

**KRÁTA CORP ADVISERS**  
**WE HELP YOU GROW**



## **An Introduction**

# An Overview

**KRÁTA CORP ADVISERS**, founded by CA. Kashyap H Choksi, an experienced Investment Banker who has successfully closed over 42 transactions aggregating over INR 8,000 crores.

**KRÁTA CORP ADVISERS**, established in 2014, aims to be a one stop corporate finance advisory firm and play a noteworthy role to mid and emerging companies in India.

**KRÁTA CORP ADVISERS** is committed to serve the needs of owners, shareholders and managers of – both public listed and privately owned - mid-sized and emerging businesses.

We bring together companies, capital and creativity to assist our clients achieve their personal and strategic objectives.

We believe every investor has varying investment needs. We provide custom tailored financial solutions to suit personal goals and maximizing wealth.

Services will be provided through KRÁTA or its tie-ups and / or associates

# Our Proposal

**KRÁTA CORP ADVISERS** will work on behalf of the Company / Owners / Shareholders, through complete hand-holding, become a catalyst in their growth rather than just one more service provider.

For regulated transactions, **KRÁTA CORP ADVISERS** will work on behalf of the Company / Owners / Shareholders, through complete hand-holding, prepare them for the Regulatory Process before the Transaction is undertaken by Regulatory registered intermediaries.

**KRÁTA CORP ADVISERS** will act as the single point of contact and will liaise with all other intermediaries ensuring that the overall objectives of the client are met in compliance with the applicable regulatory requirements.

# CA. Kashyap H Choksi – Founder - Managing Partner



Kashyap has been in Investment Banking since 2000 post Qualification as a CA.

As an Investment Banker, Kashyap has handled entire gamut of :

| Capital Markets<br>Public and Private markets  | Mergers & Acquisition                               | Private Equity                               | Others Areas   |
|--|---|--|--|
| IPOs, Qualified Institutional Placement, Offer for Sale, Institutional Placement Programme, Rights, Delistings, Buybacks, Secondary blocks etc | Advising for acquisitions, divestments, Open Offers | Representing both the Buy-Side and Sell-side | Corporate Advisory<br>Alternate Capital<br>Restructuring |

comprising over 42 successfully closed transactions aggregating over INR 8,000 crs.

Post qualification, Kashyap started his career with SBI Capital Markets (2000-2002), Ambit Corporate Finance (2002-2009), Antique Capital Markets (2009-2012) and then with Ambit Corporate Finance (2012-2014) prior to founding KRÁTA CORP ADVISERS in 2014.

Kashyap is a Chartered Accountant (first attempt – Nov 99) and has done his Bachelor of Commerce from Narsee Monjee College (University of Mumbai).

## PUBLIC CAPITAL MARKETS

Advisory Services and complete hand- holding for:

- Initial Public Offerings
- Further Public Offerings
- Qualified Institutional Placements
- Rights Issues
- Offer For Sale
- Capital Structuring
- Buybacks
- Delisting offers
- Secondary blocks Equity placement
- Debt Syndication etc

KRÁTA will be acting as a single point of contact on behalf of the Company / Owners / Shareholders and will liaise with all other intermediaries ensuring that the overall objectives of the client are met in compliance with the applicable regulatory requirements.

In case of Services requiring regulatory registration, KRÁTA will act as the single point co-ordinator, while the performance of regulatory services will be provided by the regulatory registered intermediary appointed for the purpose.

Services will be provided through KRÁTA or its tie-ups and / or associates

## PRIVATE CAPITAL MARKETS

Advisory Services and complete hand- holding for:

- Syndication of Private Equity
  - First round of capital raising
  - Subsequent round of capital raising
- Exit to Private Equity Funds / Institutional Investors / HNI Investors

## ALTERNATE CAPITAL RAISING

- Structured financing
- Acquisition funding
- Leverage Buyouts
- Management buyouts etc

KRÁTA will be acting as a single point of contact on behalf of the Company / Owners / Shareholders and will liaise with all other intermediaries ensuring that the overall objectives of the client are met in compliance with the applicable regulatory requirements.

In case of Services requiring regulatory registration, KRÁTA will act as the single point co-ordinator, while the performance of regulatory services will be provided by the regulatory registered intermediary appointed for the purpose.

Services will be provided through KRÁTA or its tie-ups and / or associates

### MERGERS & ACQUISITION

Advisory Services and complete hand- holding for:

- Acquisition of a Business / Company
- Divestment of a Business / Company
- Strategic partnerships
- Structuring of the Transactions
- Compliance with applicable SEBI Takeover Regulations
- Compliance with SEBI Listing and Disclosure Obligations
- On-going compliance with SEBI Takeover for creeping acquisition by Promoter / major stakeholders

### CORPORATE ADVISORY SERVICES

- Restructuring of operations
- Other incidental services

KRÁTA will be acting as a single point of contact on behalf of the Company, Owners, Shareholders and will liaise with all other intermediaries ensuring that the overall objectives of the client are met in compliance with the applicable regulatory requirements.

In case of Services requiring regulatory registration, KRÁTA will act as the single point co-ordinator, while the performance of regulatory services will be provided by the regulatory registered intermediary appointed for the purpose.

Services will be provided through KRÁTA or its tie-ups and / or associates

## CERTIFICATIONS

Certifications work related to :

- IPOs including OFS
  - STT certification on OFS component
  - Various numbers used in DRHP not coming directly from statutory accounts
- Open Offer
  - Open Offer pricing
  - Adequacy of Funds
  - Financial numbers used in the Offer Document
  - Income Tax provisions related aspects for tendering the shares
  - Valuation for infrequently traded shares through registered Valuers
- Delistings / Buybacks Divestment of a Business / Company
  - Pricing and financial numbers
  - Income Tax provisions related aspects for tendering the shares
  - Valuation for infrequently traded shares through registered Valuers

KRÁTA will be acting as a single point of contact on behalf of the Company, Owners, Shareholders and will liaise with all other intermediaries ensuring that the overall objectives of the client are met in compliance with the applicable regulatory requirements.

In case of Services requiring regulatory registration, KRÁTA will act as the single point co-ordinator, while the performance of regulatory services will be provided by the regulatory registered intermediary appointed for the purpose.

Services will be provided through KRÁTA or its tie-ups and / or associates / network partners



# Recently Concluded Transaction



over INR 100 cr

Fund Raising from  
Peepul Capital

## Deal Summary

- ECOM Express, a Delhi based company, is one of India's fastest growing, e-commerce dedicated logistics solutions providers
- Founded in 2012 by entrepreneurs who are veterans in the Logistics industry (the “**Promoters**”), and supported by **Angel Investors** led by **Oliphans Capital**
- ECOM Express raised growth fund from Peepul Capital for its next level of growth
- **KRÁTA CORP ADVISERS** advised ECOM Express and the Promoters, from legal perspective, in their negotiations & finalisation of various transaction documents with Peepul Capital
- **KRÁTA CORP ADVISERS** also advised the Angel Investors, from legal perspective, in their negotiations & finalisation of the transaction documents with Peepul Capital

*Logos are of the respective organisations and as prevalent at the time of the transaction*

## Shyam Metals IPO – Advisor to the Company (2021)

[illegible]

Bandra Kurla Complex  
Mumbai 400 051  
Tel: +9122 6849 7400  
Email: [kunal.naik@investec.co.in](mailto:kunal.naik@investec.co.in)  
Website: <https://www.investec.com/india.html>  
Contact person: Kunal Naik  
SEBI Registration No: INZ000007138

**SBICAP Securities Limited**  
Marathon Futorex, B-Wing, Unit 1201, 12<sup>th</sup> Floor,  
N. M. Joshi Marg, Lower Parel East, Mumbai - 400 013  
Tel: 022-42273300  
Email: Archana.Dedhia@sbicapsec.com  
Website: www.sbicapsec.com  
Contact person: Archana Dedhia  
SEBI Registration No: INZ000200032

**Indian Legal Counsel to our Company**

**J. Sagar Associates**  
Vakils House  
18 Sprott Road, Ballard Estate  
Mumbai 400 001  
Maharashtra, India  
Tel: +91 22 4341 8600

### International Legal Counsel to the BRLMs

**Squire Patton Boggs (MEA) LLP**  
Dubai International Financial Centre (DIFC)  
Burj Daman Office Tower, Level 10  
Dubai 111713  
United Arab Emirates  
Tel: +971 4447 8700

**Legal Counsel to the BRLMs as to Indian Law**

**IndusLaw**  
#1502B, 15th Floor,  
Tower – 1C,  
“One World Centre”,  
Senapati Bapat Marg,  
Lower Parel,  
Mumbai – 400 013  
Telephone: +91 22 4920 7200

**Advisor to our Company**  
**KRATA CORP ADVISERS**  
 122, Trinity Building  
 A.P. Market  
 S.S. Gaikwad Road, Marine Lines,  
 Mumbai – 400 002  
 Tel: +91 98206 37628  
 Email: shyamipo@krata.co.in  
 Contact Person: Kashvay H. Choksi

### Statutory Auditors to our Company

**S K Agrawal and Co Chartered Accountants LLP**  
Suite 606-608, The Chambers  
1865, Rajdanga Main Road  
Opposite Gitanjali Stadium  
Kolkata 700 107  
West Bengal, India  
E-mail : [info@skagrawal.co.in](mailto:info@skagrawal.co.in)  
Tel : +91 9681706868  
Firm Registration No. : 306033E/ E300272

Appasaheb Marathe Marg  
Prabhadevi, Mumbai 400 025, India  
Tel: 022-61363400  
Email: Surajit.misra@jmfml.com/deepak.vaidya@jmfml.com/  
sona.verghese@jmfml.com/t.n.kumar@jmfml.com  
Website: www.jmffinancialservices.in  
Contact person: Surajit Misra/ Deepak Vaidya/ T N  
Kumar/Sona Verghese  
SEBI Registration No: INZ000195834

*Relevant extracts from the RHP filed. Logos are of the respective organisations and as prevalent at the time of the transaction*

# Shyam Metals IPO – Advisor to the Company (2018)

**DRAFT RED HERRING PROSPECTUS**  
 Dated: August 6, 2018  
*(The Draft Red Herring Prospectus will be updated upon filing with the RoC)*  
*(Please read Section 32 of the Companies Act, 2013)*  
 100% Book Built Issue



## SHYAM METALS AND ENERGY LIMITED

Shyam Metals and Energy Limited ("Company") was originally incorporated as Shyam DRI Power Limited on December 10, 2007 at Kolkata, West Bengal, India as a public limited company under the Companies Act, 1956 and received the certificate for commencement of business from the Registrar of Companies, West Bengal at Kolkata ("RoC") on December 11, 2007. Subsequently, the name of our Company was changed to Shyam Metals and Energy Limited vide a special resolution passed by our Shareholders on November 23, 2009, and a fresh certificate of incorporation consequent upon change of name was issued by the RoC on January 5, 2010. For details of the change in the name and registered office of our Company, see "History and Certain Corporate Matters" on page 168.

**Registered and Corporate Office:** Trinity Tower, 7<sup>th</sup> Floor, 83, Topica Road, Kolkata – 700046, West Bengal, India  
**Contact Person:** Binodita Kumar Jain, Company Secretary and Compliance Officer; Tel: +91 33 4016 4000; Fax: +91 33 4016 4025  
**E-mail:** compliance@shyamgroup.com, Website: www.shyammetals.com  
**Corporate Identity Number:** U40101WB2007PLC004971

**OUR PROMOTERS:** MAHABIR PRASAD AGARWAL, BRJ BHUSAN AGARWAL, SANJAY KUMAR AGARWAL, SUBHAM CAPITAL PRIVATE LIMITED, SUBHAM BUILDWELL PRIVATE LIMITED, NARAYAN DEAL/CODAL LIMITED, KALPATEK HOUSEHOLD & TRADING PRIVATE LIMITED, DORITE TRACON PRIVATE LIMITED AND TOPRIGHT MERCANTILES PRIVATE LIMITED.

**INITIAL PUBLIC OFFER OF UP TO (a) EQUITY SHARES OF FACE VALUE OF ₹10 EACH ("EQUITY SHARES") OF SHYAM METALS AND ENERGY LIMITED ("COMPANY") OR ("ISUER") FOR CASH AT A PRICE OF (b) PER EQUITY SHARE (INCLUDING A SHARE PREMIUM OF ₹1) PER EQUITY SHARE ("ISSUE PRICE"), AGGREGATING UP TO ₹5,000 MILLION ("ISSUE"). THE ISSUE SHALL CONSTITUTE 45% OF THE POST-ISSUE PAID-UP EQUITY SHARE CAPITAL OF OUR COMPANY. THE ISSUE INCLUDES A RESERVATION OF UP TO 14% OF THE EQUITY SHARES, AGGREGATING UP TO ₹90 MILLION, FOR SUBSCRIPTION BY ELIGIBLE EMPLOYEES (AS DEFINED HEREIN) NOT EXCEEDING 5% OF OUR POST-ISSUE PAID-UP EQUITY SHARE CAPITAL (THE "EMPLOYEE RESERVATION PORTION"). THE ISSUE LESS THE EMPLOYEE RESERVATION PORTION IS HEREINAFTER REFERRED TO AS THE "NET ISSUE". THE NET ISSUE SHALL CONSTITUTE (a) 7% AND (b) 7%, RESPECTIVELY, OF THE POST-ISSUE PAID-UP EQUITY SHARE CAPITAL OF OUR COMPANY. THE FACE VALUE OF THE EQUITY SHARE IS FIVE INCHES THE PRICE BAND, THE RETAIL DISCOUNT, THE EMPLOYEE DISCOUNT AS APPLICABLE, AND THE MENDM BIDDLOT WILL BE DECIDED BY OUR COMPANY IN CONSULTATION WITH THE BOOK RUNNING LEAD MANAGERS ("BRLMs") AND WILL BE ADVERTISED IN ALL EDITIONS OF (a), AN ENGLISH NATIONAL NEWSPAPER, ALL EDITIONS OF (a), A HINDI NATIONAL NEWSPAPER AND KOLKATA EDITION OF (a), A BENGALI NEWSPAPER, (WHICH ARE WIDELY CIRCULATED IN ENGLISH, HINDI AND BENGALI BEING THE REGIONAL LANGUAGE OF WEST BENGAL, WHERE OUR REGISTERED AND CORPORATE OFFICE IS LOCATED, AT LEAST FIVE WORKING DAYS PRIOR TO THE BID/ISSUE OPENING DATE AND SHALL BE MADE AVAILABLE TO THE BSE LIMITED ("BSE") AND THE NATIONAL STOCK EXCHANGE OF INDIA LIMITED ("NSE"), AND TOGETHER WITH BSE, THE "STOCK EXCHANGES") FOR THE PURPOSE OF UPLOADING ON THEIR WEBSITES.**

\*A discount of up to (a) % on the Issue Price may be offered to Retail Individual Investors ("Retail Discount") equivalent to (a) % per Equity Share and to Eligible Employees Bidding in the Employee Reservation Portion ("Employee Discount") equivalent to (a) % per Equity Share.

In case of any revision to the Price Band, the Bid Issue Period will be extended by at least three additional Working Days after such revision of the Price Band, subject to the Bid Issue Period not exceeding 10 Working Days. Any revision to the Price Band and the revised Bid Issue Period, if applicable, will be widely disseminated by notification to the Stock Exchanges, by issuing a press release, and also by indicating any change on the websites of the BSE and at the terminals of the Syndicate Members and by intimation to the Designated Intermediaries.

The Issue is being made in terms of Rule 19(2)(vii) of the Securities Contracts (Regulation) Rules, 1957, as amended ("SCRR"), read with Regulation 41 of the SEBI ICDR Regulations. The Issue is being made in accordance with Regulation 20(1) of the SEBI ICDR Regulations, through the Book Building Process wherein not more than 5% of the Net Issue shall be allocated on a proportionate basis to Qualified Institutional Investors ("QIIs") or QIBs. The QIBs may subscribe up to 5% of the QIB Portion to Anchor Investors on a discretionary basis in accordance with the SEBI ICDR Regulations, out of which one-third shall be reserved for domestic Mutual Funds only, subject to valid Bids being received from domestic Mutual Funds at or above the Anchor Investor Issue Price, in accordance with the SEBI ICDR Regulations. 5% of the QIB Portion (excluding the Anchor Investor Portion) shall be available for allocation on a proportionate basis to Mutual Funds only, and the remainder of the QIB Portion shall be available for allocation on a proportionate basis to all QIBs (other than Anchor Investors), including Mutual Funds, subject to valid Bids being received at or above the Issue Price. Further, not less than 15% of the Net Issue shall be available for allocation on a proportionate basis to Non-Institutional Bidders and not less than 10% of the Net Issue shall be available for allocation to Retail Individual Bidders in accordance with the SEBI ICDR Regulations, subject to valid Bids being received at or above the Issue Price. All potential investors, other than Anchor Investors, are required to mandatorily submit the Application Supported by Blocked Amount ("ASBA") process providing details of their respective bank accounts which will be blocked by the Self-Certified Syndicate Banks ("SCSBs"). For details, see "Issue Procedures" on page 154.

### RISK IN RELATION TO THE FIRST ISSUE

This being the first public issue of our Company, there has been no formal market for the Equity Shares of our Company. The face value of the Equity Shares is ₹10 and the Face Price is (a) times the face value and the Case Price is (a) times the face value (determined and justified by our Company) in consultation with the BRLMs as stated under "Basis of Issue" on page 14. (a) should not be taken to be indicative of the market price of the Equity Shares after the Equity Shares are listed. No assurance can be given regarding an active or sustained trading in the Equity Shares or regarding the price at which the Equity Shares will be traded after listing.

### GENERAL RISKS

Investments in equity and equity related securities involve a degree of risk and investors should not invest any funds in the Issue unless they are able to take the risk of losing their entire investment. Investors are advised to read the risk factors carefully before taking an investment decision in the Issue. For taking an investment decision, investors must rely on their own examination of our Company and the Issue, including the risks involved. The Equity Shares in the Issue have not been recommended or approved by the Securities and Exchange Board of India ("SEBI"), nor does SEBI guarantee the accuracy or adequacy of the contents of the Draft Red Herring Prospectus. Specific attention of the investors is invited to "Risk Factors" on page 14.

### COMPANY'S ABSOLUTE RESPONSIBILITY

Our Company, having made all reasonable enquiries, accepts responsibility for and confirms that this Draft Red Herring Prospectus contains all information with regard to our Company and the Issue, which is material in the context of the Issue, that the information contained in this Draft Red Herring Prospectus is true and correct in all material aspects and is not misleading in any material respect, that the opinions and statements expressed herein are honestly held and that there are no other facts, the omission or inclusion of which makes this Draft Red Herring Prospectus in a whole or in any of such information, or the expression of any such opinions or statements, misleading in any material respect.

### LISTING

The Equity Shares offered through the Red Herring Prospectus are proposed to be listed on the Stock Exchanges. Our Company has received an in-principle approval from the BSE and the NSE for the listing of the Equity Shares pursuant to letters dated (a) and (b) respectively. For the purposes of the Issue, the Designated Stock Exchange shall be (a). A signed copy of the Red Herring Prospectus and the Prospectus shall be delivered for registration to the RoC, in accordance with Sections 20(4) and 32 of the Companies Act, 2013. For details of the material contracts and documents, which will be made available for inspection from the date of the Red Herring Prospectus up to Bid Issue Closing Date, see "Material Contracts and Documents" for inspection" on page 169.

### BOOK RUNNING LEAD MANAGERS

### REGISTRAR TO THE ISSUE

|  |   |  |   |   |
|--|---|--|---|---|
| <br><b>ICICI Securities Limited</b><br>ICICI Centre<br>H T Parkch Marg<br>Chhatrapati<br>Mumbai 400 029<br>Maharashtra, India<br>Tel: +91 22 2288 3400<br>Fax: +91 22 2282 6180<br>E-mail: shyam ipo@icicisecurities.com<br>Investor grievance email: customercare@icicisecurities.com<br>Website: www.icicisecurities.com<br>Contact Person: Sreyash Jain / Rupesh Kumar<br>SEBI Registration No.: INM000011179 | <br><b>Edelweiss Financial Services Limited</b><br>14th Floor, Edelweiss House<br>OFF C S T Road, Kolkata<br>Mumbai 400 008<br>Maharashtra, India<br>Tel: +91 22 4009 4400<br>Fax: +91 22 4006 3410<br>E-mail: shyammetals ipo@edelweissfin.com<br>Investor grievance e-mail: customercare@edelweissfin.com<br>Website: www.edelweissfin.com<br>Contact Person: Disha Doshi / Mihir Mehta<br>SEBI Registration No.: INM0000010650 | <br><b>IIFL Holdings Limited</b><br>14th Floor, IIFL Centre, Kamala City,<br>Senapati Bager Marg, Lower Park<br>(West),<br>Mumbai 400 013<br>Maharashtra, India<br>Tel: +91 22 4646 4000<br>Fax: +91 22 2493 1071<br>E-mail: shyam ipo@iifl.com<br>Investor grievance e-mail: investor.grievance@iifl.com<br>Website: www.iifl.com<br>Contact Person: Pankaj Bhattacharyya / Nishita Mody<br>SEBI Registration No.: INM000010940 | <br><b>JM Financial Limited</b><br>7th Floor, Century<br>Apparel's Mariner Marg<br>Prabhadevi, Mumbai 400 025<br>Maharashtra, India<br>Tel: +91 22 6630 3030<br>Fax: +91 22 6630 3310<br>E-mail: shyammetals ipo@jmf.com<br>Investor grievance E-mail: grievance@jmf.com<br>Website: www.jmf.com<br>Contact Person: Pradeep Datta<br>SEBI Registration No.: INM0000010161 | <br><b>Karvy Computershare Private Limited</b><br>Karvy Selenium, Tower B<br>Plot 31-32, Gachibowli<br>Financial District, Nanakramguda<br>Hyderabad 500 032<br>Tel: +91 40 6716 2222<br>Fax: +91 40 2343 1551<br>E-mail: customercare@karvy.com<br>Investor grievance email: shyammetals ipo@karvy.com<br>Website: http://karisma.karvy.com<br>Contact Person: M. Murali Krishna<br>SEBI Registration No.: INM0000002121 |
|--|---|--|---|---|

### BID/ISSUE PROGRAMME

**BID/ISSUE OPENS ON** (a) ☐ **BID/ISSUE CLOSES ON** (a) ☐

- Our Company may, in consultation with the BRLMs, consider participation by Anchor Investors in accordance with the SEBI ICDR Regulations. The Anchor Investor Bid Issue Period shall be one Working Day prior to the Bid Issue Opening Date.
- Our Company may, in consultation with the BRLMs, consider closing the Bid Issue Period for QIBs one Working Day prior to the Bid Issue Closing Date in accordance with the SEBI ICDR Regulations.

Contact Person: Pinak Bhattacharyya / Nishita Mody

SEBI Registration No.: INM000010940

Syndicate Members

[•]

### Indian Legal Counsel to our Company

**Cyril Amarchand Mangaldas**

201, Midford House, Midford Garden

Off MG Road

Bengaluru 560 001

Karnataka, India

Tel: +91 80 2558 4870

Fax: +91 80 2558 4266

### Indian Legal Counsel to the BRLMs

**J. Sagar Associates**

Vakils House

18 Sprott Road, Ballard Estate

Mumbai 400 001

Maharashtra, India

Tel: +91 22 4341 8600

Fax: +91 22 4341 8617

### Advisor to our Company

**KRATA CORP ADVISERS**

122, Trinity Building

A.P. Market

S.S. Gaikwad Road, Marine Lines,

Mumbai – 400 002

Tel: +91 98206 37628

Email: shyamipo@krata.co.in

Contact Person: Kashyap H. Choksi

### Statutory Auditors to our Company

**S.K. Agrawal & Co.**

Suite Nos: 606-608, The Chambers

Opposite Gitanjali Stadium

1865, Rajdanga Main Road

Kasba, Kolkata 700 107

West Bengal, India

E-mail: vivek@skagrawal.co.in

Tel: +91 33 4008 9902/9903/9904

Fax: +91 33 4008 9905

Firm Registration No.: 306033E

Peer Review Certificate Number: 008888

### Registrar to the Issue

**Karvy Computershare Private Limited**

Karvy Selenium, Tower B

Plot 31-32, Gachibowli

Financial District, Nanakramguda

Hyderabad 500 032

Tel: +91 40 6716 2222

Fax: +91 40 2343 1551

E-mail: einward.ris@karvy.com

Investor grievance email: shyammetals ipo@karvy.com

Website: http://karisma.karvy.com

Contact Person: M. Murali Krishna

SEBI Registration No.: INM0000002121

### Bankers to the Issue/ Escrow Collection Banks

[•]

### Refund Bank(s)/ Public Issue Account Bank(s)

Relevant extracts from the DRHP filed and cleared by SEBI.

Logos are of the respective organisations and as prevalent at the time of the transaction





## Emami Cement Ltd.



ENAMIL CEMENT LIMITED

Our Company was incorporated as "Kolkata Cement Limited" on June 13, 2007, as a public limited company under the Companies Act 1956, at Kolkata, West Bengal with a certificate of incorporation issued by the Registrar of Companies, West Bengal, at Kolkata (the "RoC"). We received our certificate of commencement of business on July 3, 2007. For details of the change in the registered office of our Company, see "History and Certain Corporate Matters" on page 153.

Corporate Identity Number: U18906WB2007PLC116503  
Registered Office: Acropolis, 15<sup>th</sup> Floor, 12555, Rajlaxmi Main Road, Kashi, Kollam 700 101, West Bengal, India  
Tel: +91 33-6027 1301; Fax: N/A. E-mail: [investor.relations@americanet.com](mailto:investor.relations@americanet.com); Website: [www.americanet.com](http://www.americanet.com)  
Contact Person: Debashis Banthia, Company Secretary and Compliance Officer; Tel: +91 33-6027 1301

[illegible]

THE PRICE BAND AND THE MEDIUM RED LOT ARE DECIDED BY OUR COMPANY IN CONSULTATION WITH THE BOOK CIRCULATING LEAD MANAGER ("BCLM") AND WILL BE ADVERTISED ON [H] EDITIONS OF [H] A WISDE CIRCULATED SINGAPORE NATIONAL DAILY NEWSPAPER, [H] EDITIONS OF [H] A WISDE CIRCULATED SINGAPORE NATIONAL DAILY NEWSPAPER, AND [H] EDITIONS OF [H] A WISDE CIRCULATED SINGAPORE NATIONAL DAILY NEWSPAPER. SPECIALS BEING THE REGIONAL LANGUAGE OF WEST SINGAPORE, WHERE OUR REGISTERED OFFICE IS LOCATED, AT LEAST FIVE WORKING DAYS PRIOR TO THE BIDS OPENING DATE (ON SUCH OTHER TIME PERIOD AS PRESCRIBED UNDER THE APPLICABLE LAWS), AND SHALL BE MADE AVAILABLE TO THE LIMITED ("LIMITED"), NATIONAL STOCK

[illegible][illegible]

**RISKES IN RELATION TO THE FIRST OFFERS**

The listing on the public market of the Equity Shares, upon the basis on which the first offers of the Equity Shares, the last value of one Equity Shares is \$1.00 and the First Price and Cap: From one (24) cents and 24 cents of the last value of the Equity Shares, respectively. The First Price is determined and justified by our Company, in consultation with the M&A, at our meeting with the US SEC Staff Registration, and as stated in "Market for the First Offer" on page 10 of the Prospectus. The First Price is the last value of the Equity Shares after the Equity Shares are listed. No assurance can be given regarding the outcome of our registration in the Equity Shares or regarding the price at which the Equity Shares will be traded after listing.

**GENERAL RISKS**

Investments in equity and equity-related securities involve a degree of risk and investors should not invest any funds in the Offer unless they are willing to take the risk of losing their entire investment. Investors are advised to read the risk factors carefully before taking an investment decision in the Offer. The following are investment risks, investors may rely on their own examination of any Company and the Offer, including the risks referred to. The Equity Shares have not been recommended or approved by the Securities and Exchange Board of India ("SEBI"), we deem the SEBI guidance the accuracy or adequacy of the contents of this Draft Red Herring Prospectus. Prospective

**ISSUES AND SELLING SHAREHOLDERS' ABSOLUTE RESPONSIBILITY**

**LISTING**

The Equity Shares issued through the End Haring Prospectus are prepared to be listed on the Stock Exchange. We have considered as principle applicants from IPO and IPO for the listing of the Equity Shares pursuant to Rules 12(1) and 14(1) respectively. For the purposes of the CFI, [a] in the Designated Stock Exchange. A copy of the End Haring Prospectus and the Prospectus shall be delivered to registration in the CFI in accordance with Section 56(1) of the Companies Act 2013. For details of the material contracts and documents available for inspection from the date of the End Haring Prospectus up to the IPO Offer Closing Date, see "Material Contracts and Documents for Inspection" on page 524.

| BOOK-ENDING LEAD MANAGERS  |  |  |   |  | REGISTER TO THE OFFER  |  |
|--|--|--|---|--|--|--|
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<sup>10</sup> Our Company, in consultation with the NCUA's, may decide to close the Bid Offer Period for QIBs one Working Day prior to the Bid Offer Closing Date, in accordance with the 2003 NCUA Regulations.

Relevant extracts from the DRHP filed and cleared by SEBI. Awaiting right market opportunity to launch IPO. Logos are of the respective organisations and as prevalent at the time of the transaction

**Emami Paper Mills Ltd.**  
**Advised on listing on NSE**

**emami\***  
**PAPER**  
**MILLS LTD**



Listing of Equity Securities on  
National Stock Exchange of  
India Limited  
(NSE)

Company was earlier listed  
only on BSE Ltd.

**KRÁTA CORP ADVISERS**  
**WE HELP YOU GROW** 





Re-classification of some  
members of the Promoter  
Group to Public Category

5 Applications

(including 2 applications which were complicated)



Listing of Commercial Papers  
on BSE Limited  
(BSE)

Handled them in the entire  
process for listing of 12 tranches  
of CP on BSE

(including seeking condonation for delay from SEBI)

# On-going Transactions

## Capital Raising / Strategic Acquisition / Divestment

Advising a company in the API & Specialty Chemical segment to raise private equity capital

Advising a company in the Financial Products Distribution to raise private equity capital

Advising a company in ready to cook food segment to raise growth capital

Acquisition of Hotel properties across key regions in India

## IPO Handholding Services / Regulatory compliances

Advising a Company in Western Maharashtra for their IPO

Advising a listed company for their Demerger and meeting regulatory compliances from SEBI and Stock Exchange perspective

Advising a listed company for reclassification of Promoter Group Holding

Advising an entity in retail segment to consolidate their multiple business outlets across India

*Names withheld for confidentiality purposes, The above are a select few transactions*

# Capital Markets - Select Transactions - IPOs



DEN Networks  
(INR 365 cr)



TD Power Systems  
(INR 227cr)



Cinemax India  
(INR 108 cr)



DRHP of  
Reid & Taylor  
(India)  
(INR 1,000 cr)



DRHP of  
Icomm Tele  
(INR 225 cr)



DRHP of Tara  
Health Foods  
(INR 180 cr)



Union Bank of  
India  
(INR 288 cr)



Bank of  
Maharashtra  
(INR 230 cr)



Allahabad Bank  
(INR 100 cr)

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction

# Capital Markets - Select Transactions - QIPs



United Breweries  
Holdings  
(INR 600 cr)



QIP of Opto  
Circuits  
(INR 400 cr)



Patel Engineering  
(INR 344 cr)



S.Kumars Nationwide  
(INR 232 cr)



Network 18 Media &  
Investments  
(INR 205 cr)



TV 18 Networks  
(INR 200 cr)



3i Infotech  
(INR 180 cr)



Karnataka Bank  
(INR 161 cr)



Diamond Power  
Infrastructure  
(INR 132 cr)



Unity Infraprojects  
(INR 73 cr)

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction



# Capital Markets - Select Transactions - Rights



United Breweries  
- ROCPS  
(INR 213 cr)



Electrolux  
Kelvinator  
(INR 200 cr)



EIH Associated  
Hotels  
(INR 109 cr)



Federal Mogul  
Goetze  
(INR 106 cr)



Alok Industries  
(INR 51 cr)



Antarctica  
(INR 10 cr)

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction

# Capital Markets – Select Transactions - Buyback, Delisting



Bayer CropScience

Buyback of shares  
Bayer Cropscience  
(INR 450 cr)



Buyback of shares  
TV Today Network  
(INR 20 cr)



Buyback of shares  
Jayshree Tea Ind.



Delisting  
Fixed Price - Rights  
Electrolux Kelvinator  
(INR 45 cr)



Delisting  
Reverse Book  
Building  
Vickers Systems



Delisting  
Reverse Book  
Building  
Karam Chand  
Thapar & Bros.

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction

# Mergers & Acquisitions - Select Transactions...

**HEIDELBERGCEMENT**

**mycem**

Strategic  
Acquisition and  
Open offer -  
Mysore Cements  
(INR 673 cr)

**DHL**  
**BLUE DART**

Strategic  
Acquisition and  
Open offer -  
Blue Dart  
(INR 733 cr)

  
**Reliance Capital**  
**ADLABS**

Strategic  
Acquisition and  
Open offer -  
Adlabs  
(INR 510 cr)

**WARBURG PINCUS**  
**Sintex**

PE and Open offer  
-  
Sintex Industries  
(INR 271 cr)

  
**Dabur**  
**fem**

Strategic  
Acquisition and  
Open offer -  
Fem Care  
(INR 260 cr)

  
**Fortis**  
**M A L A R**  
**H O S P I T A L**

Strategic  
Acquisition and  
Open offer -  
Malar Hospitals  
(INR 51 cr)

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction

# ...Mergers & Acquisitions - Select Transactions



\* Aborted transactions

The above is a select list only. Transactions handled by CA. Kashyap H Choksi during his stints with SBI Capital, Antique Capital and Ambit Corporate Finance  
Logos are of the respective organisations and as prevalent at the time of the transaction

## Thank you

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