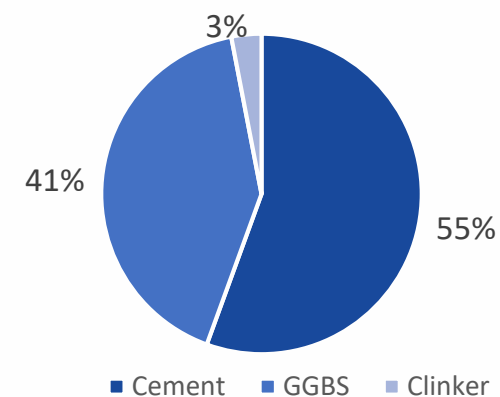
Manufacturing Footprint



Multi-regional presence (MTPA)

Region	Grinding Capacity	Clinker Capacity
South	11.00	2.81
West	4.50	2.31 ⁽¹⁾
East	6.10	1.32
North	2.50	3.30
Total	24.10	9.74

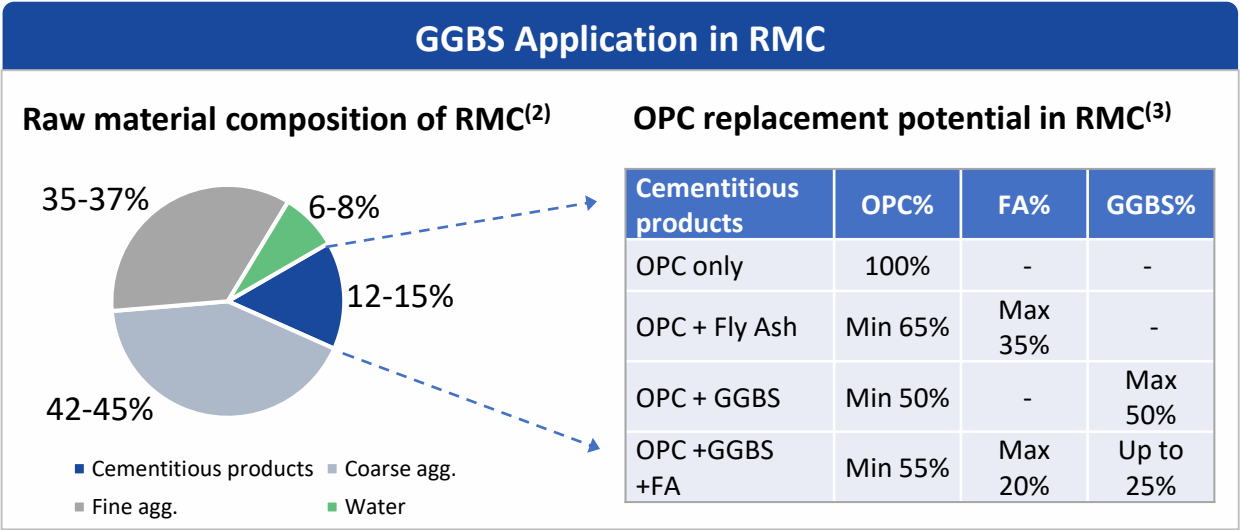
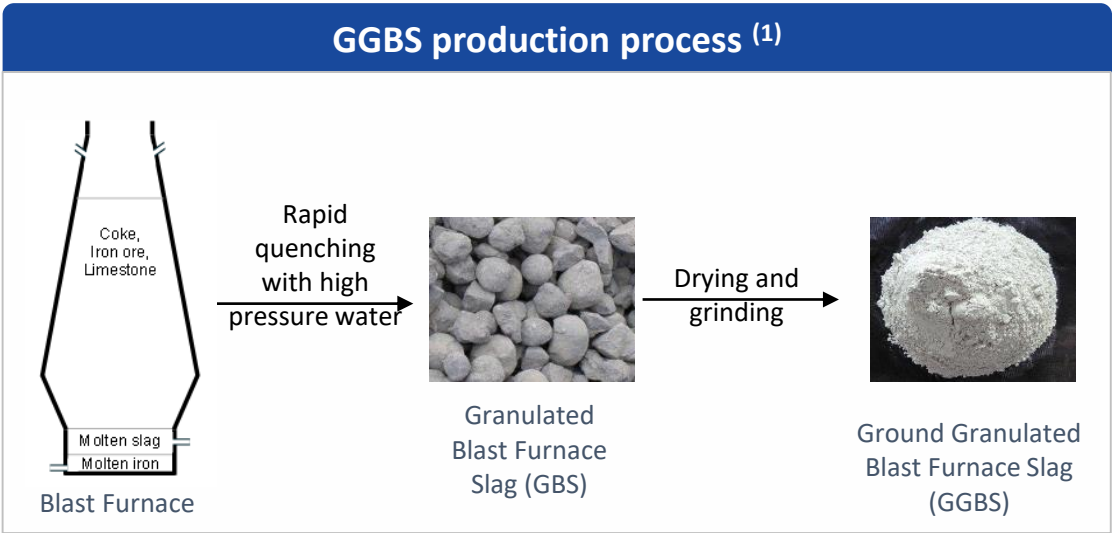
Diversified Product Mix (FY26)



(1) This capacity is part of JSW FZC which is a JV

(2) The grinding unit has been set up vide a commercial arrangement with Bhushan Power and Steel Limited, exclusively for use and consumption by Shiva Cement

JSW GGBS: Superior Cementitious Properties driving use in RMC sector



Advantages of using GGBS in RMC



Reduced thermal cracks due to low heat of hydration



Reduced shrinkage cracks



Improved workability & lowered water-cement ratio



Higher long-term compressive strength of concrete



Better resistance against chemicals



Higher flexural strength



Improved cohesion



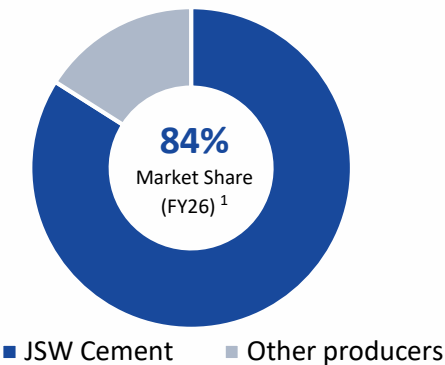
Improved durability & reduced life-cycle cost



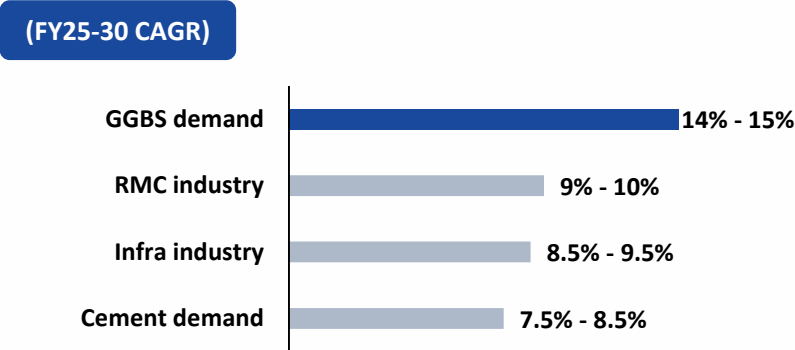
(1) Source: CRISIL (2) Composition shown by volume; in addition, additives/admixtures may also be added to RMC (3) As per BIS norms (June '24)

JSW Cement pioneered the GGBS business model in India and is established as the Market Leader in the domestic market

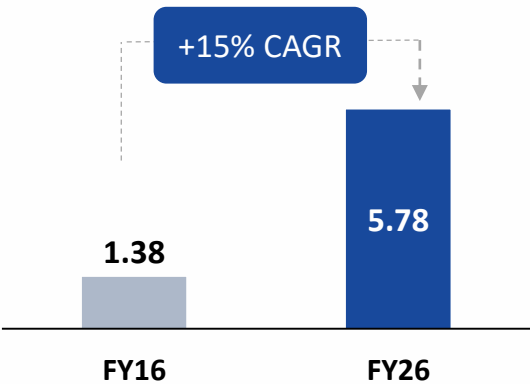
#1 GGBS Producer in India



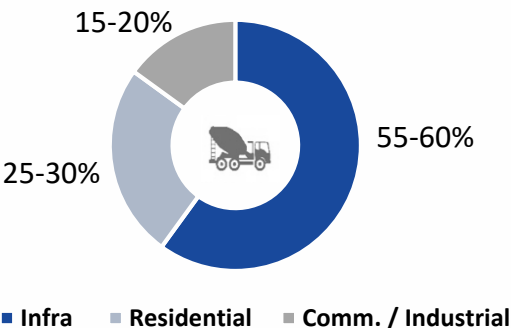
GGBS expected to grow faster than cement demand⁽²⁾



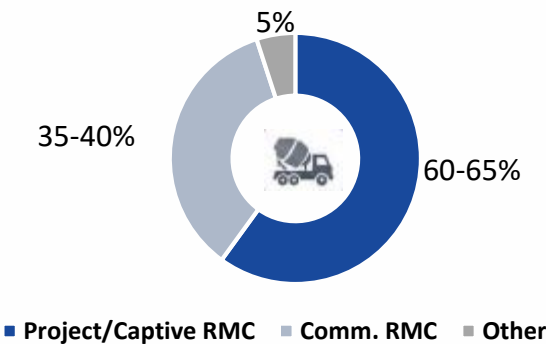
Track record of scaling up (Vol sold (Mn MT))



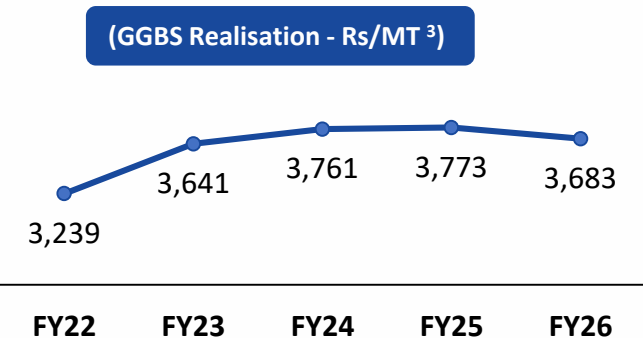
GGBS End-Use Segments⁽²⁾



GGBS application – Key Component of RMC⁽²⁾



Stable Pricing | Strong Margins | High Returns



(1) Source: Company Estimates (2) Source: Crisil (3) Realisation = Gross Selling Price less GST less Discount

Growth Enablers

- 1 Multi-year supply contracts**
Secured the slag output from JSW Steel plants in South & West India; similar contracts with JSW Steel and other steel producers in East India
- 2 Co-location with JSW Steel**
Grinding Units in South & West India co-located with JSW Steel plants, minimizing inward logistic costs of slag
- 3 Regulatory certifications in place**
From all relevant regulatory bodies, allowing GGBS usage in RMC for building roads, metro, airports, railway bridges etc.
- 4 R&D led new product launches**
Microfine GGBS with applications in precast and high performance concrete

Growth Strategies

- 1 Continue to increase number of customers**
Increase customer base within existing markets (Tier 1 cities)
Expand into newer areas, as RMC sector penetration increases in Tier 2 cities
- 2 Increase GGBS usage within existing customer base**
OPC replacement by GGBS within RMC is on uptrend; continuous customer education aiding the shift
- 3 Advisory & testing services**
Concrete testing labs offering concrete mix design, testing and investigation services
Techno-commercial team to advise customers about optimal GGBS usage

GGBS is Widely Adopted Across Major Customer Categories



Large EPC players



Commercial RMC Producers



Residential Developers



Govt. agencies (Infra projects)

JSW GGBS: Landmark Projects



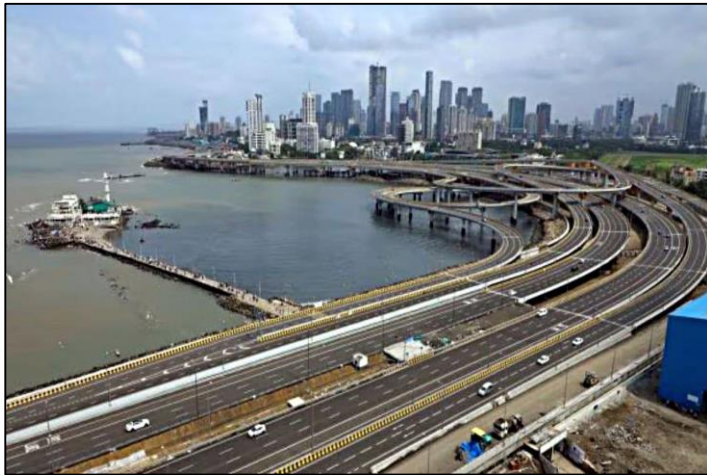
Mumbai Ahmedabad High Speed Rail



MTHL Atal Setu Mumbai



Bengaluru International Airport



Mumbai coastal road



L&T Daewoo- Patna Bridge



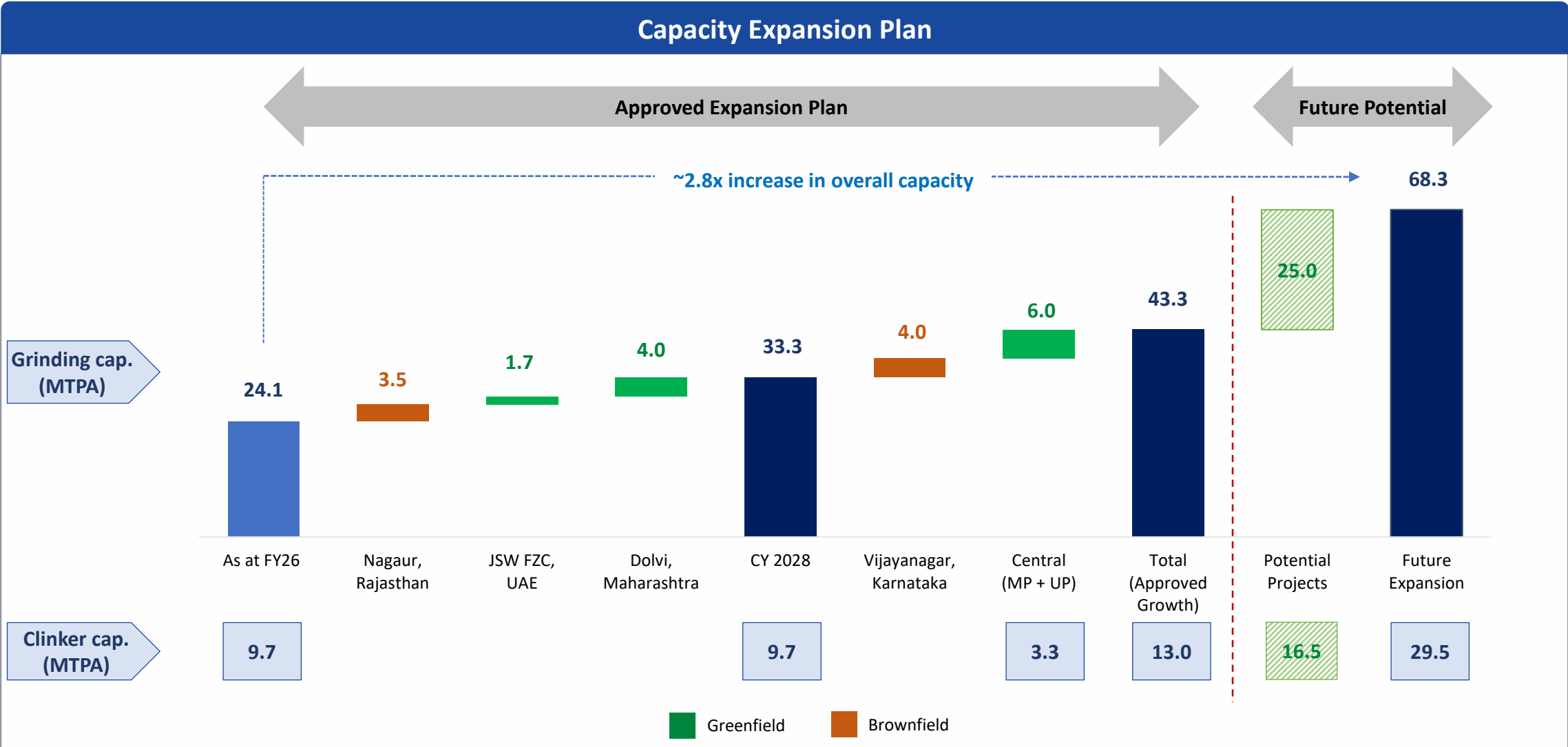
Paradip Port, Odisha

Growth Strategy

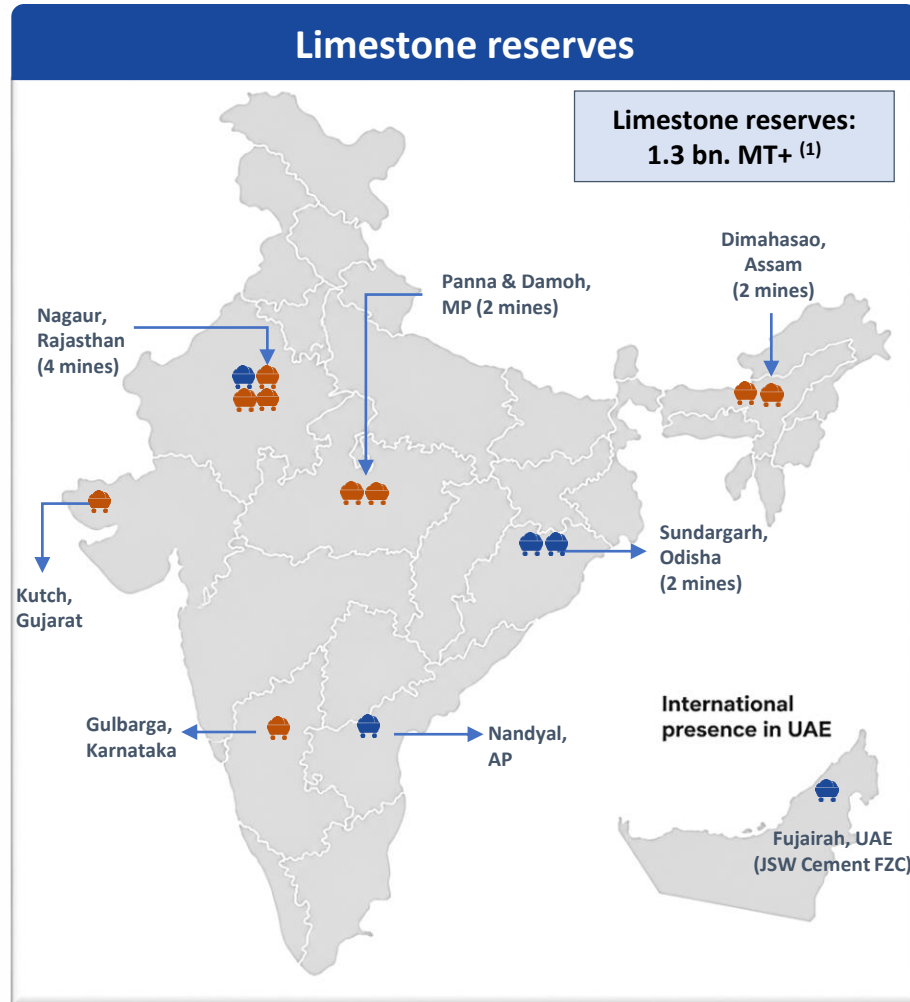


Dolvi Grinding Unit

JSW Cement: Road Map for Growth

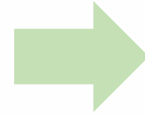


JSW Cement: Secured Resource Base to Underpin Future Growth



Mines supporting current plant network (5)

Mines supporting future expansion (9)



Potential Growth Options		Grinding Cap. (MTPA)	Clinker Cap. (MTPA)
Approved Expansion Plan	• Projects approved / under construction	43.3	13.0
	• North India (Phase 2 and 3): Two additional clinker lines of 3.3 MTPA each at Nagaur ⁽²⁾	10.0	6.6
Organic Growth Options	• Central India: 2 nd clinker line in MP	5.0	3.3
	• North East India: Assam	5.0	3.3
New Sites	• South/West India: Karnataka / west Maharashtra	5.0	3.3
Future Expansion		68.3	29.5

Key Project Updates: Nagaur Integrated Unit

Nagaur Integrated Unit

3.3 MTPA Clinker and 2.5 MTPA Cement Grinding

- OLBC works is in advance stage. Expected to start trials in Aug'26
- AFR co-processing system expected to be commissioned in Aug'26

WHRS

- STG has been synchronized with AQC boiler
- Synchronization with PH boiler is scheduled to be completed by Aug'26

1.0 MTPA Cement Grinding Unit

- Civil works completed. Structure and mechanical erection works are progressing well. Commissioning expected in Sep'26

2.5 MTPA Cement Grinding Unit

- Engineering works is progressing as per the plan
- Mill package has been awarded to M/s Loesche



Nagaur IU – OLBC



Nagaur IU – Cement Grinding and Packing & Dispatch

Fujairah, UAE

1.65 MTPA Cement Grinding Unit

- Approval of land lease agreement is completed
- EIA approval and Environment permit is completed

Mansa - Punjab

2.75 MTPA Cement Grinding Unit

- Final approval for wild life conservation plan has been granted
- EC approval is being pursued
- Detail engineering of major structures is progressing well

Nandyal Integrated Unit

Chlorine Bypass System

- Proposed system will allow the plant to increase the Thermal Substitution Rate to ~25% by end FY27
- Majority of materials have reached at site
- Civil works 60% completed and fabrication works 75% completed



Nandyal IU: Chlorine Bypass - Baghouse and MCC Room

Key Project Updates: Renewable Energy

Wind Capacity added in Q1 FY27

Dolvi Grinding Unit

- Wind capacity of 32 MW capacity installed for Dolvi Unit
- Power generation started from May'26

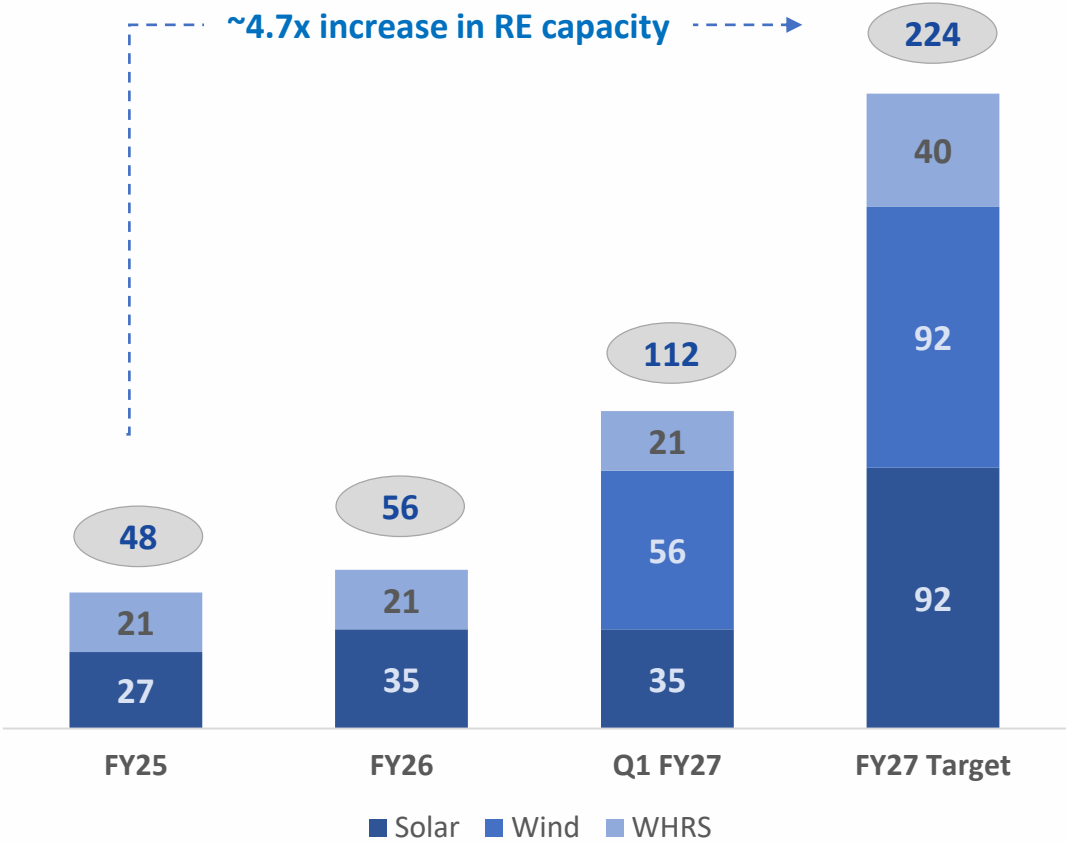
Vijayanagar Grinding Unit

- Wind capacity of 24 MW capacity installed for Vijayanagar Unit
- Power generation started from April'26



Wind capacity at Vijayanagar plant

Green Power Capacity (MW)



Financial Performance: Q1 2027

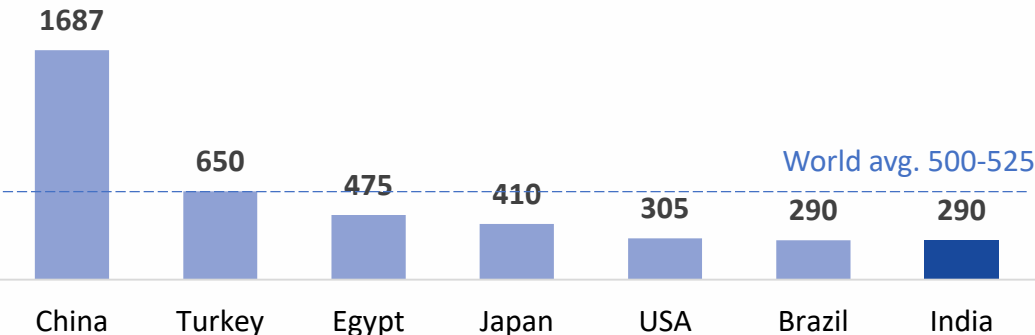


Vijayanagar Grinding Unit

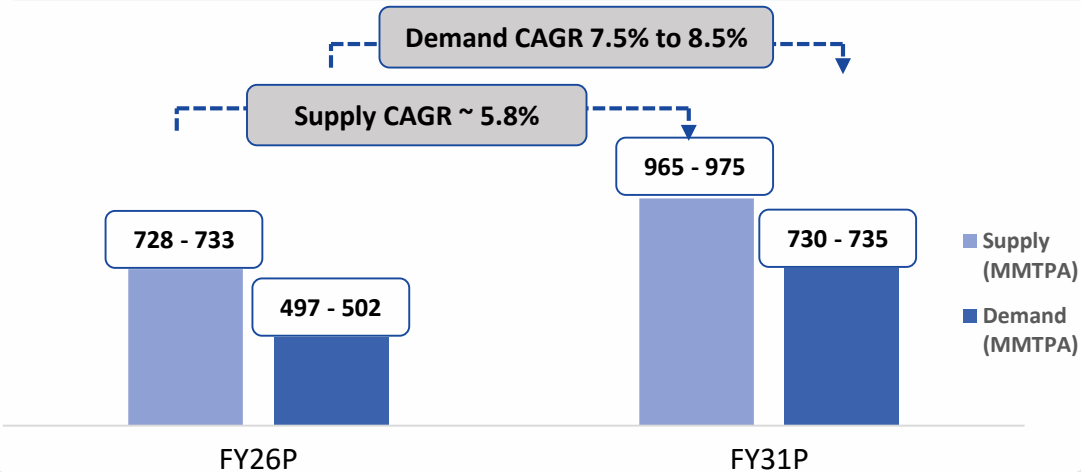
Cement Sector Overview

India is the 2nd largest cement consuming economy in the world, but per capita consumption remains low

2025 Per Capita Cement Consumption (kg)

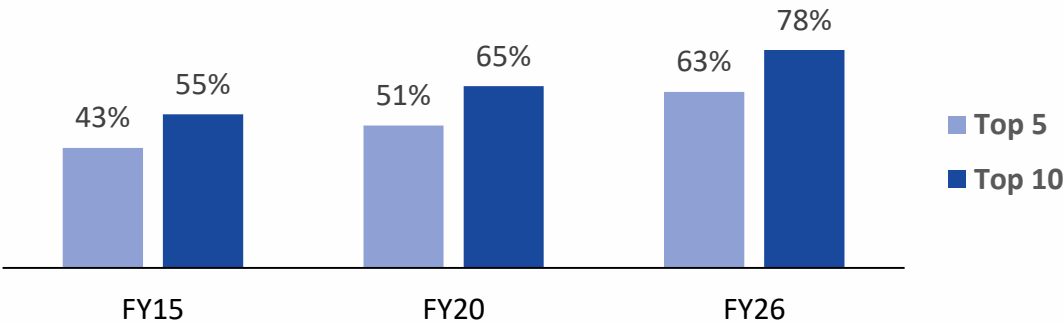


Cement demand growth to outpace capacity additions

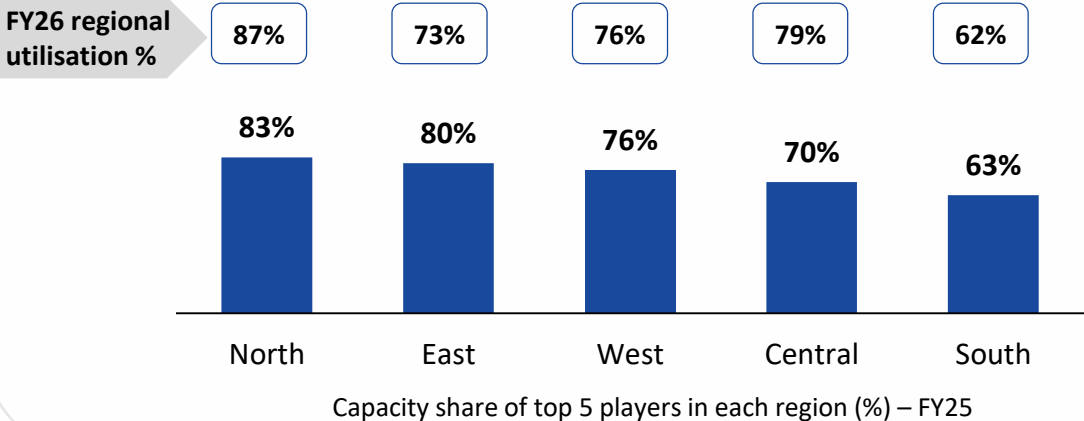


Cement industry continues to consolidate

Capacity share of top players (%) – all India



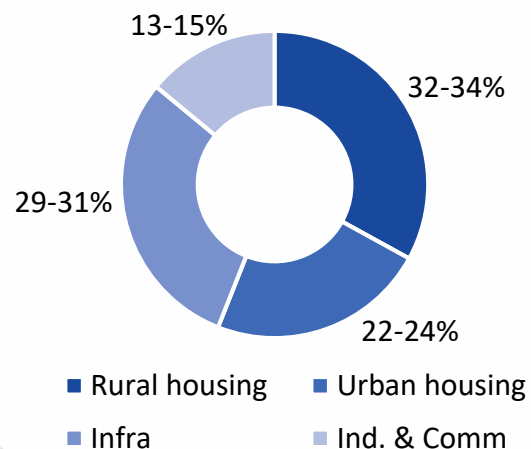
Regional Variations in Market Structure & Utilisation Levels



Cement Sector Outlook

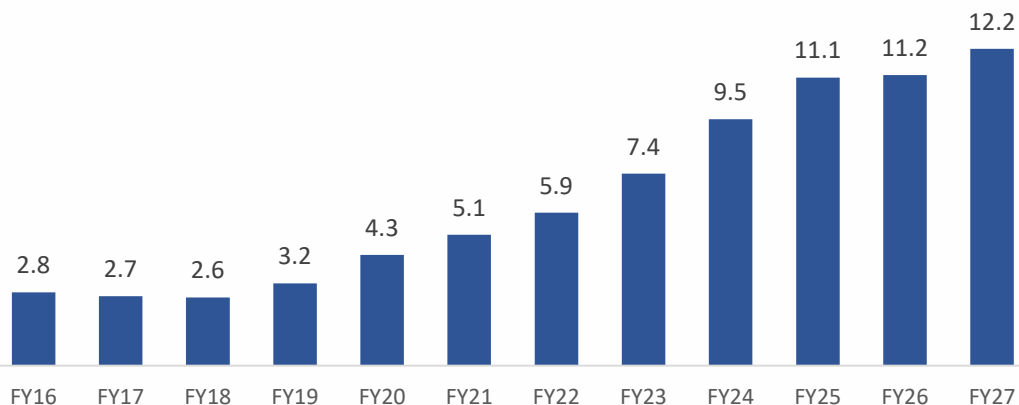
India's Infrastructure Boom: A Cement Consumption Catalyst

Broad based demand growth expected across segments



Segment	Demand CAGR (FY26-31P)
Rural housing	7.5-8.5%
Urban housing	5.5-6.5%
Infrastructure	8.5-9.5%
Industrial & Comm.	7.0-8.0%

Infra Capital Expenditure (₹ Trillion)



Flagship Govt. Programmes driving Cement Consumption



Pradhan Mantri Awas Yojana (Rural & Urban)

"Housing for All" - a flagship government initiative providing affordable, permanent housing with financial assistance to underprivileged & middle-income families



PM GatiShakti NMP

Expanding logistics infrastructure including freight corridors, industrial smart cities, multi-modal logistics hubs



Bharatmala

Expressways, economic corridors and border infrastructure to drive cement demand across concrete pavements, bridges, flyovers & grade separators



Sagarmala

Port modernization & establishment of Coastal Economic Zones including deep-water berths, breakwaters, dry ports & coastal infrastructure



Rail Mobility

Railway budget increased to ₹2.78 lakh crore in FY27; high speed rail corridors planned; railway station redevelopment; network modernisation



Metro and Airports

Metro network expanded to 1,155 km+ in 26 cities; UDAN scheme aims to add 100 new airports & 200 helipads to strengthen last-mile regional air connectivity

Q1 FY27: Key Highlights



Operational Updates

- Total Volume Sold: 3.81 million MT, increased by 15.0% YoY
 - Cement Volume Sold: 2.34 million MT, increased by 26.5% YoY
 - GGBS Volume Sold: 1.33 million MT, increased by 2.6% YoY
- Cement realization increased by 6.0% QoQ; GGBS realization increased by 3.4% on QoQ basis
- Cement Trade ratio of 51%; Clinker factor of 55%



Financial Performance

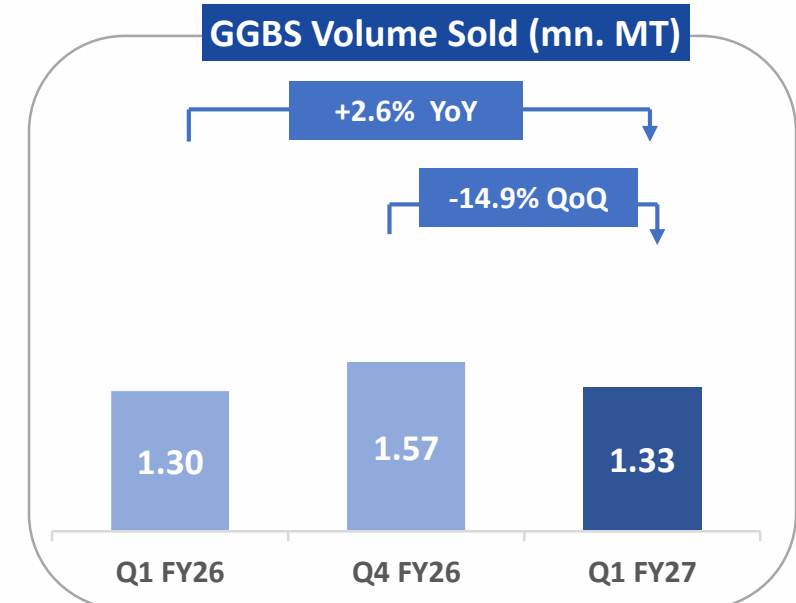
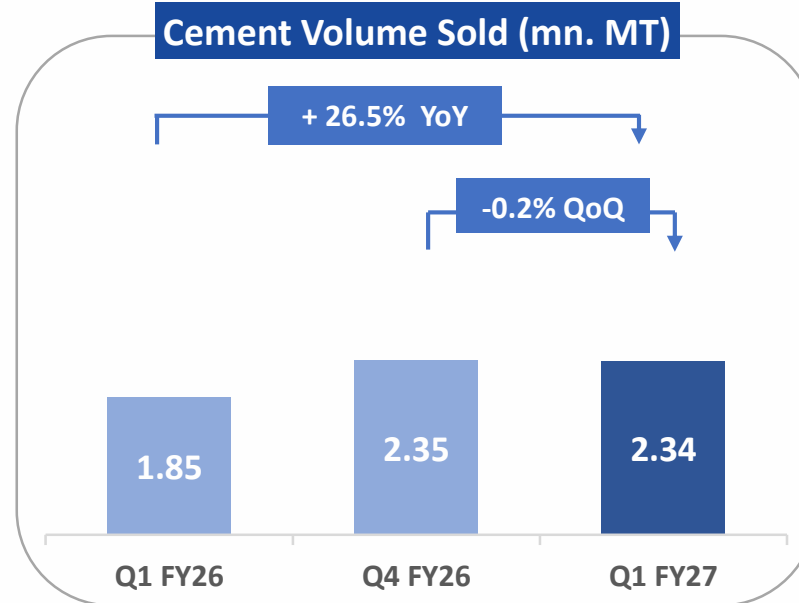
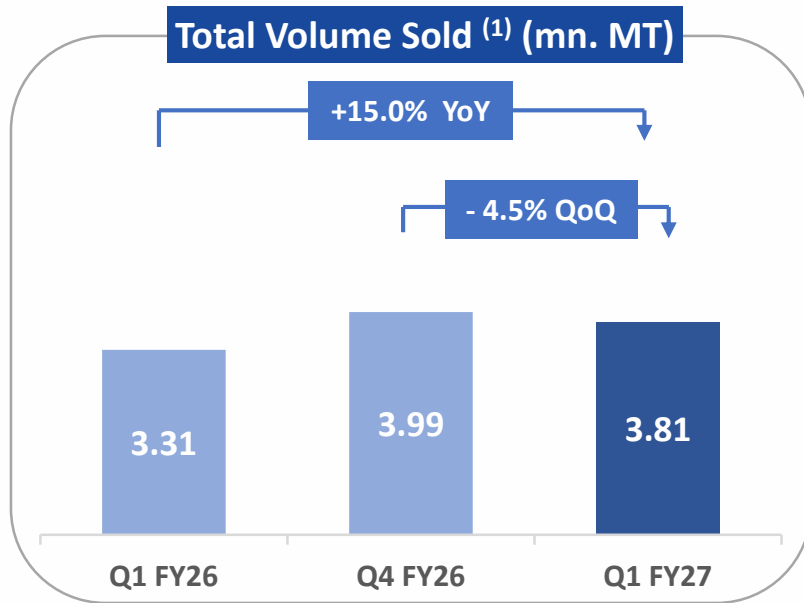
- Revenue from Operations: ₹ 1,896.4 crore, increased by 21.6% YoY
- Operating EBITDA slipped by 7.5% YoY to ₹ 298.6 crore, equating to ₹ 784/MT
- Operating EBITDA (excluding North operations) increased by 4% YoY to ₹336 crore, equating to ₹979/MT
- PAT of ₹ 153.4 crore
- Net Debt ₹ 3,856 crore; Net Debt to TTM EBITDA of 2.95x as at Jun 30, 2026



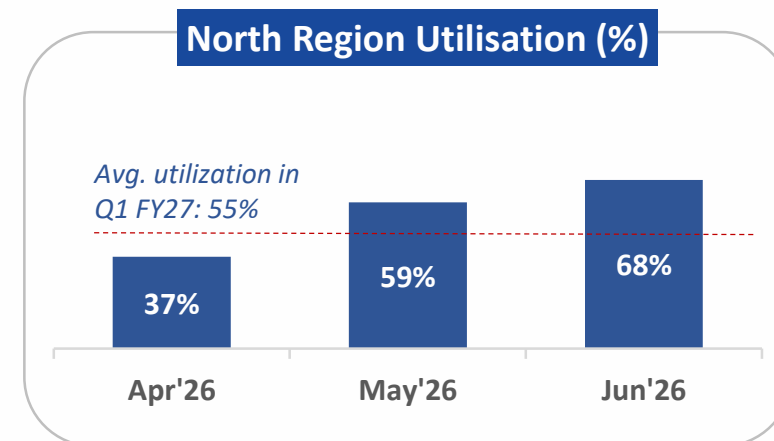
Other Highlights

- JSW Cement's long-term credit rating was upgraded to IND AA- from IND A+ with a "Stable" outlook, by India Ratings and Research
- During the quarter, Company added 56 MW of Wind capacity, taking the total renewable power capacity to 112 MW
- Vijayanagar Plant was awarded the "GOLD AWARD" at the Green Enviro Environment Award & Summit, for outstanding achievement in "Environment Excellence"

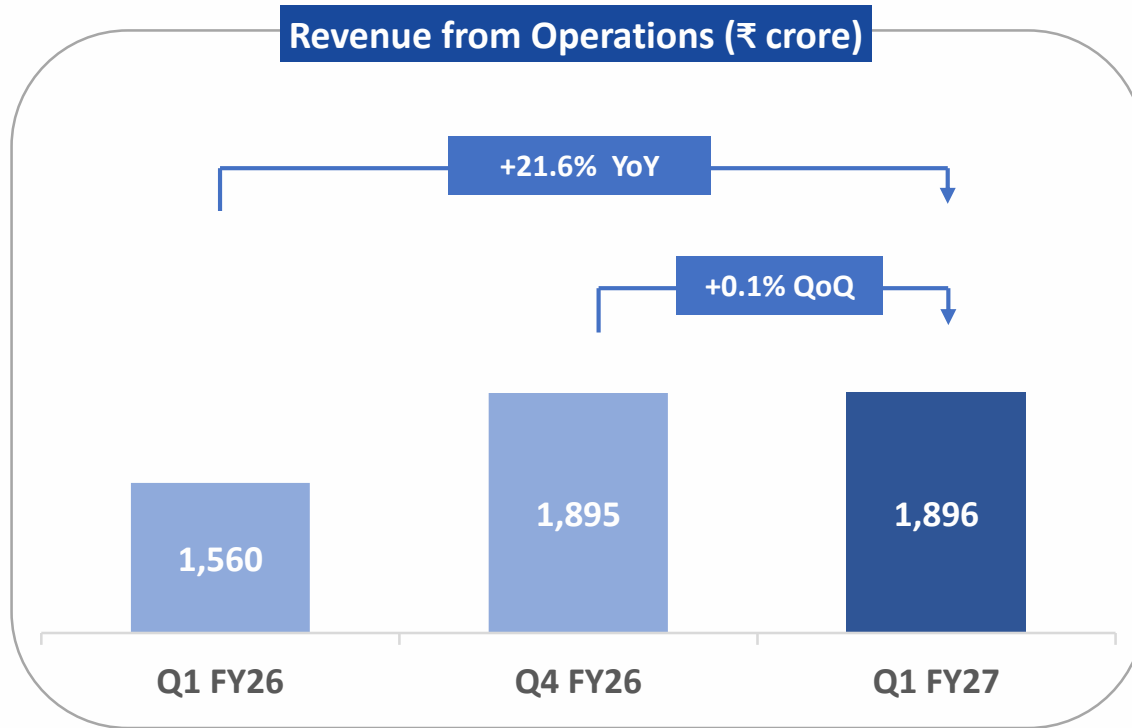
Quarterly Sales Volume



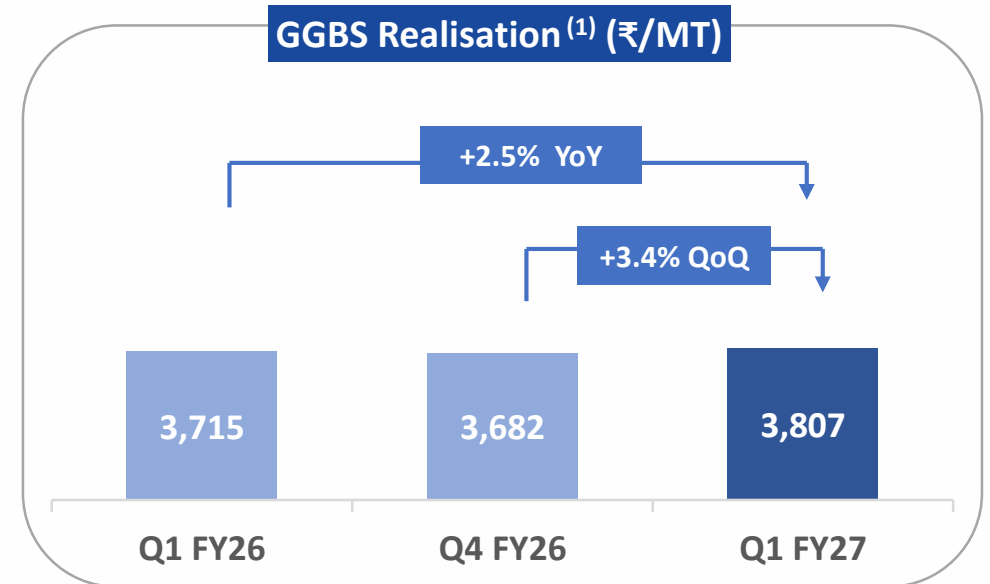
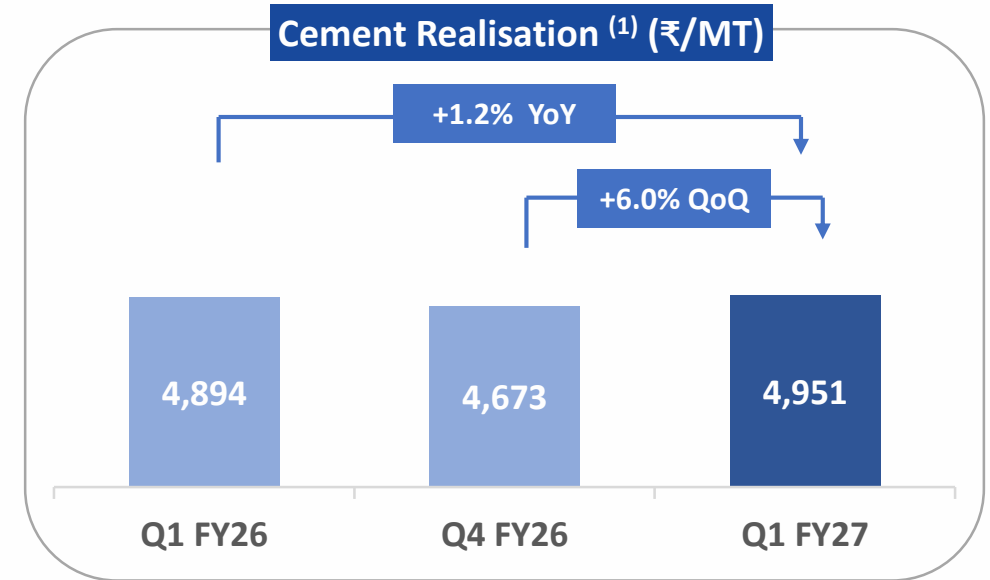
- Total sales volume increased by 15.0% on YoY basis and reduced by 4.5% as compared with sequential quarter
- Sales volume growth YoY was underpinned by momentum in cement volumes in existing regions, as well as robust ramp up of North operations
- Cement Trade ratio: 51%, Blended cement ratio: 63%



Quarterly Revenue from Operations

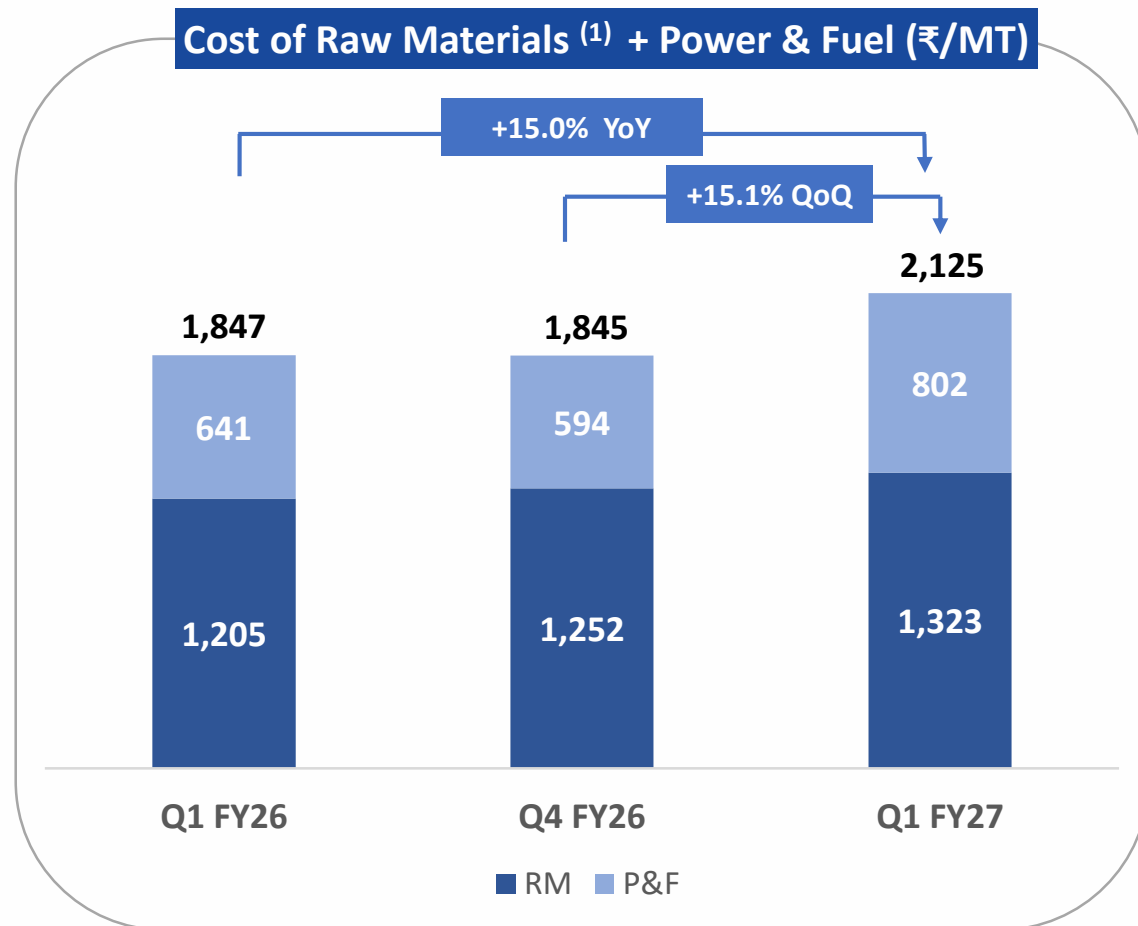


- Revenues increased by 21.6% YoY, driven by volume increase in Cement, improved realisation across products, as well as increased RMC revenues
- Cement realisation increased by 6.0% QoQ; GGBS realisation increased by 3.4% on QoQ basis

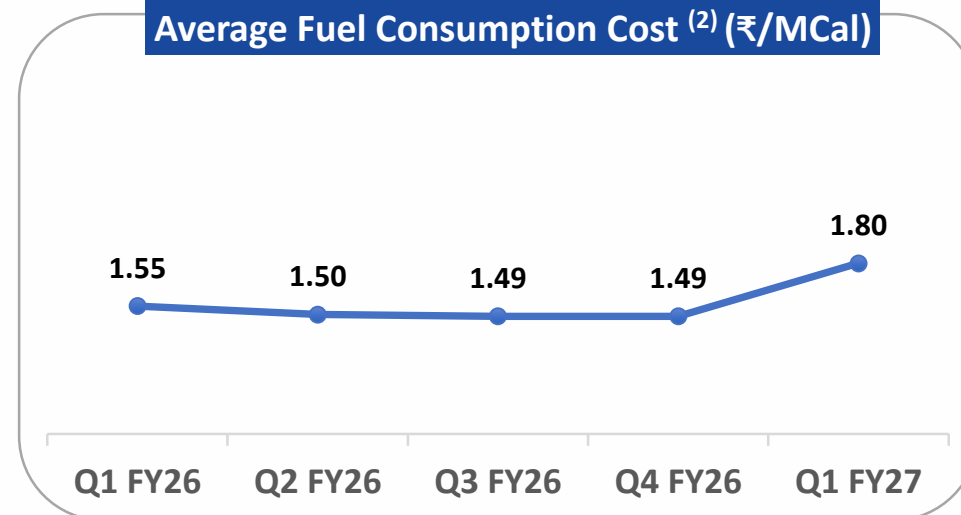


Quarterly Raw Material, Power & Fuel Costs

Cost of Raw Materials ⁽¹⁾ + Power & Fuel (₹/MT)

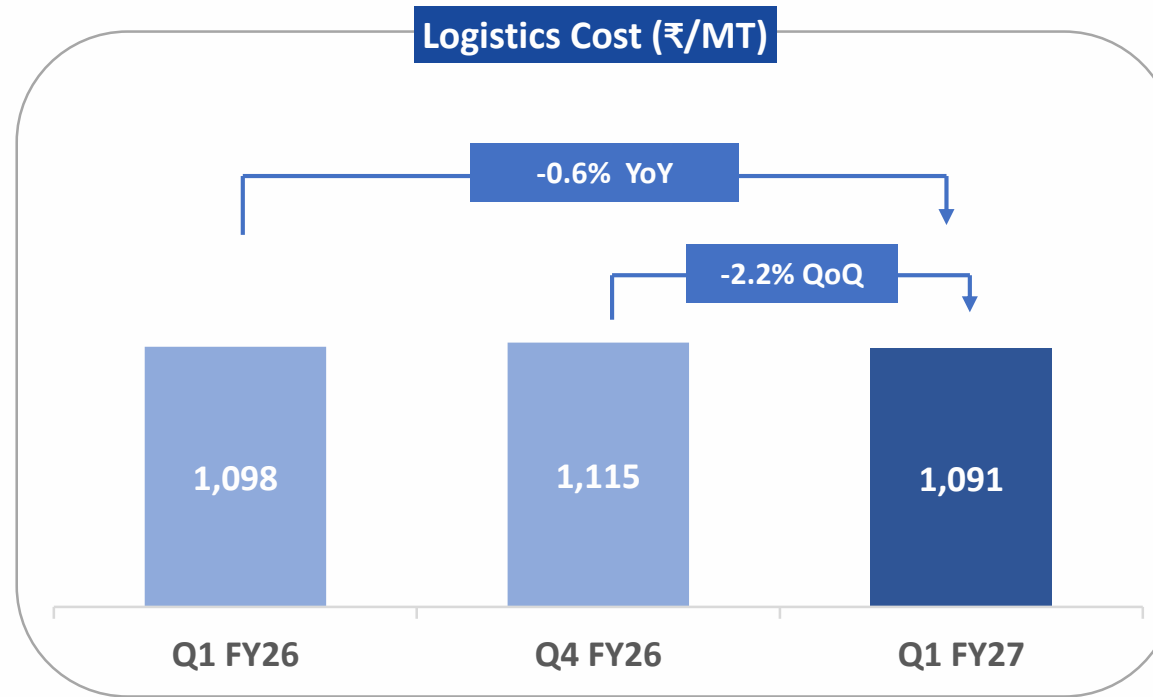


Average Fuel Consumption Cost ⁽²⁾ (₹/MCal)



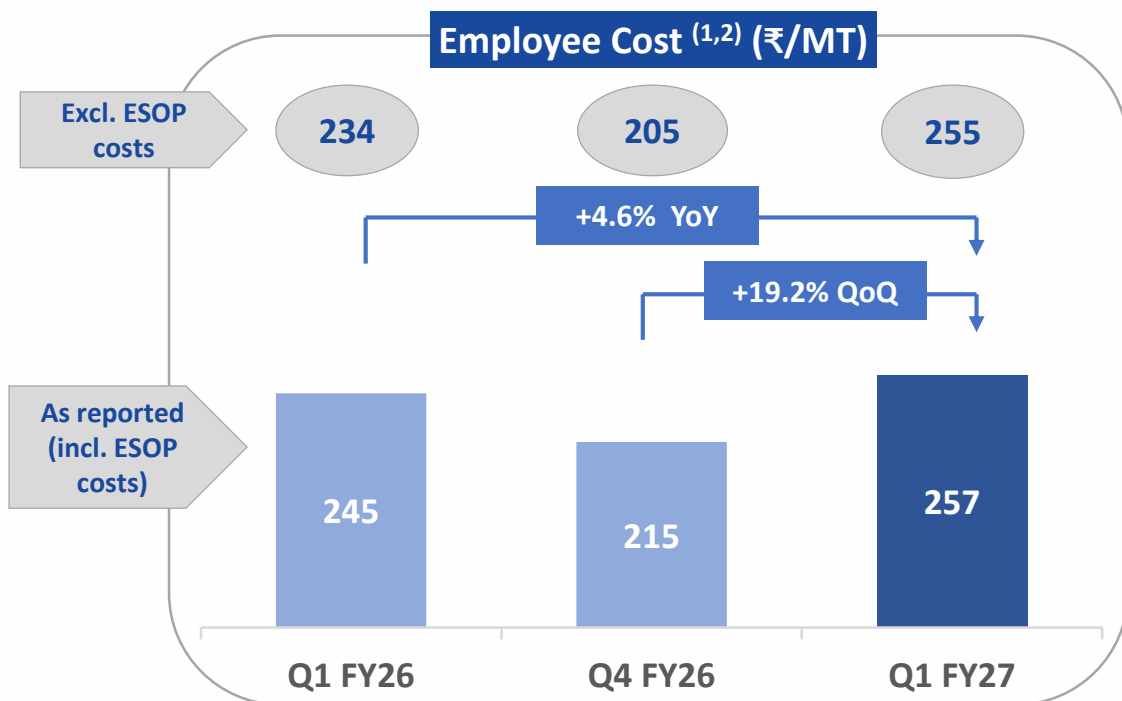
- Combined cost of inputs increased on YoY basis, with reduction in certain raw material costs, offset by higher fuel cost, impact of Nagaur operations and higher raw material cost in the RMC business
- Combined cost of inputs increased on QoQ basis, driven mainly due to higher fuel cost and impact of Nagaur operations
- Share of Green power increased from ~25% in Q4 FY26 to ~30% in Q1 FY27

Quarterly Logistics Cost

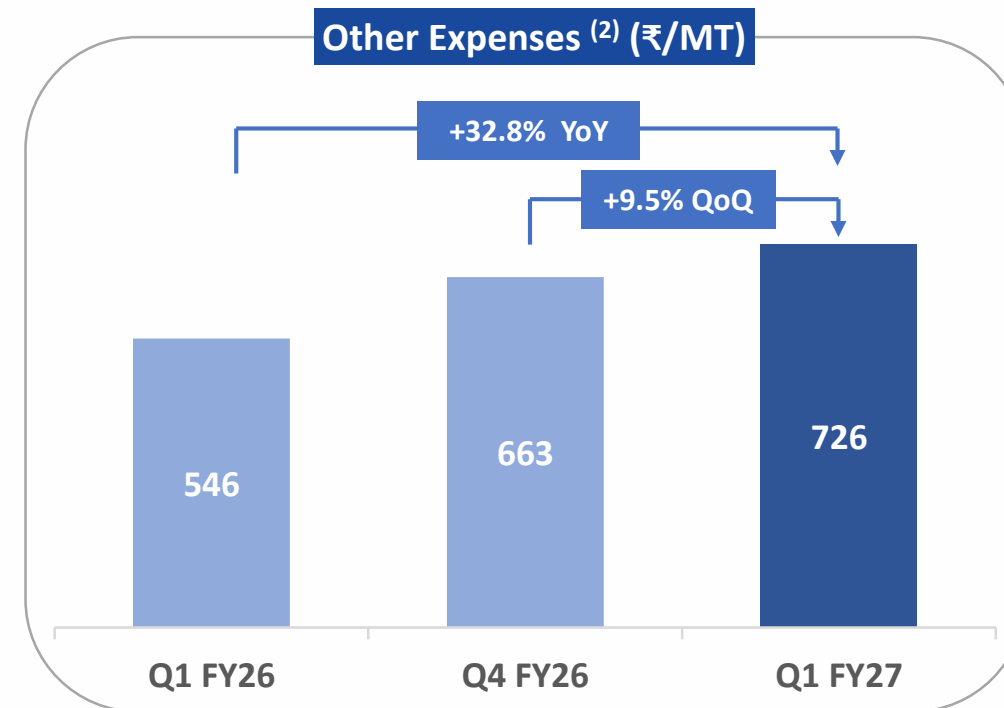


- Logistics cost per ton reduced by 0.6% YoY and by 2.2% on QoQ basis
 - Cost decreased YoY basis with savings from logistics efficiencies and improved direct dispatch ratio offset by slightly increased lead distance and higher diesel costs
 - Cost decreased QoQ driven mainly by reduction in lead distance and logistics efficiencies
- Lead distance: Q1 FY26 283 km, Q4 FY26 289 km, Q1 FY27 285 km

Quarterly Employee Cost and Other Expenses

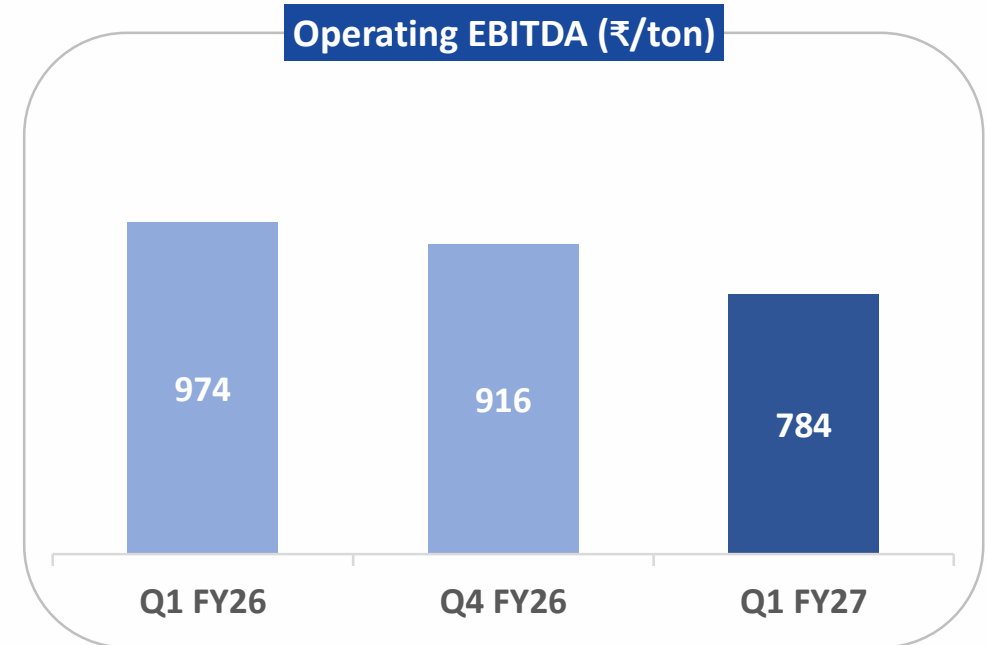
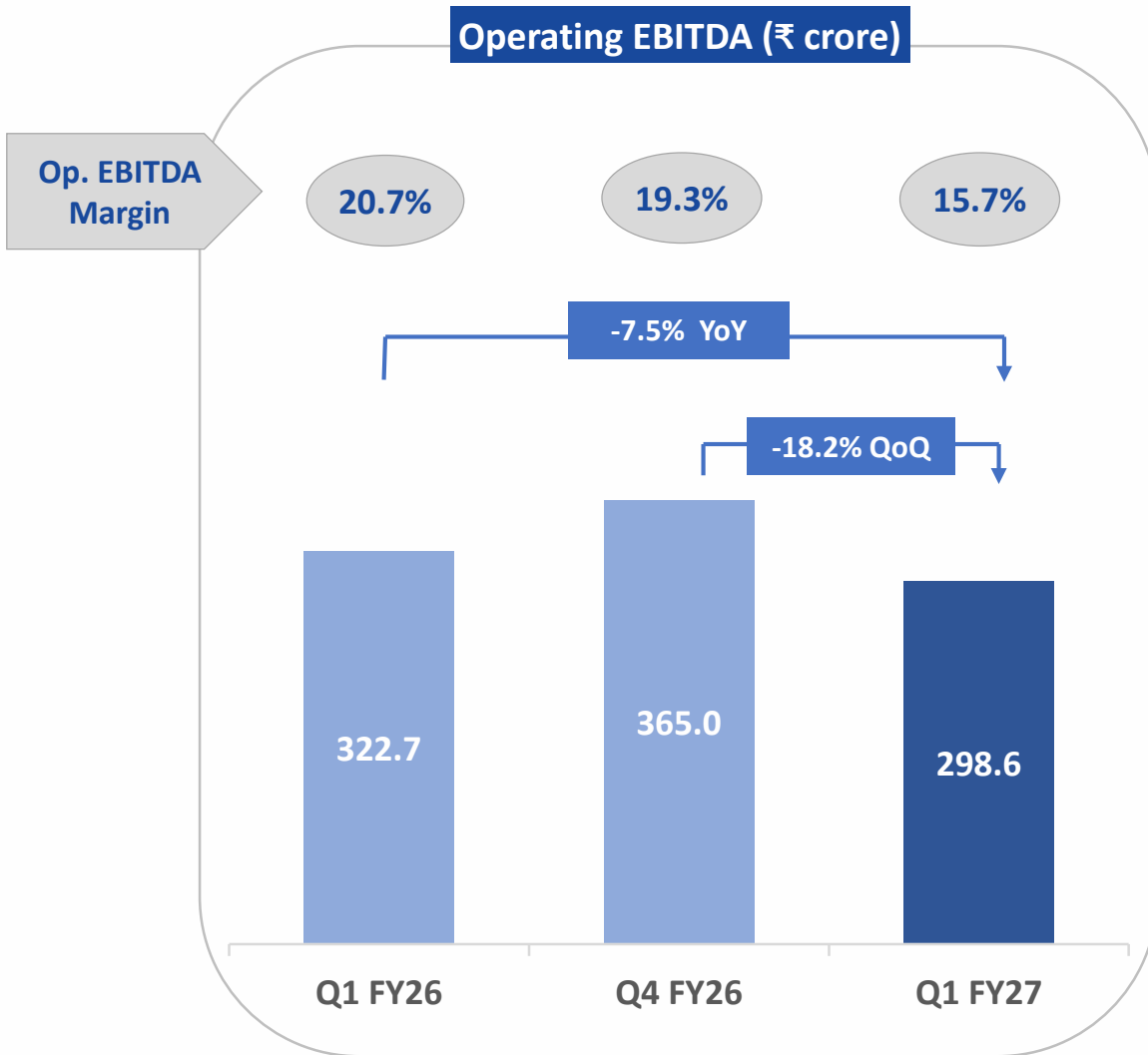


- Excluding ESOP costs, Employee Costs per ton were higher YoY, due to impact of annual increments as well as increased headcount in North
- Excluding ESOP costs, Employee Costs per ton increased QoQ, due to impact of increments, North operations and volume impact



- Increase on YoY basis is primarily due to marketing expenditure for North operations as well as higher packing and maintenance costs
- Increase on QoQ basis, due to higher marketing expenditure for North operations and volume impact

Quarterly Operating EBITDA



- Operating EBITDA per ton decreased on YoY basis due to higher Power & Fuel and Other expenses, which were partially offset by increased realisation
- Operating EBITDA per ton decreased on QoQ basis, primarily driven by higher Power and Fuel costs
- Q1 FY27 Operating EBITDA (*excluding North Operations*) of ₹336 crores, equating to ₹ 979/MT

Summary Income Statement

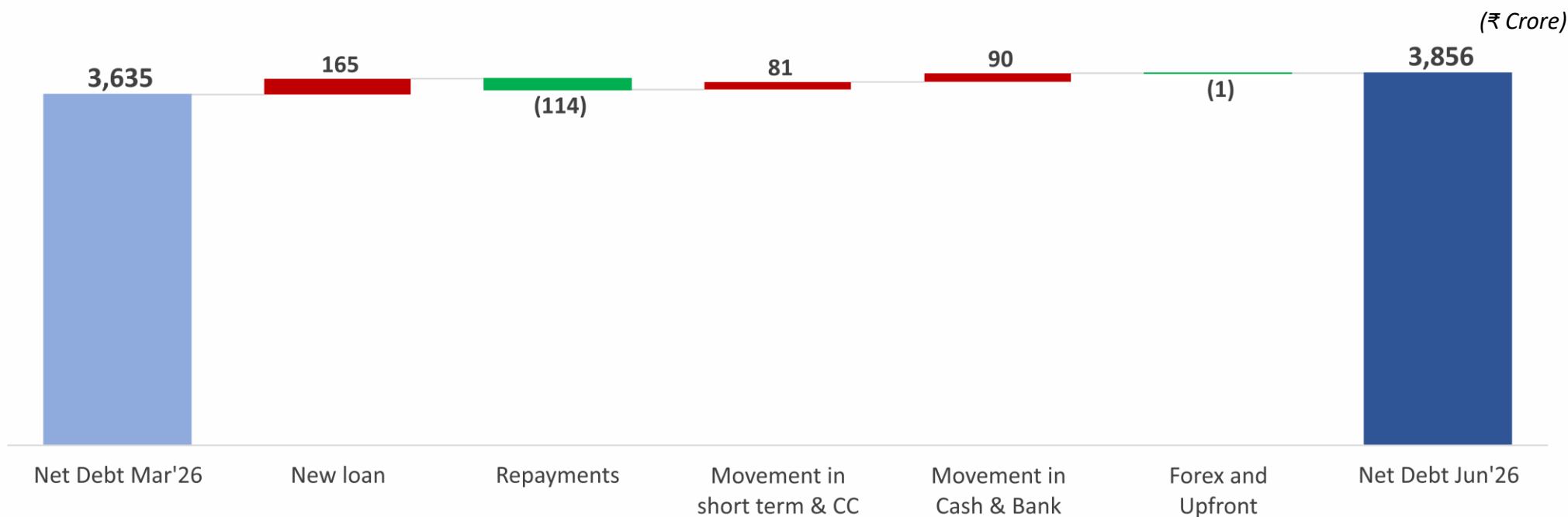
FY25	FY26	Variance (% YoY)	Particulars (₹ Crores)	Q1 FY26	Q1 FY27	Variance (% YoY)
5,813.1	6,512.5	12.0%	Revenue	1,559.8	1,896.4	21.6%
4,948.9	5,272.2	6.5%	Less: Operating Expenses	(1,237.2)	(1,597.9)	29.2%
864.2	1,240.3	43.6%	Operating EBITDA	322.7	298.6	(7.5)%
101.6	152.4	50.0%	Other Income	22.1	73.8	234.6%
965.8	1,392.7	44.2%	Total EBITDA	344.7	372.3	8.0%
(310.3)	(322.2)	3.8%	Less: Depreciation	(77.9)	(97.5)	25.2%
(450.2)	(378.0)	(16.0%)	Less: Finance Costs	(102.2)	(97.4)	(4.7)%
(150.5)	-		Less: Fair Valuation of Financial instruments	-	-	
(98.5)	30.8		Share of Profit /(Loss) from JV	0.1	12.7	
(43.6)	723.2		PBT (before exceptional items)	164.7	190.2	15.4%
-	(1,504.5) ⁽¹⁾		Less: Exceptional items ⁽¹⁾	(1,466.4) ⁽²⁾	-	
(43.6)	(781.2)		PBT	(1,301.6)	190.2	
120.1	17.6		Tax expense	(64.8)	(36.7)	
(163.8)	(798.8)		Profit After Tax	(1,366.4)	153.4	
(13.3)	667.6		Adjusted Profit After Tax ⁽³⁾	100.0	153.4	

(1) For FY 26: Exceptional items include Impact of Labour code ₹ 27.1 crore, ECL on incentives ₹ 11.0 crore and ₹1,466.4 crores arising from the conversion of financial instruments (CCPS) designated as FVTPL into Equity Shares prior to the IPO of the company.

(2) For Q1 FY26: Exceptional items include ₹1,466.4 crores arising from the conversion of financial instruments (CCPS) designated as FVTPL into Equity Shares prior to the IPO of the company.

(3) Adjusted Profit After Tax = PAT plus Fair value expense from financial instruments (CCPS) designated as FVTPL

Consolidated Net Debt Position



Particulars	Q1 FY26	Q4 FY26	Q1 FY27
Net Debt (₹ crore)	4,566	3,635	3,856
Cash & cash equivalent (₹ crore)	131	447	357
Net Debt/Equity (x)	1.04	0.56	0.57
Net Debt/EBITDA (x) ⁽¹⁾	4.34	2.72	2.95

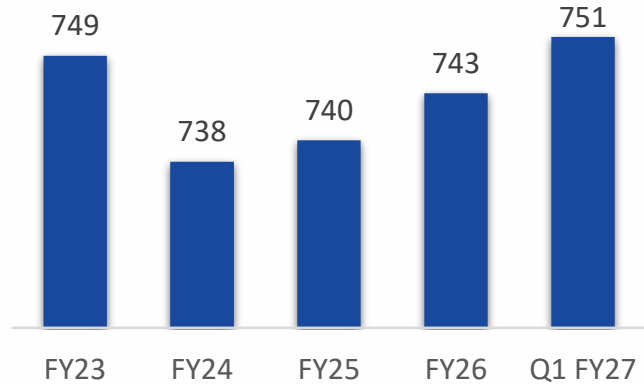
Sustainability, Awards and Recognitions



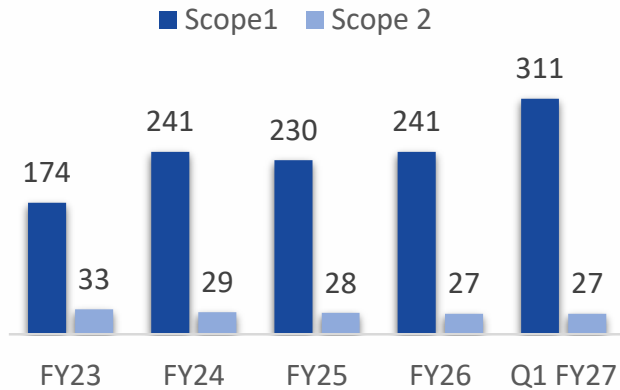
Nandyal Solar Capacity

Sustainability Performance

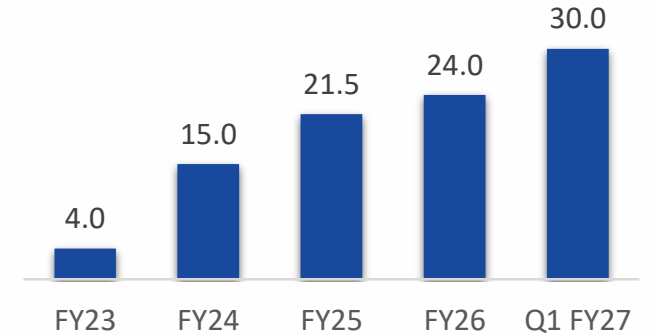
Specific Thermal Energy (Kcal/kg Clinker)



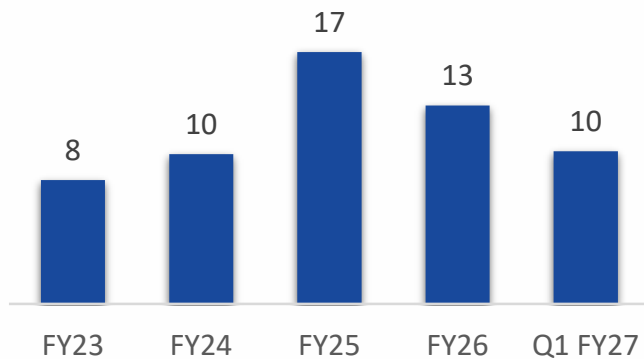
GHG Emission Intensity (tCO₂/tcm)



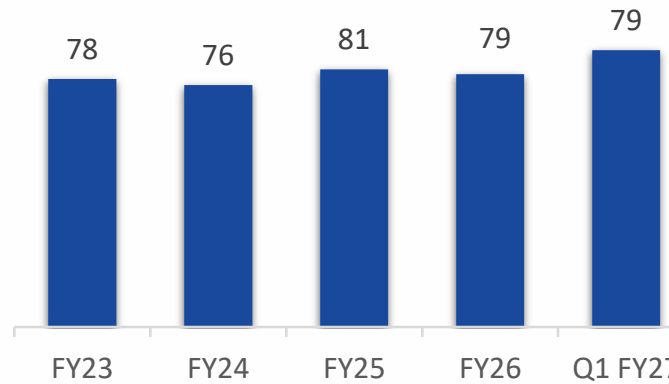
Clean Energy Portfolio (RE+WHRS %)



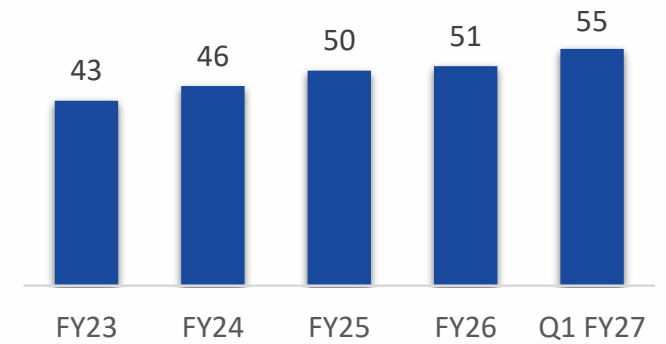
Thermal Substitution Rate (%)



Specific Water Consumption (L/tcm)



Clinker Factor %





Dow Jones
Sustainability Indexes

86/100

CSA score

*Ranked #1 globally in the
construction materials
sector*

*Featured in S&P Global
Sustainability Yearbook
2026*



NSE

Sustainability
Ratings & Analytics

70/100

ESG rating score

*Highest among listed
cement companies in India*



**Portland Slag Cement,
CHD,
GGBS & Microfine GGBS
and Concrete**

*awarded by
EPD International Agency*



SCIENCE
BASED
TARGETS

DRIVING AMBITIOUS CORPORATE CLIMATE ACTION

269 kg/tcm

*Scope 1 and Scope 2 GHG
emissions intensity*

*Near-term target to reduce
emission intensity
by 32.9% by FY2034–35
(vs. FY24 baseline), aligned
with a 1.5°C pathway.*

- JSW Cement has the lowest CO₂ emission intensity within the Indian cement industry and amongst the top global peer group
- Company's FY26 emission intensity was 52% lower than Indian Peers and 50% lower than global peers¹

Awards and Recognitions

Global ESG Awards, India Edition 2026



JSW Cement received Global ESG Award 2026 (Diamond) in the Circular Economy category

World HRD Congress



Shiva: Honored Odisha Best Employer Brand Award and Best Innovation Award (EHS) at the World HRD Congress

Green Enviro Environment Award & Summit



Vijayanagar Plant was awarded the “GOLD AWARD” at the Green Enviro Environment Award & Summit, for outstanding achievement in “Environment Excellence”

FICCI - Resource Efficiency and Circular Economy Industry Coalition



JSW Cement was recognized as 1st Runner-up by FICCI for driving Symposium & Awards on Resource Efficiency and Circular Economy 2026

Corporate Social Responsibility Initiatives

CSR spend reached 6.6 lakh+ beneficiaries across six focus themes in FY 2026

Education

Digital classrooms, scholarships, STEM education and school infrastructure support

59,062 beneficiaries

64,000+ reached · 67 schools on digital classes



Health

Mobile health camps, TB nutrition support, ambulance services and diagnostic facilities

2,46,147 beneficiaries

2,46,000+ reached through health programmes



Rural Development

Drinking water systems, solar street lights and water conservation structures

2,41,454 beneficiaries

2,88,000+ benefited through rural development



Sanitation

Sanitation facilities and community infrastructure improving basic service access

31,205 beneficiaries

Supported across operating communities



Livelihood and income generation

Women entrepreneurship, FPOs, SHGs and skill training for income generation

76,531 beneficiaries

42,000+ benefited through livelihood programmes



Child Protection

Access to Justice initiative preventing child marriage through community awareness

9,350 beneficiaries

14 child marriages prevented · 3,000 pledges mobilised



THANK YOU

Investor Relations Contact

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Jajpur Grinding Unit