



Dated: August 21, 2019

**The Manager
BSE Limited
Corporate Relationship Department
Phiroze Jeejeebhoy Towers
Dalal Street
Mumbai- 400001**

**The Manager
National Stock Exchange of India Ltd
Listing Department
Exchange Plaza, 5th Floor, Plot no C/1
G Block, Bandra Kurla Complex
Bandra (E), Mumbai-400 051**

Scrip Code: BSE- 540750; NSE- IEX

Subject: Investors Presentation Q1 Financial Year 2020

Dear Sir / Madam,

Pursuant to Regulation 30 of the SEBI (LODR) Regulations, 2015, please find attached Investor presentation Q1 Financial Year 2020.

This is for your information and records.

Thanking You

Yours faithfully,

For **Indian Energy Exchange Limited**

**Vineet Harlalka
Company Secretary & Compliance Officer**




Encl: as above

Investor Presentation

Q1 FY 2020

- IIFL Conference – New Delhi

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- 1 India's economic roadmap
 - 2 Energy transformation drivers
 - 3 Power market – key drivers
 - 4 IEX - driving the thought leadership
 - 5 Summary

India continues to remain the fastest growing emerging economy – Electricity a key input to growth!

- India GDP projected at 6.9% for FY'20
- Government envision to make India \$5tn economy by FY'25
- India is poised to surpass Japan to become the third largest economy in 2025
- World's 17 of 20 fastest growing cities in India

- India is the 3rd largest producer and consumer of electricity in the world; and 5th largest in RE capacity
- Make in India - target to increase contribution of manufacturing in GDP to 25% from 17% currently.
- Industrial sector consumes 42% of total electricity in India whereas agriculture and domestic consume 18% and 24% respectively.

Sectoral contribution to GDP %	FY'19 (%)
Agriculture, forestry & fishing	16.1
Mining & quarrying	2.4
Manufacturing	16.4
Construction	8.0
Services	57.1

Decarbonization



- The rapid deployment of low-carbon technologies such as wind and solar.
- **Outlook:**
 - Renewables will become leading energy sources
 - New technologies like hybrid would emerge in future depending on local characteristics and specific financial incentives.

Decentralization



- The distribution of small-scale generation throughout the T&D network.
- **Outlook:**
 - RE in general will pose a threat to centralized energy production paradigm.
 - Need for local solutions will increase

Digitization



- The addition of intelligent control systems and internet-enabled software to optimize plants and the grid.
- **Outlook:**
 - Aggregation (DR,VPP) would emerge with the adoption of new digital technologies.

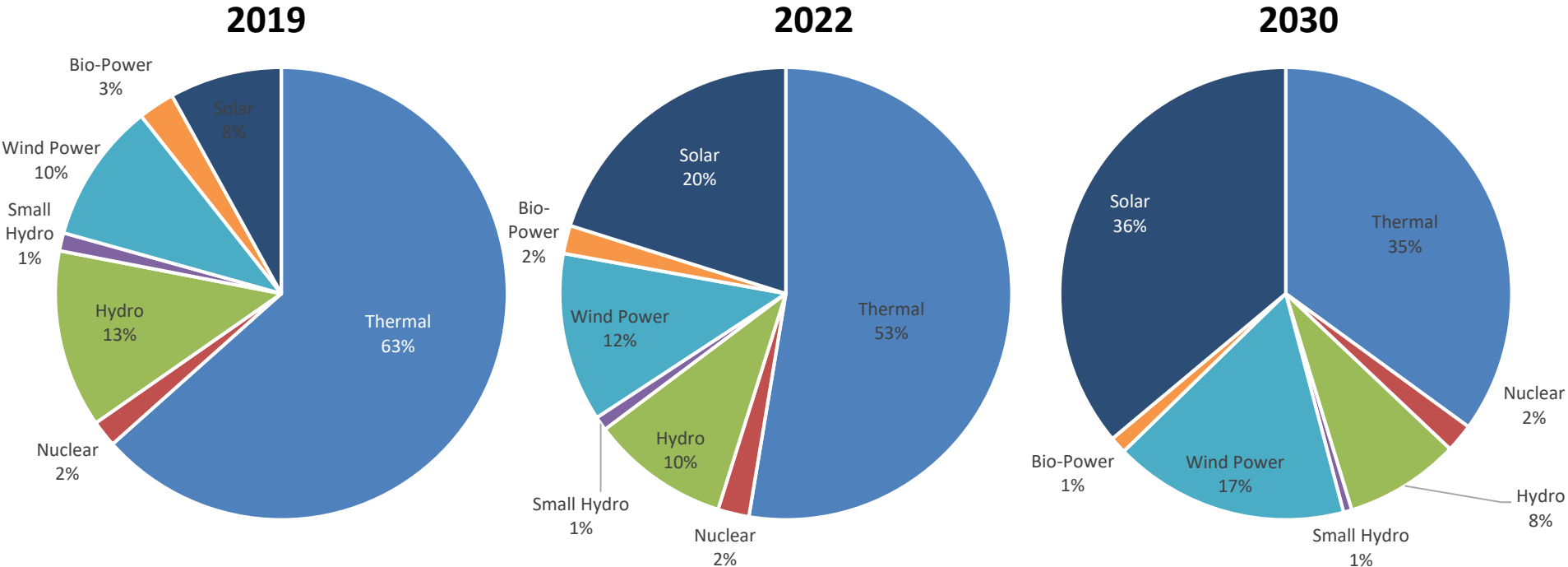
Democratization



- The empowerment of consumers by putting of economic power in the hands of individuals and taking some political power away from large corporations.
- **Outlook:**
 - Energy trading between consumers

Increasing play of renewable energy

Paris Climate Agreement – Ren energy to constitute 40% of total installed capacity base of 1250 GW



- RE target of 175 GW by 2022, current 79GW
- \$5Bn of transmission line capacity augmentation
- Decentralized generation close to consumers
- New tech, innovative solutions & business models

Growing demand

- Government of India's commitment to provide electricity to all and on 24x7 basis
- Economy growth from \$ 2.7tn to \$ 5tn by FY 2025
- Paris Climate Agreement
- Rapid Urbanization and Smart Cities

Total electricity demand in the country has increased by 4.5% in the last 5 years

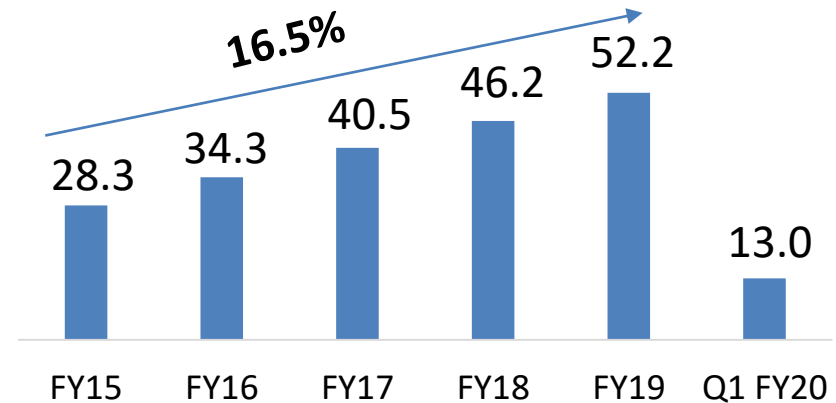
Policy and Regulatory enablers

- MoP 5 year vision document
- Government's focus to address DISCOM distress
- Market framework
 - Real Time Electricity Market and National Open Access Registry
 - Domestic Coal Allocation
 - Phasing out of Old plants
 - Cross Border Trade; Long Duration Contracts; Green TAM
- Budget highlights: Uday 2.0, addressal of barriers to open access like Cross Subsidy Surcharge; electric mobility

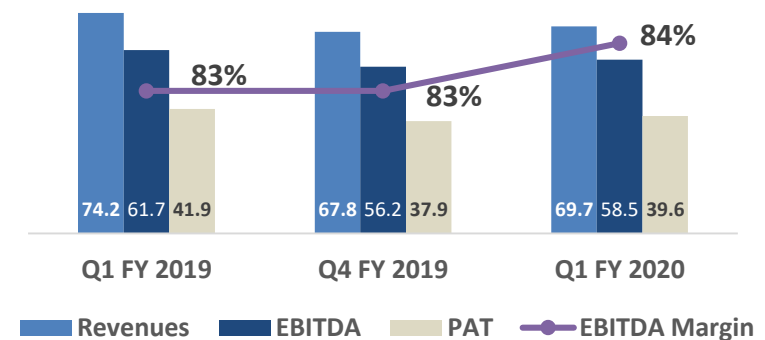
IEX has seeded & developed a robust power market in India

- Ensuring Availability and Accessibility of electricity aligned with the government's vision:
 - Power for all
 - Power on 24*7
- Ensuring competitive price discovery through diversified participation
- Providing flexibility in procurement
- Scalable and proven technology infrastructure

Electricity Cleared Volume (BU)



Financial Performance (Rs Cr)



Increasing ease of doing business and reducing cost of doing business

Business strategy aims to diversify market offering to maximize core

Maximize Core

Real Time Markets; National Open Access Registry

Strengthen day ahead market

Long duration contracts to create market from 1day to 365 days

Cross Border Trade

G-TAM

Ancillary Markets

New Opportunities

Technology Play

- India will continue to be the fastest growing economy.
- Energy will be a critical input into India's growth story.
- India is on the cusp of shift in the energy sector.
- Power markets are at nascent stage; potential for growth is immense.
- Increase in power demand and regulatory enablers will accelerate power exchange market.
- IEX is delivering the government's vision

Thank You