



## MOIL LIMITED

(A Government of India Enterprise)  
Regd. Off.: MOIL Bhawan, 1A Katol Road,  
NAGPUR - 440 013

Website: [www.moil.nic.in](http://www.moil.nic.in), E-Mail ID: [compliance@moil.nic.in](mailto:compliance@moil.nic.in), Ph.: 0712- 2806182, Fax: 0712-2591661, CIN: L99999MH1962GOI012398

CS/NSE-BSE/2016-17/ 494

Date 05.12.2016

To,  
The GM (Listing),  
National Stock Exchange of India Ltd,  
Exchange Plaza, Plot No.C-1, G Block,  
Bandra Kurla Complex, Bandra (East),  
Mumbai - 400053

To,  
Listing Department  
BSE Limited  
Phiroze Jeejeebhoy Towers  
Dalal Street  
Mumbai- 400001

**Sub: Intimation of Schedule of Analyst/Institutional Investor Meet for MOIL Limited  
("Company")**

**Ref: Regulation 30 and Regulation 46(2) of the Securities and Exchange Board of India (Listing  
Obligations and Disclosure Requirements) Regulations, 2015**

Dear Sir/Madam,

In terms of Regulation 30 and 46(2) of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, as amended read with corresponding circulars and notifications issued thereunder, it is hereby informed that the Company will be participating in a non-deal roadshow and shall be meeting prospective investors. The meeting details will be uploaded subsequent to the meetings scheduled to be held on December 05, 2016 & December 06, 2016.

A copy of the corporate presentation for the road show is attached. Furthermore, the corporate presentation is disseminated in the website of the Company at [www.moil.nic.in](http://www.moil.nic.in).

This is for your kind information.

Thanking you,

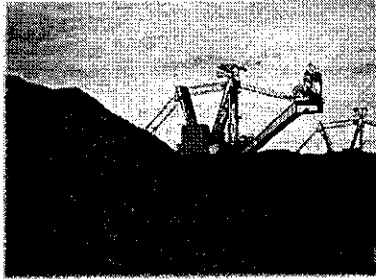
Yours faithfully,

For MOIL Limited

  
(Neeraj Dutt Pandey)  
Company Secretary



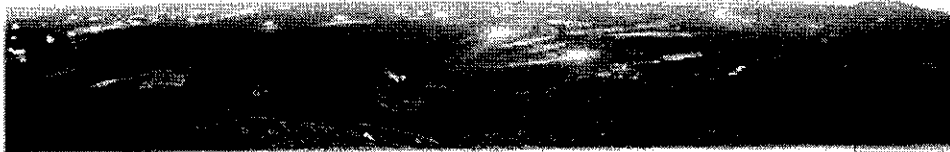
Encl: As above



**MOIL Limited**  
A Government of India Undertaking

**CORPORATE PRESENTATION**

DECEMBER 2016



**Agenda**



- 1 **INDUSTRY OVERVIEW**
- 2 **WORLD MANGANESE SCENARIO**
- 3 **INDIAN MANGANESE SCENARIO**
- 4 **ABOUT MOIL**
- 5 **OPERATIONAL AND FINANCIAL PERFORMANCE**
- 6 **COMPANY STRENGTHS AND STRATEGIES**
- 7 **ACTIVITIES**

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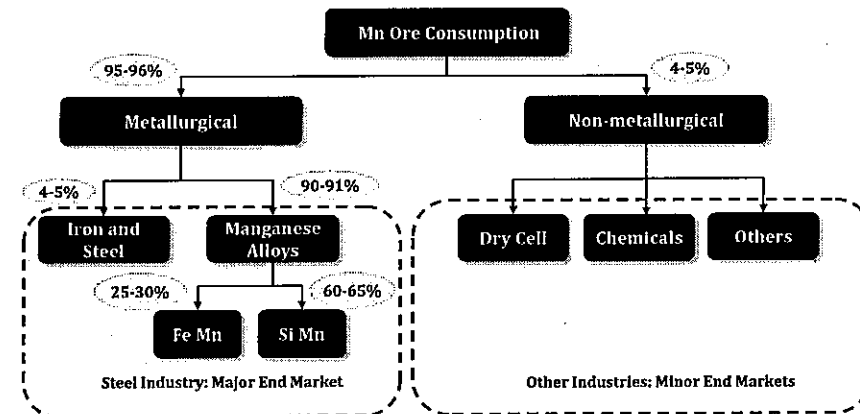
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## Manganese Ore - Uses



- Around 90% of the Mn ore is used in production of Mn Ferroalloys. However, over last decade, the consumption in Si Mn alloys has been increasing vis-à-vis Fe Mn alloys
- Around 4-5% of consumption is for production of hot metal, during production of steel through blast furnace route. Another 4-5% is used in other industries such as dry cell (batteries), chemicals etc.

Source : Market Survey on Manganese Ore (IBM), October 2013

## Industry Overview



- About 95% of the world's production of Manganese Ore is used directly or indirectly in steel making. Hence the demand of manganese ore is directly related to the production of steel.
- The average grade of manganese ore produced in India is low (Mn 32-33%). This necessitates imports of high grade manganese ore to blend with domestic quality of manganese ore for producing ferro/silico manganese required for steel industry. Besides above, India is also the highest exporter of silico manganese in the world.
- India's production of steel for 2015-16 is ~89.78 million tons for which the manganese ore requirement is approx. 3.04 million tons. However, the actual production of manganese ore during the said period was only ~1.90 million tons.
- In the last 3 years, there was surge in the world's production of manganese ore especially in South Africa. During 2015, the global production of manganese ore was 48.69 million tonnes.
- World production of steel reduced by 2.98% in 2015 (from 1647 Million Tonnes to 1598 Million Tonnes). Even after considering the consumption in steel industry with its increased production there was surplus availability of manganese ore by 2.12 million tonnes.

Source: Indian Bureau of Mines ([http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey\\_Manganese%20Ore.pdf/](http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey_Manganese%20Ore.pdf/))  
[http://ibm.gov.in/writereaddata/files/07092014125652IMYB\\_2012\\_Manganese%20Ore.pdf](http://ibm.gov.in/writereaddata/files/07092014125652IMYB_2012_Manganese%20Ore.pdf)

## Agenda

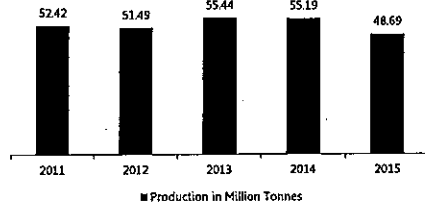


1	INDUSTRY OVERVIEW
2	WORLD MANGANESE SCENARIO
3	INDIAN MANGANESE SCENARIO
4	ABOUT MOIL
5	OPERATIONAL AND FINANCIAL PERFORMANCE
6	COMPANY STRENGTHS AND STRATEGIES
7	ACTIVITIES

## Manganese Ore | Global Environment



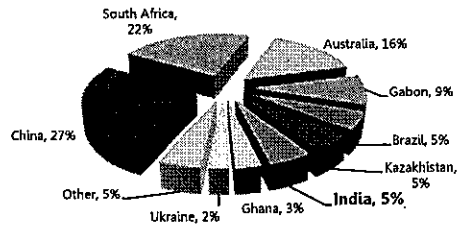
### World Manganese Ore Production



Figures for Calendar Year, (Source: IMI)

### World Manganese Ore Production - 2015\*

China and India account ~32% of production



(\*Figures for Calendar Year), Source: IMI

### World's Country-wise Production of Manganese Ore

Rank	Country	Production (Million Tonnes)
1	China	13.00
2	South Africa	10.81
3	Australia	7.60
4	Gabon	7.41
5	Brazil	2.60
6	Kazakhstan	2.60
7	India	2.55
8	Ghana	2.51
9	Ukraine	1.16
10	Other	2.25

(Source: IMI)

\*Qty in million tonnes - Calendar year 2015

### Major Producers of Manganese Ore in respective countries

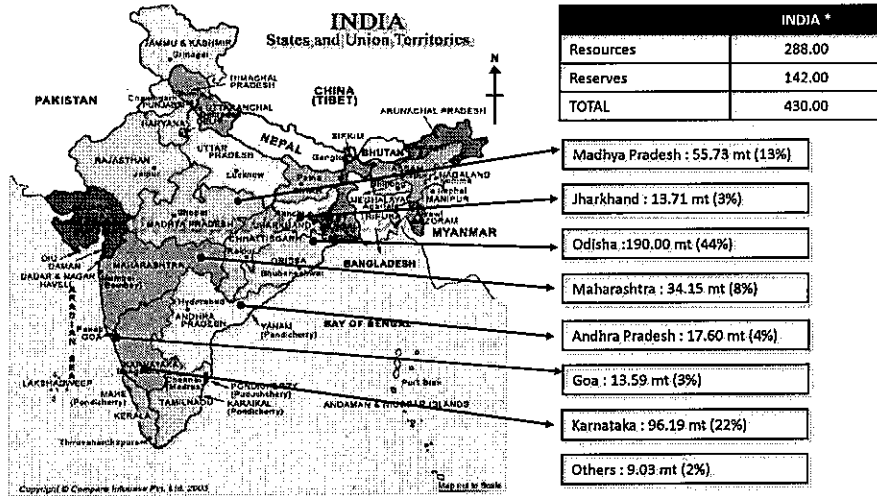
Rank	Country	Major Producer
1	South Africa	BHP BILLITON, ASSAMG, UMK
2	Australia	BHP BILLITON, CONSMIN
3	Gabon	COMILOG
4	Brazil	VALE
5	Kazakhstan	ENRC
6	India	MOIL
7	Ghana	CONSMIN

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- 6 COMPANY STRENGTHS AND STRATEGIES
- 7 ACTIVITIES

## Manganese Ore Reserves in India (in Million Tonnes)

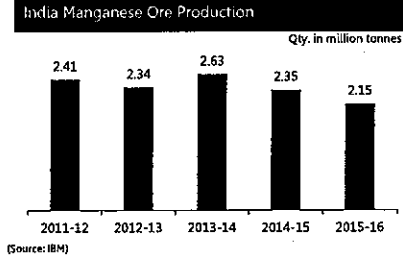


MOIL had Manganese Ore Resources of 49.72 mt and Reserves of 31.75 mt, totalling it to 81.47 mt as on April 1, 2016.

\* India as on 01.04.2016

Source: Indian Bureau of Mines ([http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey\\_Manganese%20Ore.pdf](http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey_Manganese%20Ore.pdf)) / MOIL

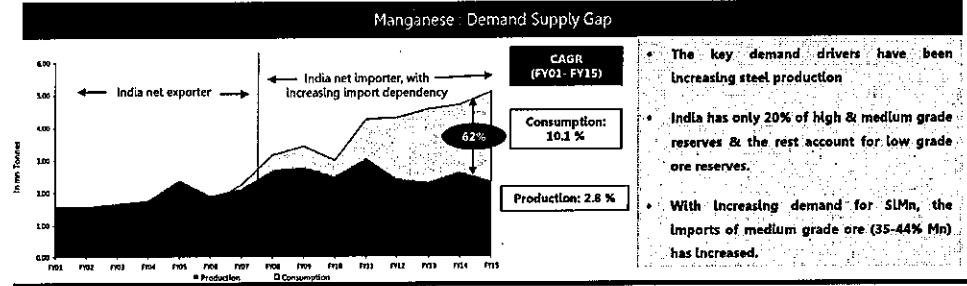
## Manganese Ore | India Scenario



(Source: IBM)

State wise Production of Manganese Ore, 2015-16 (P)		
1	Odisha	190.00
2	Gujarat	38,223
3	Jharkhand	1,500
4	Karnataka	1,45,374
5	Madhya Pradesh	76,800
6	Maharashtra	614,481
7	Chhattisgarh	383,637
8	Rajasthan	3,457
9	West Bengal	6,822

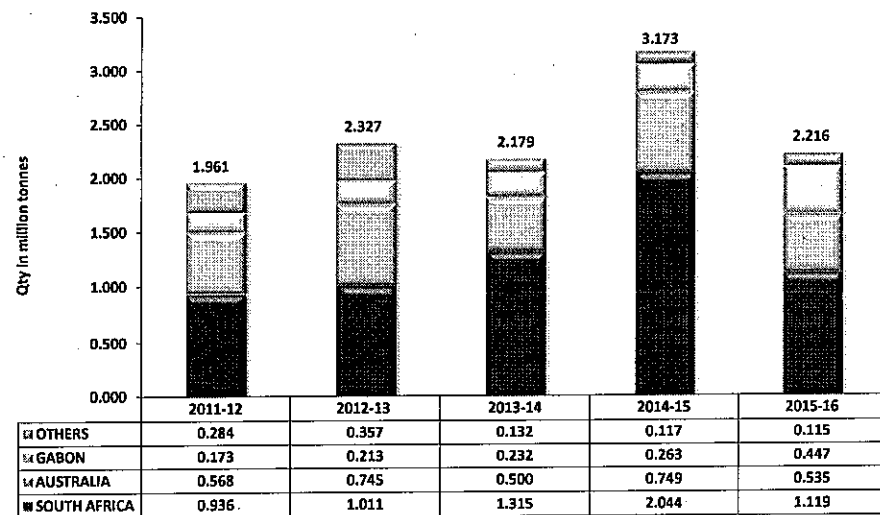
(P): Provisional. Source: IBM



Source: IBM

- The key demand drivers have been increasing steel production
- India has only 20% of high & medium grade reserves & the rest account for low grade ore reserves.
- With increasing demand for SLMn, the Imports of medium grade ore (35-44% Mn) has increased.

## Import of Manganese Ore in India | Country wise



Source: DGFT (Directorate General of Foreign Trade)

## Agenda



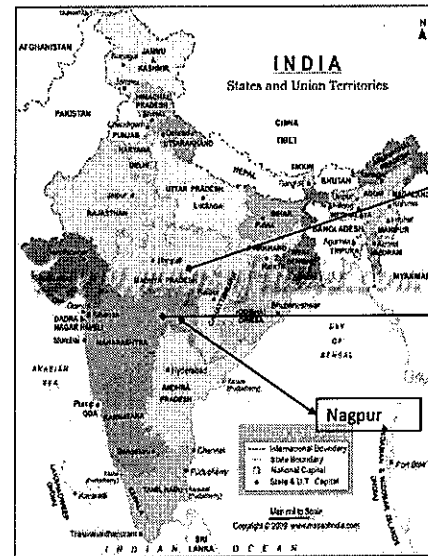
- 1 INDUSTRY OVERVIEW
- 2 WORLD MANGANESE SCENARIO
- 3 INDIAN MANGANESE SCENARIO
- 4 ABOUT MOIL
- 5 OPERATIONAL AND FINANCIAL PERFORMANCE
- 6 COMPANY STRENGTHS AND STRATEGIES
- 7 ACTIVITIES

## MOIL Limited – A Brief History



Year	Milestone
1889	<ul style="list-style-type: none"> <li>Central Prospecting Syndicate was formed to prospect for manganese deposits.</li> <li>The First Prospecting License was taken in 1899 at Munsar and work commenced in the same year.</li> </ul>
1908	<ul style="list-style-type: none"> <li>The Syndicate was converted in to a Public Company as Central Provinces Manganese Ore Company Limited (CPMO) incorporated in UK.</li> <li>Later, CPMO acquired mines in Nagpur, Bhandara and Balaghat districts.</li> </ul>
1962	<ul style="list-style-type: none"> <li>On 22<sup>nd</sup> June 1962, MOIL was incorporated by Government of India.</li> <li>Through an agreement between the Government of India and the CPMO, the assets were taken over by MOIL and as a result, CPMO held 49% shares and the rest was held by Government of India and the State Governments of Maharashtra and Madhya Pradesh.</li> </ul>
1977	<ul style="list-style-type: none"> <li>The Remaining 49% of shares were acquired by the Government of India from CPMO and MOIL became a 100% Government Company.</li> </ul>
2010	<ul style="list-style-type: none"> <li>The Company got listed in Dec-2010 with divestment of 10% shares by Central Government and 5% each by State Governments of Maharashtra and Madhya Pradesh.</li> </ul>
2014	<ul style="list-style-type: none"> <li>The Company got Schedule 'A' status in January -2014.</li> </ul>

## MOIL Limited | Location of Mines



### Madhya Pradesh

**Balaghat District**  
Balaghat  
Sitapatore  
Tirodi  
Ukwa

### Road distance from Nagpur in Kms.

Balaghat	217
Sitapatore	156
Tirodi	146
Ukwa	254

### Maharashtra

**Nagpur District**  
Beldongri  
Gumgaon  
Kandri  
Munsar

Beldongri	40
Gumgaon	35
Kandri	42
Munsar	45

**Bhandara District**  
Chikla  
Dongri-Buz

Chikla	116
Dongri	122



## Board of Directors



<p>Shri M P Chaudhari, Chairman-cum-Managing Director</p>	<p>A Qualified Chartered Accountant appointed on Board in August 2012. He started his career with M/s Bajaj Steel Industries Limited as a Accounts Officer and has worked in other private sector companies before joining MOIL in December, 1997 as Manager (Finance). He has more than 27 years experience in the field of finance, accounts and taxation.</p>
<p>Shri T. K. Pattnaik, Director (Commercial)</p>	<p>Holds B.A. (Honours), M.A. (Pol. Sci.), M.A. (Pub. Admn.). He has worked on various key position in SAIL up to the position of General Manager. He also worked with Govt. of India as Dy. Development Commissioner for Iron &amp; Steel on Reverse Foreign Services upon recommendations of UPSC between 1988-1990.</p>
<p>Ms. Urvila Khatri, Govt. Of India – Nominee Director</p>	<p>Holds M.A., M. Phil. (International Politics), M.Phil. (Social Science) Master's Diploma in Public Administration, MBA (Australia). She is on the Board of MOIL since November, 2011. Has extensive experience in various administrative posts. Previously, worked as Joint Secretary in Ministry of Water Resources, RD &amp; GR, Govt. of India and JS equivalent in Ministry of Railway.</p>
<p>Ms. Sangita Galroia, Independent Director</p>	<p>Holds B.A. (Hons), M.A. She is a retired I.A.S. officer of 1977 Batch [R]. Cadre. She had served as an I.A.S. officer in the State Govt. of Rajasthan in various capacities like Secretary, Dept. of Women and Child Development Principal Secretary, Dept. Tourism, Art &amp; Culture, Chief Electoral Officer and also served in Govt. of India as Joint Secretary, Ministry of Home Affairs, Adtl. / Spl. Secy., Ministry of Social Justice &amp; Emp., Secretary, Ministry of Culture, Secretary, Ministry of Defense (D/o ESW). She possesses work experience of administration and management.</p>

**Note:**

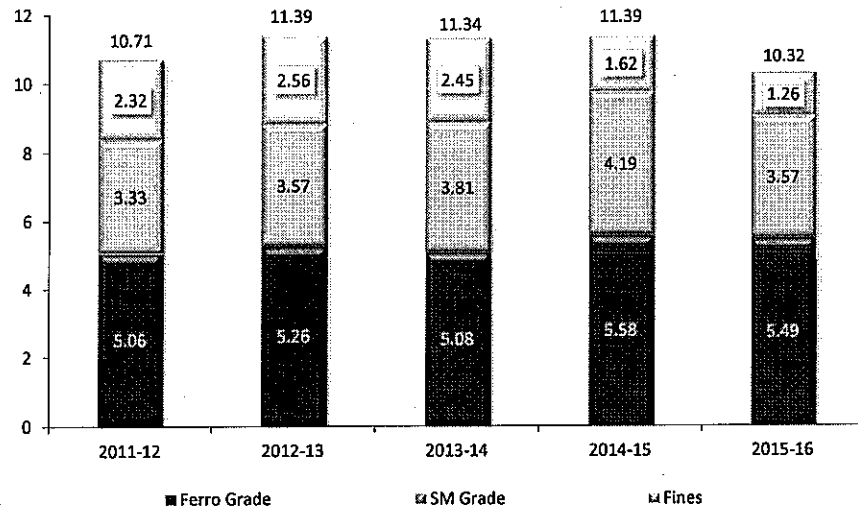
- (1) Shri M P Chaudhari has also been assigned with additional charge of the post of Director (Production and Planning), for a period of three months w.e.f November 01 2016, or till regular incumbent joins the post, or until further order, whichever is the earliest.
- (2) Term of four Independent Directors namely Dr A. K. Lomas, Shri G S Grover, Smt. Sunanda Prasad & Shri J P Dange has been completed on November 17, 2016. Appointment of new Independent Directors on the Board of the Company is in process.

## Agenda



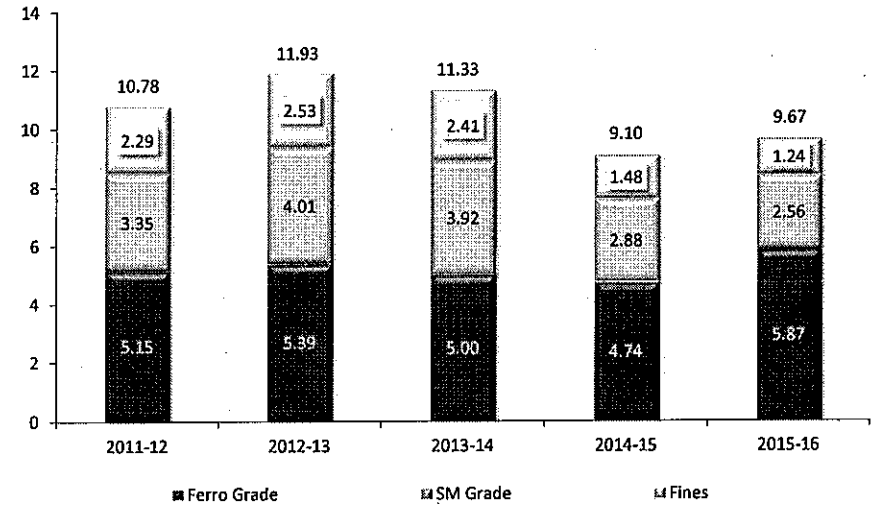
- 1 INDUSTRY OVERVIEW
- 2 WORLD MANGANESE SCENARIO
- 3 INDIAN MANGANESE SCENARIO
- 4 ABOUT MOIL
- 5 OPERATIONAL AND FINANCIAL PERFORMANCE
- 6 COMPANY STRENGTHS AND STRATEGIES
- 7 ACTIVITIES

### Production of Manganese Ore (in Lakh Tonnes)



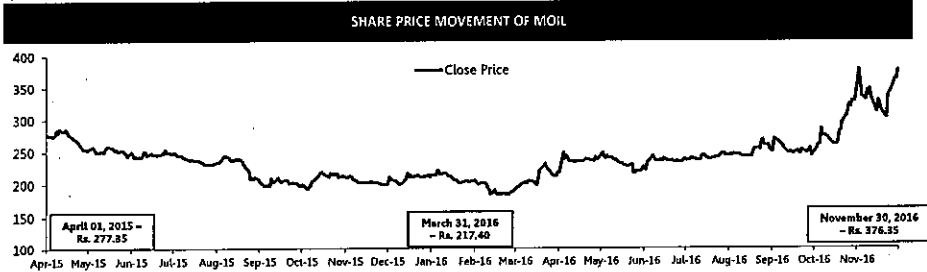
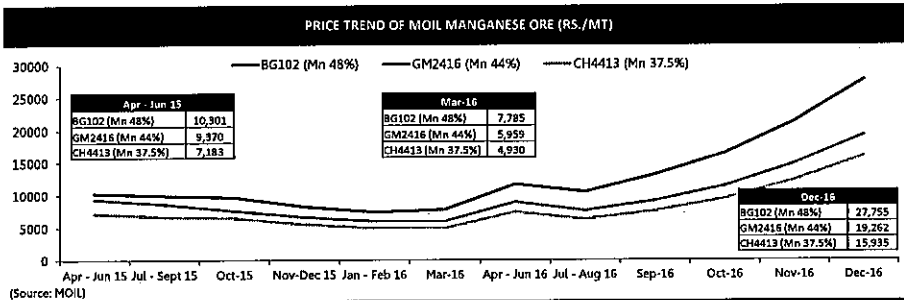
Aforesaid information is for Financial year

### Sale of Manganese Ore (in Lakh Tonnes)

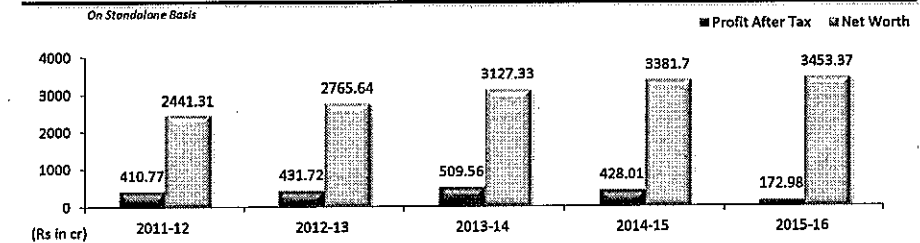
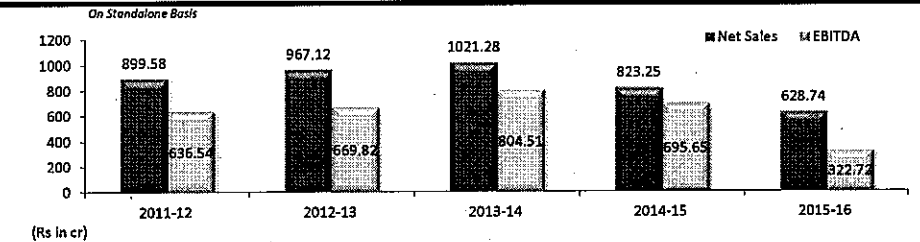


Aforesaid information is for Financial year

## MOIL Manganese Ore Price relation with Share Price Movement



## Financial Snapshot - Annual Trends

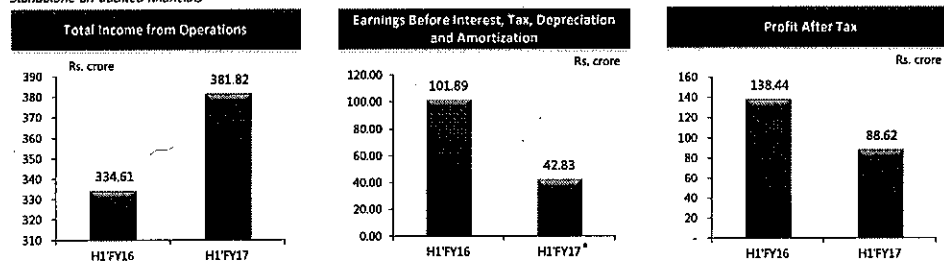


Despite reduction in Manganese ore prices by about 50% between Jan 2015 and March 2016, MOIL has been able to restrict the reduction in average sales realisation to only 28%, which has been possible due to higher production and sales of high grade ores. The improved product mix has enabled the company to register profits.

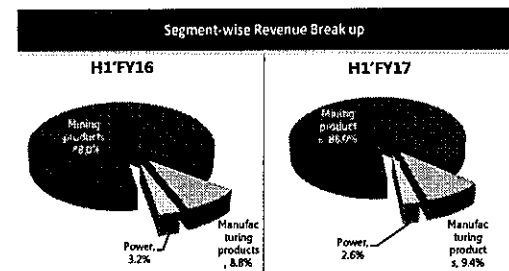
## Financial Snapshot – Half Year | FY17



Standalone un-audited financials



\*Exceptional item has been considered for calculation of EBITDA



- The Company has adopted IND-AS from April 01, 2016.
- Reduction in profits mainly due higher sale of low grade ores, accumulated in previous year, during the period
- Company has also completed the Buyback process in accordance with Securities & Exchange Board of India (Buy Back of Securities) Regulations, 1998, on October 07, 2016 which was approved by Board of Directors in the meeting dated June 07, 2016. Consequently, the paid up share capital stands reduced to Rs. 133.19 crore and general reserve at Rs. 2,542.92 crores

## Dividend Paid



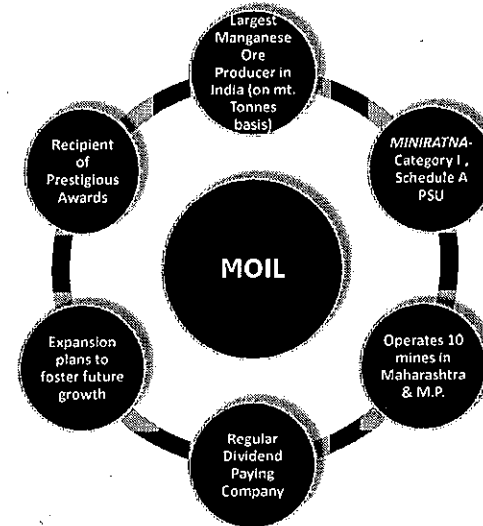
Years	Total equity capital as on 31 <sup>st</sup> March	Total dividend paid (₹ in Crores)	Total dividend as % age of total equity	Total dividend as %age of PAT (Payout)
2011-12	168.00	84.00	50%	20.45%
2012-13	168.00	92.40	55%	21.40%
2013-14	168.00	126.00	75%	24.73%
2014-15	168.00	142.80	85%	33.36%
2015-16	168.00	84.00	50%	48.56%
<b>Total (5 Years)</b>		<b>529.20</b>		

## Agenda

1	INDUSTRY OVERVIEW
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3	INDIAN MANGANESE SCENARIO
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## Key Strengths



Source: Indian Bureau of Mines ([http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey\\_Manganese%20Ore.pdf/](http://ibm.nic.in/writereaddata/files/07142014124825Market%20Survey_Manganese%20Ore.pdf/))  
[http://ibm.gov.in/writereaddata/files/07092014125652IMYB\\_2012\\_Manganese%20Ore.pdf](http://ibm.gov.in/writereaddata/files/07092014125652IMYB_2012_Manganese%20Ore.pdf)

## Competitive Strengths & Key Business Strategies



### Competitive Strengths

Largest producer of manganese ore in India with access to significant reserves

Well positioned to capture the growth potential of the Indian steel industry

Track record of growth and efficient operations

Strategic location of our mines provides us with competitive advantages

Strong track record of financial performance

Strong capabilities for exploration, mine planning and research development

Experienced senior management and large pools of skilled manpower

### Key Business Strategies

Maintain our leadership position in India and continue to increase production levels at our existing mines to capitalize on expected growth of the Indian steel sector.

Engage in exploration through our extensive lease holdings to prove additional reserves

Achieve higher forward integration to capture additional margin

Continue to increase margins, efficiency, profitability and control costs

Continue our focus on developing environmentally friendly and socially sustainable operations

## Additional Activities



### Non-Conventional Source of Energy

MOIL has installed wind farms for captive power requirement and to promote non-conventional energy resources. The present capacity is 20 MW.

MOIL is planning to setup 10.5 MW Solar Power Plant at mines in Madhya Pradesh and Maharashtra

### Exploration and Prospecting works in Madhya Pradesh

MOIL has signed Memorandum of Understanding (MoU) jointly with Government of Madhya Pradesh, Mineral Resources Department and Madhya Pradesh State Mining Corporation Limited (MPSMCL), to conduct exploration and prospecting works by MOIL in Madhya Pradesh.

MoU also envisages formation of a Joint Venture Company between MOIL (51%) and MPSMCL (49%), in case of availability of ore is proved, in any area.

MoU is aimed at increasing the mineral resources in Madhya Pradesh

## Strategic Management Plan : 2030



- Taking into consideration anticipated growth in steel production and, as a result, increase in requirement of manganese ore, the company has prepared Strategic Management Plan (SMP) covering a period upto 2030.
- The SMP envisages availability of MOIL's ore at a level of 3.00 million MT by 2030.
- In this direction, several shaft sinking and deepening projects have been completed and has some ongoing and planned projects.

Source: MOIL Annual Report 2016.

## Capital Projects | Ongoing projects



S. No.	New Projects	Capex (in Cr.)	Expected year of completion
1.	Deepening of Holmes shaft from 12 <sup>th</sup> Level to 16.5 Level	28.30	2016-17
2.	Sinking of 2 <sup>nd</sup> vertical shaft at Chikla mine. The shaft diameter is 4.5 meters, having a depth of 160 meters.	48.70	2018-19
3.	Deepening of vertical shaft at Kandri mine by 57 mtrs.	14.82	2018-19
4.	Sinking of 2 <sup>nd</sup> vertical shaft at Munsar mine. The shaft diameter is 4.5 meters, having a depth of 160 meters.	51.32	2019-20
5.	Sinking of 2 <sup>nd</sup> vertical shaft at Ukwa mine. The shaft diameter is 5.5 meters, having a depth of 324 meters.	77.15	2020-21

## Recently approved mining projects



### Sinking of high speed vertical shaft at Balaghat Mine

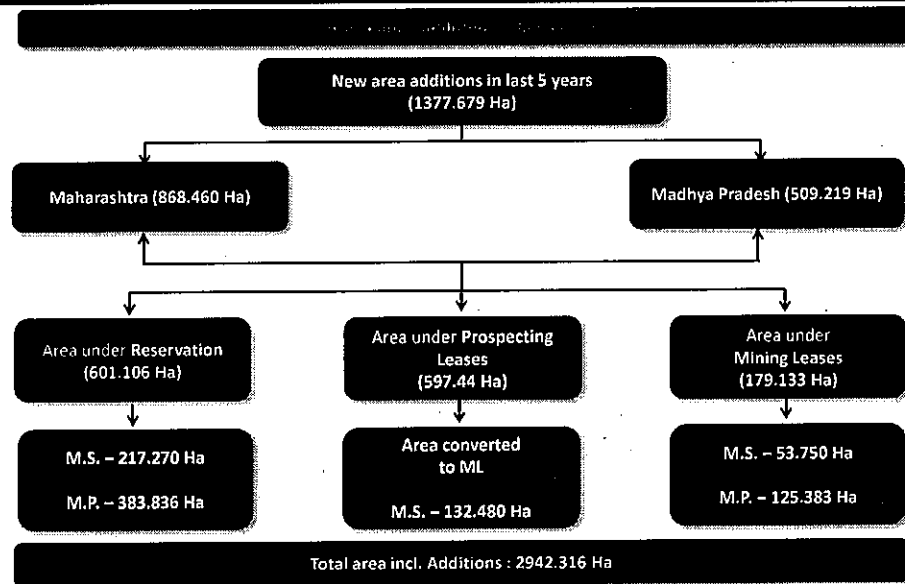
- The high speed shaft involves Capex of Rs. 265.96 Cr.
- The total production from the mine is likely to touch 0.6 mn MT from 0.3 mn MT.

### Sinking of high speed vertical shaft at Gumgaon Mine

- The high speed shaft involves Capex of Rs. 194.92 Cr.
- The total production from the mine is likely to touch 0.14 mn MT from 0.07 mn MT.

The Mining Projects recently completed/taken up/recently approved/envisaged by the Company will help in sustaining as well as increasing production to a level of 2.00 million MT by 2020.

## MOIL | New Area Development



Source: Stock Exchange Filings and MOIL's Annual Report(s).  
M.S.: Maharashtra, M.P.: Madhya Pradesh



## Agenda



- 1 INDUSTRY OVERVIEW
- 2 WORLD MANGANESE SCENARIO
- 3 INDIAN MANGANESE SCENARIO
- 4 ABOUT MOIL
- 5 OPERATIONAL AND FINANCIAL PERFORMANCE
- 6 COMPANY STRENGTHS AND STRATEGIES
- 7 ACTIVITIES

31

## Underground Mining Operations



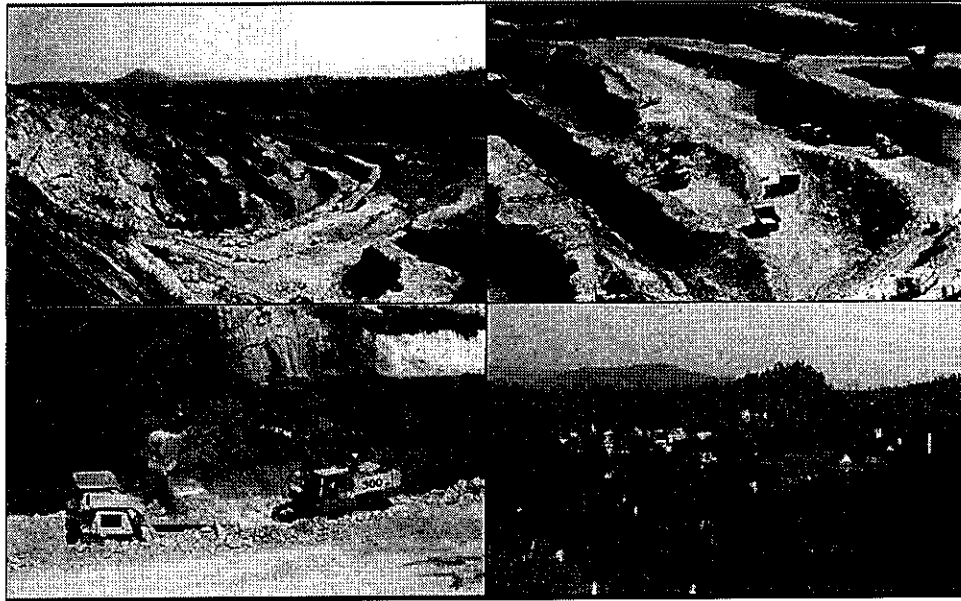
Production Shaft & Cable Bolting Operations

01/03/2003

Side Discharge Loader – Balaghat Mine

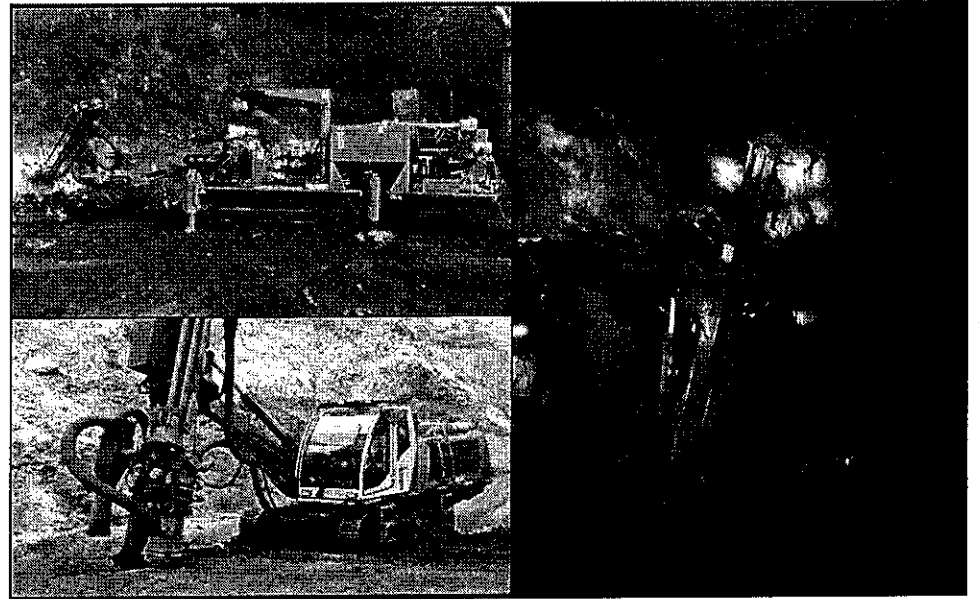
32

## Opencast Mining Operations



33

## Introduction of Mechanization in UG/OC Mines



34

## Value Addition – EMD (Dongri Buzurg) and FM Plant (Balaghat)



- ❖ The Plant was installed through in-house R&D and the EMD produced is of good quality. MOIL's EMD is well established in the market. The plant Capacity is 1000 TPA. The Plant has bagged PRESIDENT OF INDIA NATIONAL ENERGY CONSERVATION AWARD IN 2006 & 2007.



- ❖ The Ferro Manganese Plant is located at Balaghat in Madhya Pradesh. This is the only pit head plant in the country. The Capacity of the Plant is 10000 tpa and produces Ferro Manganese of very high quality comparable to international standards.



35

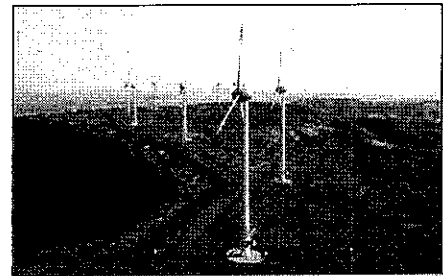
## Value Addition through beneficiation and Wind Farm



- ❖ The Company has successfully commissioned in September 2007, a 500,000 TPA state of the art Integrated Manganese Ore Beneficiation Plant with most modern fully computerized bottom air pulsated jigs.
- ❖ The Plant is the first of its kind in India for manganese ore beneficiation. The entire ROM produced from Balaghat Mine is handled through the Plant.



- ❖ MOIL is one of the first Public Sector Company in the country to install wind farms for captive power requirement and to promote non-conventional energy resources. The present capacity is 20 MW (2006-07).



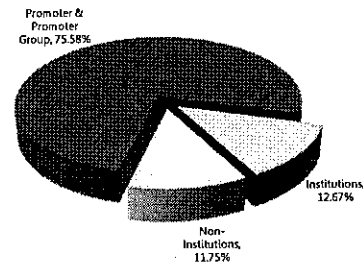
36

**ANNEXURE**

**Shareholding Pattern**



Shareholding Pattern as on October 11, 2016



Investor	No. of Shares	% of paid up equity shares
<b>DOMESTIC INVESTOR*</b>		
Life Insurance Corporation of India	17,49,306	1.31%
United India Insurance Company Limited	14,30,967	1.07%
<b>FOREIGN INVESTOR*</b>		
MFS International New Discovery Fund	39,71,364	2.98%

\*Investor holding more than 1% of the paid up equity shares



# THANK YOU!

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