



JSW Steel Limited Investor presentation

July 2018

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Forward looking and cautionary statement

Certain statements in this report concerning our future growth prospects are forward looking statements, which involve a number of risks, and uncertainties that could cause actual results to differ materially from those in such forward looking statements. The risk and uncertainties relating to these statements include, but are not limited to risks and uncertainties regarding fluctuations in earnings, our ability to manage growth, intense competition within Steel industry including those factors which may affect our cost advantage, wage increases in India, our ability to attract and retain highly skilled professionals, time and cost overruns on fixed-price, fixed-time frame contracts, our ability to commission mines within contemplated time and costs, our ability to raise the finance within time and cost client concentration, restrictions on immigration, our ability to manage our internal operations, reduced demand for steel, our ability to successfully complete and integrate potential acquisitions, liability for damages on our service contracts, the success of the companies in which the Company has made strategic investments, withdrawal of fiscal/governmental incentives, impact of regulatory measures, political instability, legal restrictions on raising capital or acquiring companies outside India, unauthorized use of our intellectual property and general economic conditions affecting our industry. The company does not undertake to update any forward looking statements that may be made from time to time by or on behalf of the company.



**JSW Group and
company
overview**

Key highlights

Appendix

JSW Group – overview



JSW Steel*

- Among India's leading integrated steel producers (Steel making capacity: 18 MTPA)
- Market capitalisation of US\$11.5bn^(a)



JSW Energy*

- Engaged across the value chain of power business
- Operational capacity: 4,531 MW
- Market capitalisation of US\$1.6bn^(a)



JSW Infrastructure

- Engaged in development and operations of ports
- Operational capacity 70MTPA



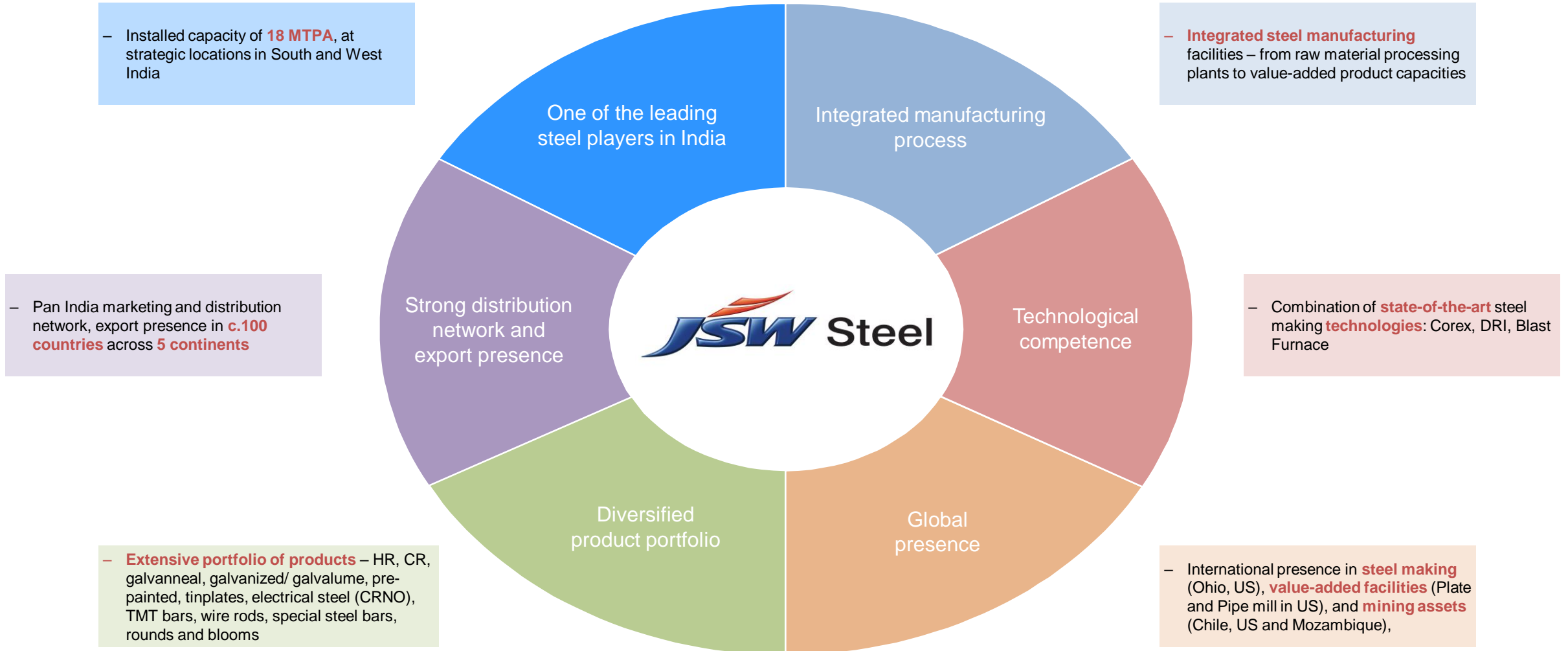
JSW Cement

- Manufacturer of Portland Slag Cement (PSC), Ordinary Portland Cement (OPC) and Ground Granulated Blast Furnace Slag (GGBS)
- Operational capacity 11.6MTPA

Presence across the core sectors

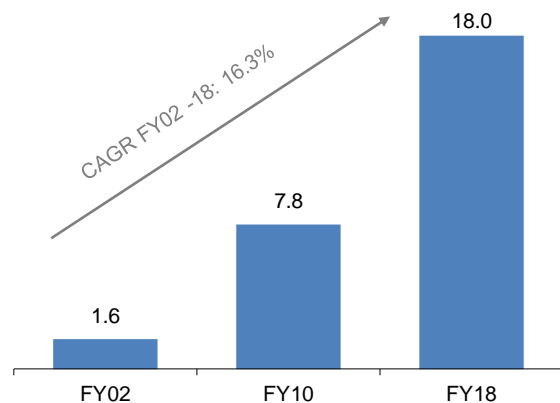
* Listed company
(a) As of 27-Jun-2018
Note: Translated at 1 USD = 68.5 INR
Source: Bloomberg, Company data

JSW Steel – among India’s leading steel manufacturers

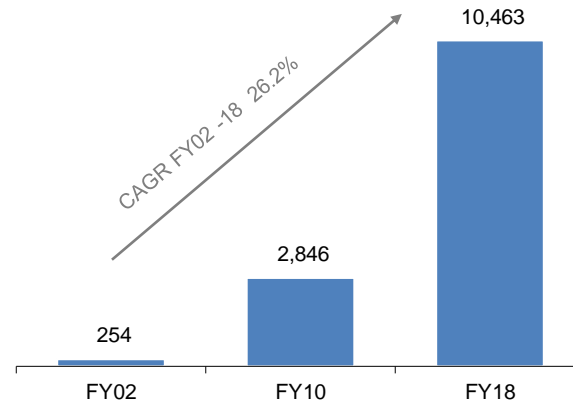


Transformational journey to market leadership

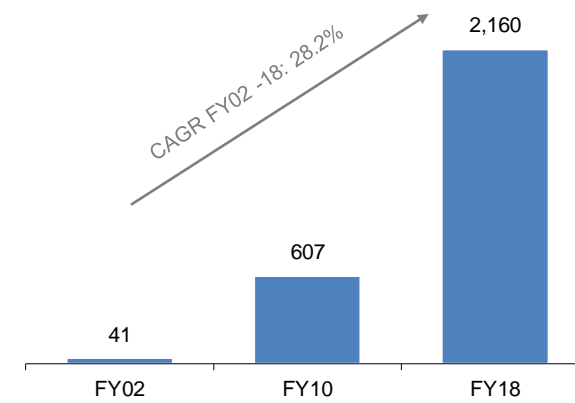
Capacity (MTPA)



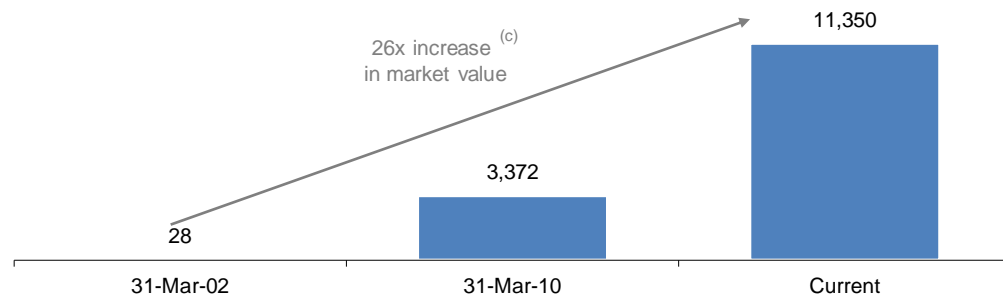
Total revenue (US\$m)^(a)



EBITDA (US\$m)^(a)



Market cap (U\$m)^(b)



	FY02	FY10	FY18	
Technology	Corex	Corex, BF	Corex, BF, DRI	• Adopting industry leading technologies
Product mix	Flats	Flats, long, special steel and value added	Flat, long, special steel, value added, AHSS for automotive, electrical steel, colour coated steel	• Continuously expanding product canvas with focus on high-end value-added products

Unrelenting value accretive growth through the economic cycles

Note: Translated at 1 USD = 68.5 INR

(a) Includes other income

(b) INR market cap numbers at all three points translated at 1 USD = 68.5 INR, "Current" market cap as of 27-Jun-2018

(c) Net of equity dilution

Source: Bloomberg, Company data



Key highlights

**JSW Group and
company
overview**

Appendix

Key highlights



1

Market leader and well placed to benefit from upcycle

2

Strong business profile diversified by region, markets and products

3

Strong focus on operational efficiency with globally renowned operations

4

Robust financial profile and stable cash flows

5

Prudent leverage management

6

Proven track record of growth through organic and inorganic expansions

7

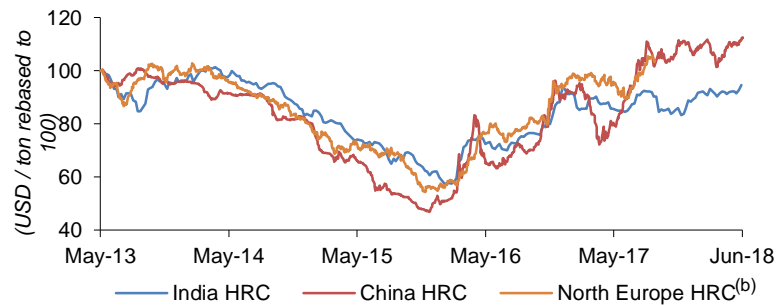
Experienced management with strong parentage

1 Market leader and well placed to benefit from upcycle

JSW Steel is a leading player in India

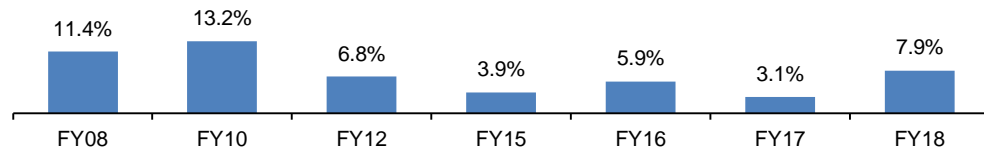


Steel prices have trended upward since Q1 CY16



Change since 1-Jan-16 ^(c)	
India HRC Mumbai	47.5%
China HRC	114.7%
North Europe HRC	86.4%

India apparent steel consumption expected to grow significantly



(a) As per National Steel Policy, 2017
 (b) North Europe HRC data available only till September 2017
 (c) Change until June 2018 for India HRC Mumbai and China HRC and until September 2017 for North Europe HRC
 Note:- Translated at 1USD= 68.5 INR

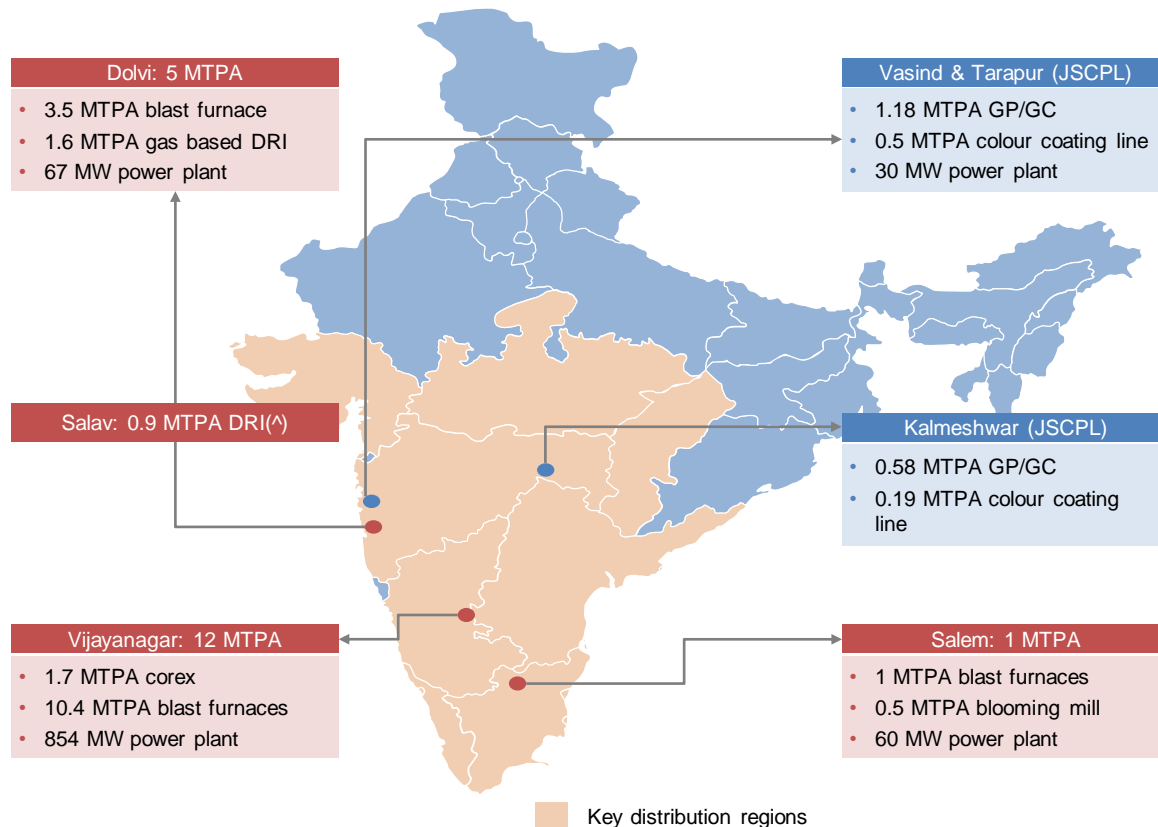
Buoyant steel market conditions

Indian market	<ul style="list-style-type: none"> Government focus on infrastructure development INR 5.97tn planned to be spent on infrastructure in FY19 National steel policy to achieve 300MT by 2030-31 Bank recapitalisation to help credit growth and restart investment cycle Current low per capita steel consumption (<65 kg per annum^(a)) Steel demand is expected to grow at 7.0%-8.0% over FY19 and FY20
Global market	<p>China</p> <ul style="list-style-type: none"> Accounts for c.50% of global steel production Decreasing exports from China due to: <ul style="list-style-type: none"> continuing closure of inefficient production facilities pollution-induced production curtailments strong domestic demand Utilization to remain high resulting in higher steel spreads <p>Europe</p> <ul style="list-style-type: none"> Supportive business conditions to result in robust steel demand growth Continued elevated steel spreads and stable profitability expectations <p>US</p> <ul style="list-style-type: none"> Driven by lower imports from China, US spreads have widened

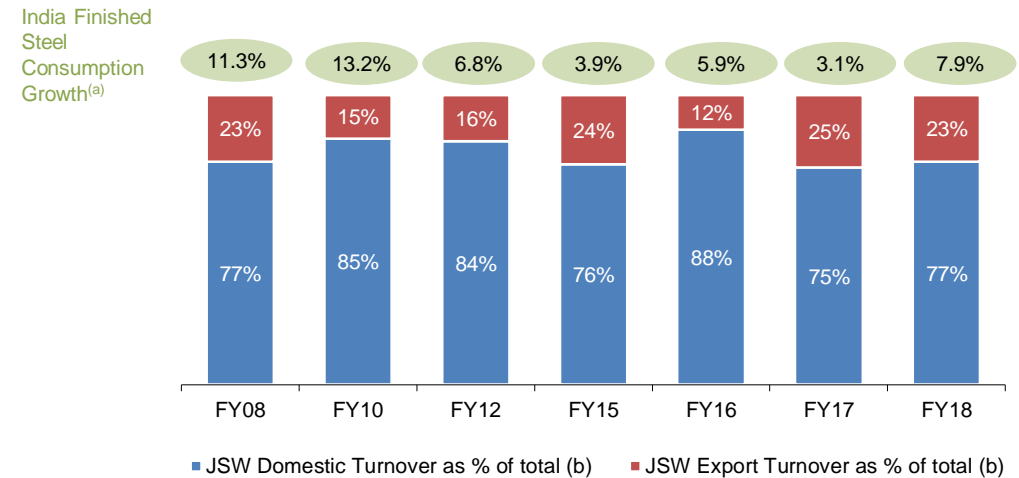
- Well placed to benefit from weaker global raw material prices
- Lower cost from recently won captive iron ore mines
- Stable margins through the cycle

Strong business profile diversified by region, markets and products

Geographically diversified with manufacturing facilities in South and West India along with strategic overseas presence



Flexibility to judiciously shift between domestic and international markets based on market conditions



- ✓ One of the largest exporter of steel products from India with export presence in over 100 countries
- ✓ Ability to re-align sales effort as per market conditions
- strategically reduced share of exports to 12% of total sales in FY16, as global steel consumption declined 3% YoY in CY15
- increased exports in FY17 and FY18 to leverage upon robust demand and pricing environment in international markets

Extensive geographical presence in India with nimble sales setup to shift sales judiciously between domestic market and exports

(a) As per IBEF, Joint Plant Committee

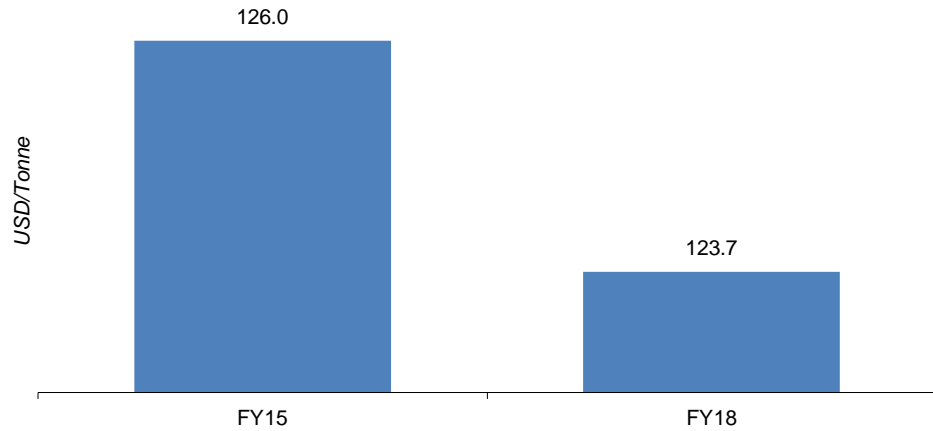
(b) Revenue from operations as per Ind-AS from FY16 onwards

Strong business profile diversified by region, markets and products (continued)

<p>Wide offering of flat and long products</p>																															
<p>Continuously increasing value added products</p>	<ul style="list-style-type: none"> ✓ Diversified portfolio to address growing demand for value-added steel ✓ Commissioned new facilities to further enrich product mix ✓ Leveraging JFE Steel's well-established manufacturing technology for advanced high strength steel (AHSS) for automotive <table border="1"> <caption>Total saleable steel (MTPA) by product category</caption> <thead> <tr> <th>Fiscal Year</th> <th>Total Saleable Steel (MTPA)</th> <th>Value added and special products (%)</th> <th>Special products (%)</th> <th>Other Products (%)</th> </tr> </thead> <tbody> <tr> <td>FY14</td> <td>11.85</td> <td>24%</td> <td>0%</td> <td>76%</td> </tr> <tr> <td>FY15</td> <td>12.08</td> <td>33%</td> <td>0%</td> <td>67%</td> </tr> <tr> <td>FY16</td> <td>12.25</td> <td>35%</td> <td>0%</td> <td>65%</td> </tr> <tr> <td>FY17</td> <td>14.68</td> <td>34%</td> <td>20%</td> <td>46%</td> </tr> <tr> <td>FY18</td> <td>15.55</td> <td>36%</td> <td>22%</td> <td>42%</td> </tr> </tbody> </table>	Fiscal Year	Total Saleable Steel (MTPA)	Value added and special products (%)	Special products (%)	Other Products (%)	FY14	11.85	24%	0%	76%	FY15	12.08	33%	0%	67%	FY16	12.25	35%	0%	65%	FY17	14.68	34%	20%	46%	FY18	15.55	36%	22%	42%
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<p>Focus on continuously enhancing product mix</p>																															

3 Strong focus on operational efficiency with globally renowned operations

JSW Steel has seen decreasing conversion costs^(a)



Ongoing cost benefit initiatives

Project	Expected commissioning	Description
Pellet Plant / Coke Oven Plant	August 2019 / March 2020	<ul style="list-style-type: none"> 8 MTPA Pellet plant at Vijayanagar to reduce dependency on more expensive iron ore lumps 1.5 MTPA coke oven plant at Vijayanagar to bridge gap in coke availability
Pipe Conveyor system	September 2018	<ul style="list-style-type: none"> To transport Iron ore from the yard to the Vijayanagar plant with the capacity of 20 MTPA Environmental friendly solution and reduction of transportation costs

Note: 1 USD = 68.5 INR

(a) Calculated as a sum total of employee benefit expenses and other expenses less exchange difference, commission on sales, donations, CSR expenses, allowance for doubtful advances, loss on sale of PPE and carriage and freight costs, divided by standalone annual crude steel volume

Parameter

Expanding Capacity	10 / 10	9	9	6	8	7	5
Location in high growth markets	10 / 10	9	6	7	6	7	4
Conversion costs; yields	10 / 10	8	9	8	10	7	10
Labor costs	10 / 10	7	7	9	8	8	6
Cost cutting efforts	9 / 10	7	10	8	6	8	7
Aggregate rank		17					



#1 ranked Indian player



#3 ranked Asian player

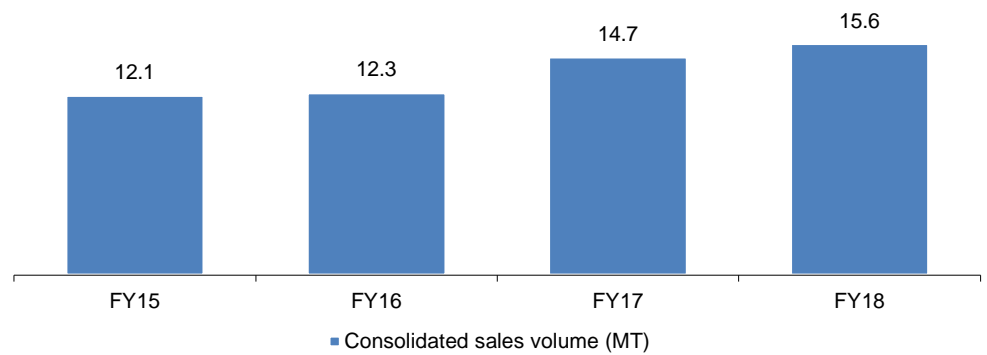


#6 ranked Global player

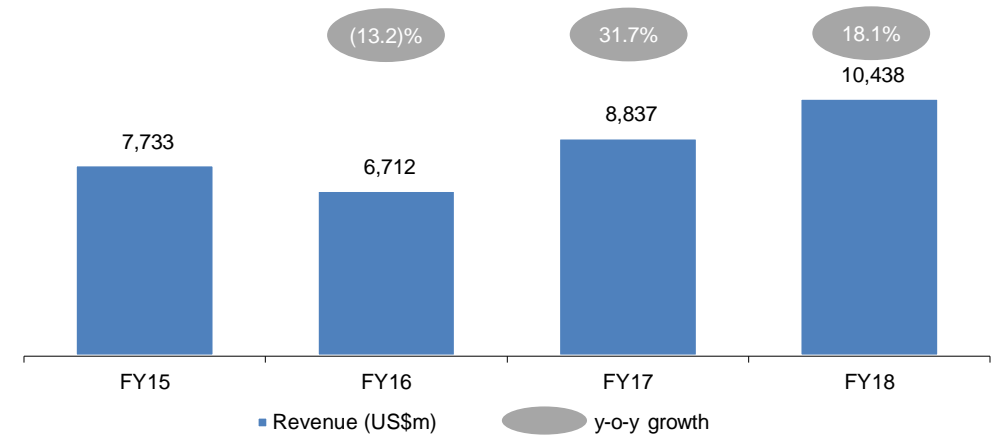
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Robust financial profile and stable cash flows

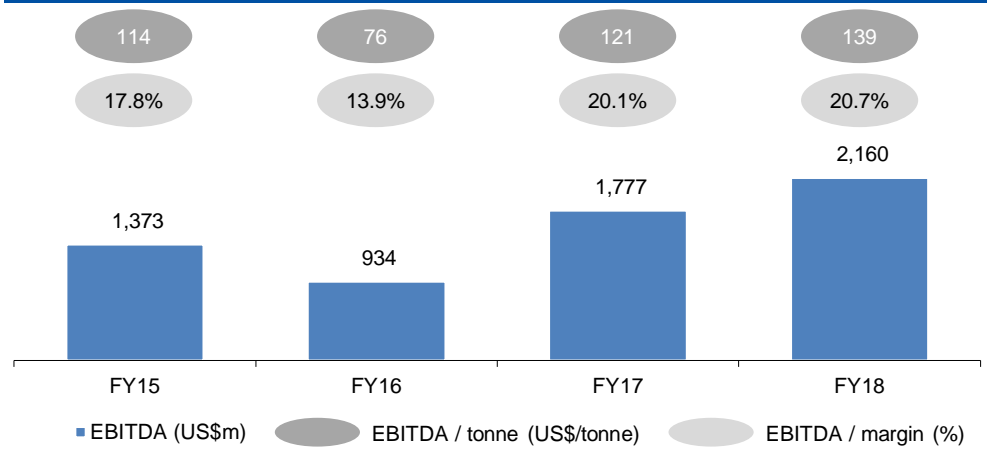
Strong track record of volume growth



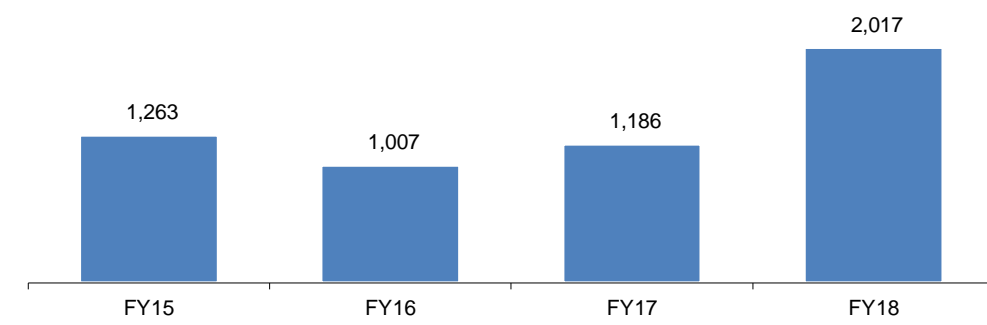
Continued positive momentum in operating revenues



EBITDA margin improvement of 294 bps from FY15 to FY18



Cashflow from operations (US\$m)



Note: 1 USD = 68.5 INR, consolidated financials
Based on consolidated sales volume

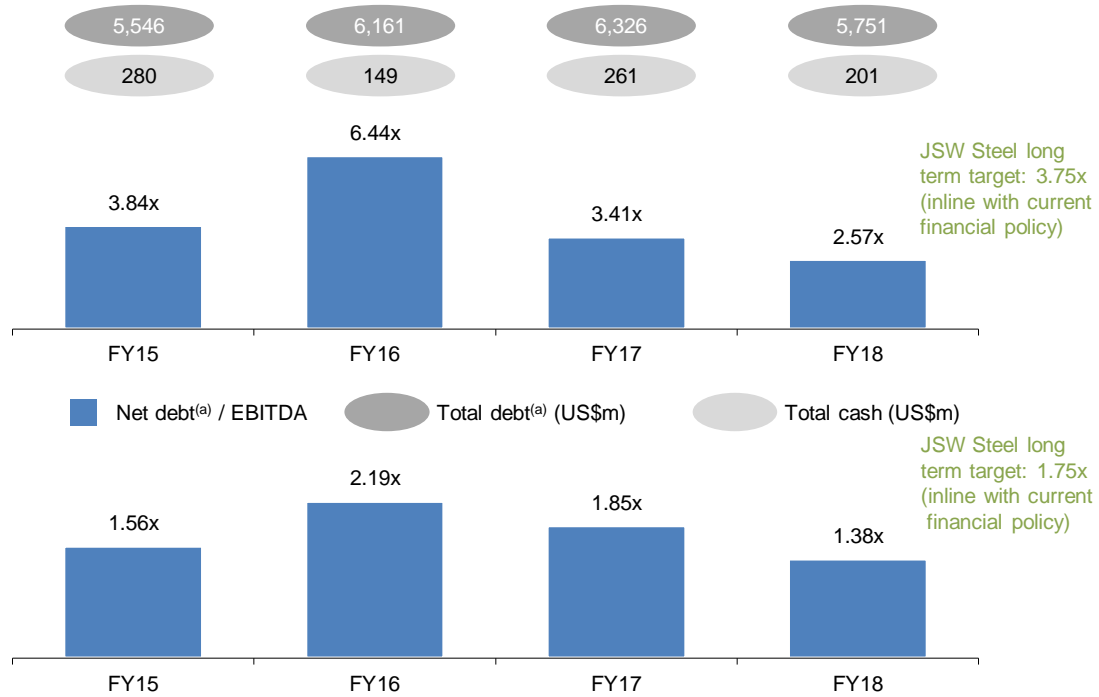
Source: Company data

5 Prudent leverage management

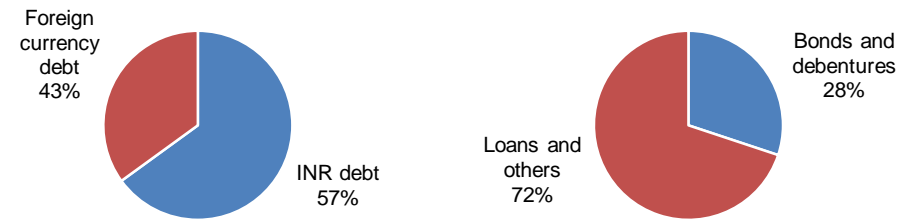
Publicly stated financial policies



Strong y-o-y profitability improvement -> reduction in net leverage

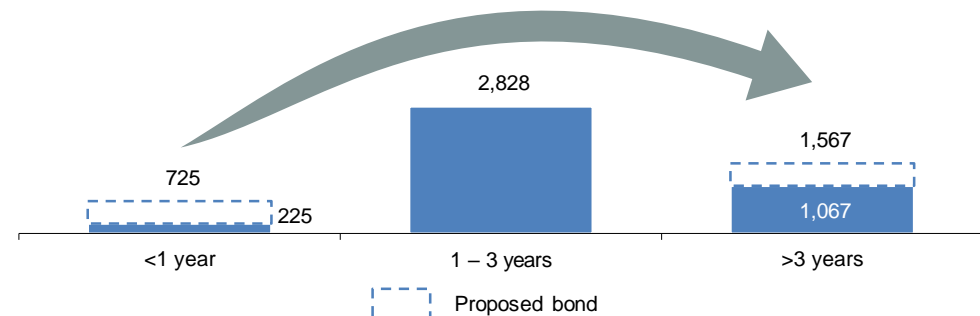


Diverse sources of funding ^(b)



- ✓ Financial flexibility to raise capital
- ✓ Strong relationships with over 50 banks / financial institutions with access to low cost credit
- ✓ Healthy mix with 43% of debt being foreign currency

Maturity profile of long term borrowings^(c) (US\$)



- ✓ Current refinancing to improve maturity profile

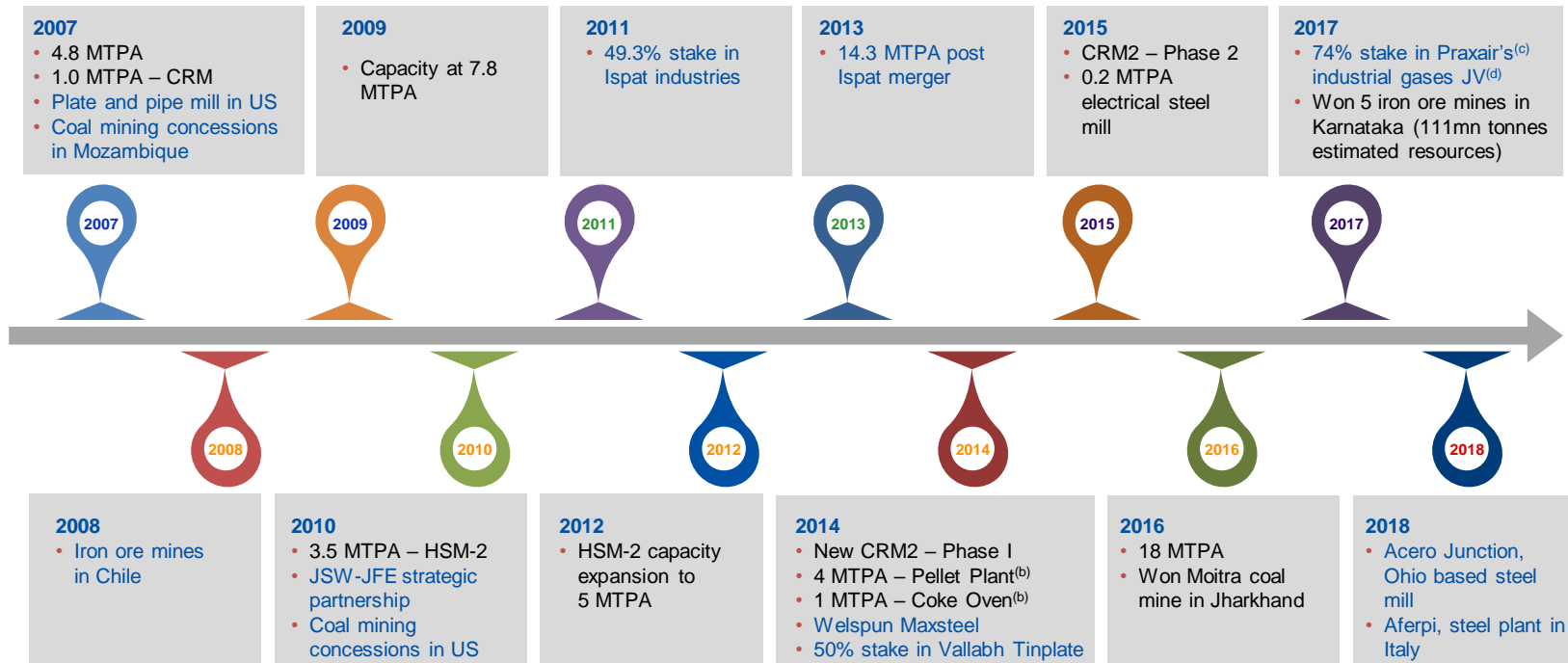
Note: 1 USD = 68.5 INR, consolidated financials

■ Net debt^(a) / Equity

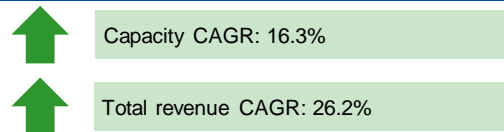
(a) Debt excludes acceptances
 (b) As of 31st March 2018
 (c) [Compares only loan terms as of March 2018]

Proven track record of growth through organic and inorganic expansions

Combination of organic and inorganic growth



CAGR FY2002 – FY2018



Continuously evaluating opportunities to deliver value enhancing growth

Key new projects

India

- Dolvi: Ongoing capacity expansion from 5 MTPA to 10 MTPA, to be further augmented to 10.66 MTPA
- Vijayanagar: Augmentation to 13 MTPA, BF-3 revamp and upgradation, CRM-1 complex capacity expansion
- Salem: Capacity expansion to 1.2 MTPA
- Vasind and Tarapur: Modernization-cum-capacity enhancement

International

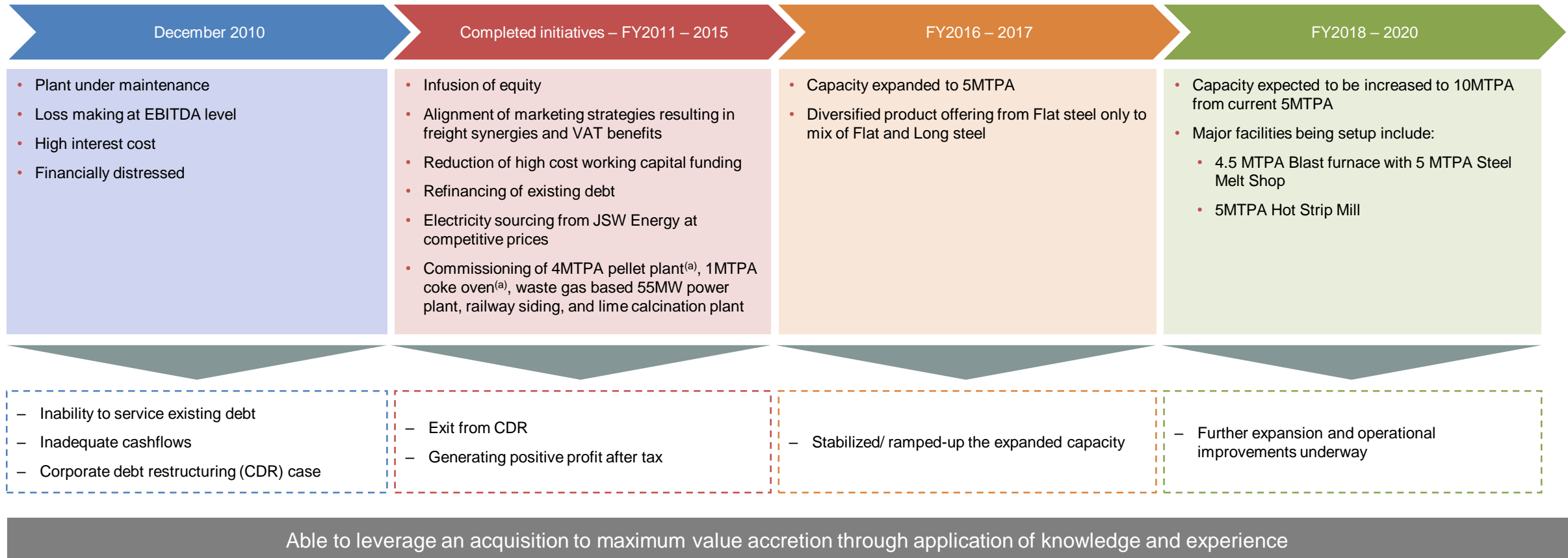
- Investment of USD 500mn in phases to develop steel manufacturing infrastructure in Baytown, Texas
 - USD 150mn brownfield investment to augment existing unit capabilities
 - Up to USD 350mn to setup a new hot end facility
- Integration of acquired Aferpi to build a strong foothold in the Italian and European markets
- Investment of upto US\$500m, in phases, to acquire and upgrade Acero Junction Inc, steel manufacturing unit at Ohio

Note: Highlighted portions indicate acquisitions
 (a) Southern Iron and Steel Company
 (b) Amba River Coke Limited
 (c) Praxair India Private Limited
 (d) JSW Praxair Oxygen Private Limited

6 Proven track record of growth through organic and inorganic expansions (continued)

Case study: Turnaround strategy at JSW Ispat's Dolvi plant

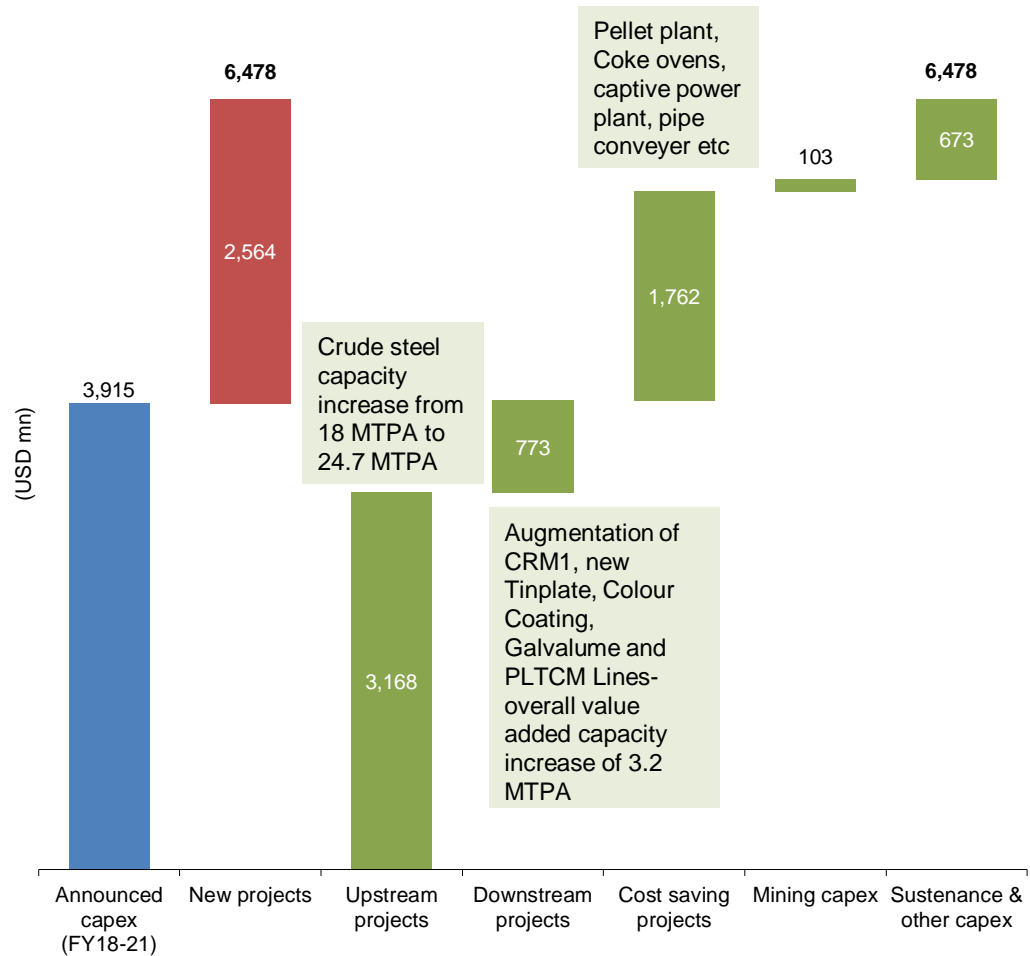
JSW Steel has a proven track record of identifying, acquiring and integrating assets creating synergies and optimizing costs



(a) Implemented in a wholly owned subsidiary Amba River Coke Limited

6 Proven track record of growth through organic and inorganic expansions (continued)

Detailed capex plan...



...based on a well thought-out guidelines / strategic rationale



Focus on return metrics instead of pure capacity addition



Well planned spread-out of capex into phases with run-rate value addition at the end of each phase



Funding for capex well thought-out with a significant percentage being funded through internal accruals



Track record of successful project execution on-time and within budget

Note: 1 USD = 68.5 INR

7 Experienced management with strong parentage

Chairperson — Emeritus



Savitri Devi Jindal

Promoter Director



Sajjan Jindal
Chairman and
Managing Director

Executive Directors



Seshagiri Rao M.V.S
Joint Managing Director
and Group CFO



Dr. Vinod Nowal
Dy. Managing Director



Jayant Acharya
Director
(Commercial and
Marketing)

Independent Directors



Malay Mukherjee
40yrs of rich experience
in mining and steel
industry



Kannan Vijayaraghavan (*)
FCA and Certified
Management Consultant



Dr. Vijay Kelkar (*)
Ex-Finance Secretary,
Ex-Secretary of MoP&G,
Ex-Chairman Finance
Commission



Dr. Punita Kumar Sinha
Former CIO at The Asia
Tigers Fund



Haigreve Khaitan
Senior Partner at
M/s. Khaitan & Co



Seturaman Mahalingam
CA, Ex-CFO of TCS, Ex
member of the
Tax Administration
Reform Commission

Nominee Directors



N. Jayaram, IAS
Nominee Director of
KSIIDC



Hiroyuki Ogawa
Nominee Director of JFE
Steel Corporation



JSW-JFE partnership

Partnership overview

- 14.99% minority stake bought by JFE in July 2010
- Access to cutting edge technologies
- Operational excellence for cost reduction
- Balance Sheet deleveraging to support growth

Technology agreements benefits:

- ✓ Access to fast growing auto steel market
- ✓ Technical know-how for electrical steel manufacturing
- ✓ Short learning curve
- ✓ Application engineering
- ✓ New product development
- ✓ Benchmarking and personnel training

Other benefits:

- ✓ Improvement in quality, productivity, yield, energy efficiency
- ✓ Sharing best maintenance, environment and safety practices
- ✓ Benchmarking, training and talent sharing
- ✓ Standardization of processes

(*) Retiring in the forthcoming Annual General Meeting

Conclusion



Market leadership

- Leading steel manufacturer in India
- Largest steel exporter in India
- 58% share of VASP and special products



Strong asset portfolio

- Geographically diversified with manufacturing facilities in South and West India
- Focus on flat steel products (approximately 72% of sales^(a)) with higher entry barriers, differentiated end-product and sticky customer base
- Wide product range and new product development targeted at capturing niche markets eg. AHSS for auto, electrical steel for electrical motors, generators, power plants
- Flexibility to shift sales between domestic and international markets based on market conditions



Well placed to capitalize on improving macro environment

- Well placed to benefit from flexible raw material blends
- Lower cost from recently won captive iron ore mines of cumulative 4.7 MTPA^(b) since 2015
- Two of the five iron ore mines already operational
- Planned low cost and returns accretive capex and brownfield expansions to further catalyze growth



Strong growth with improving leverage and robust financial profile

- Strong balance sheet position with net leverage reduced from 3.80x in FY15 to 2.57x in FY18
- Continuous evaluation of financing avenues to elongate maturity profile and optimise borrowing costs

(a) FY18 consolidated figure
(b) Broker research



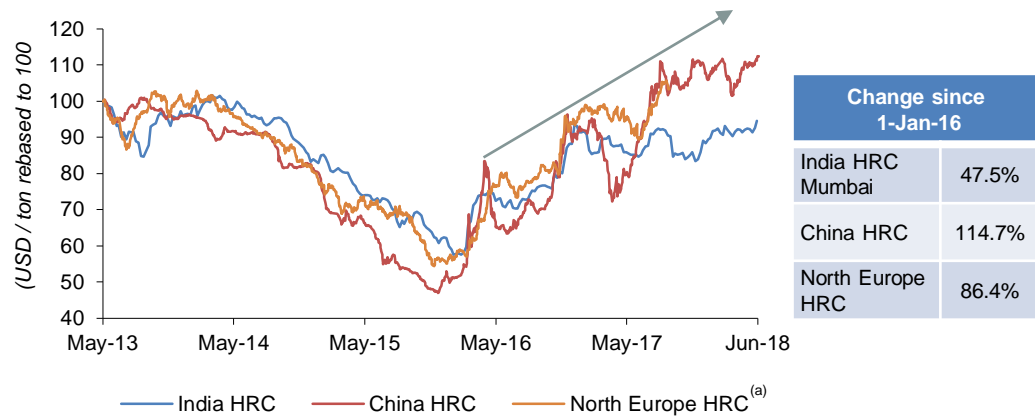
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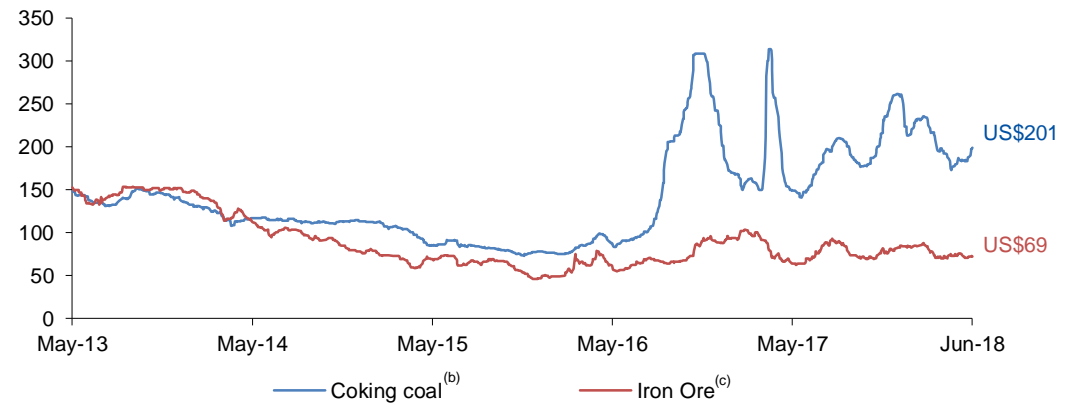
Appendix

Steel spreads have improved by US\$209/tonne since December 2015

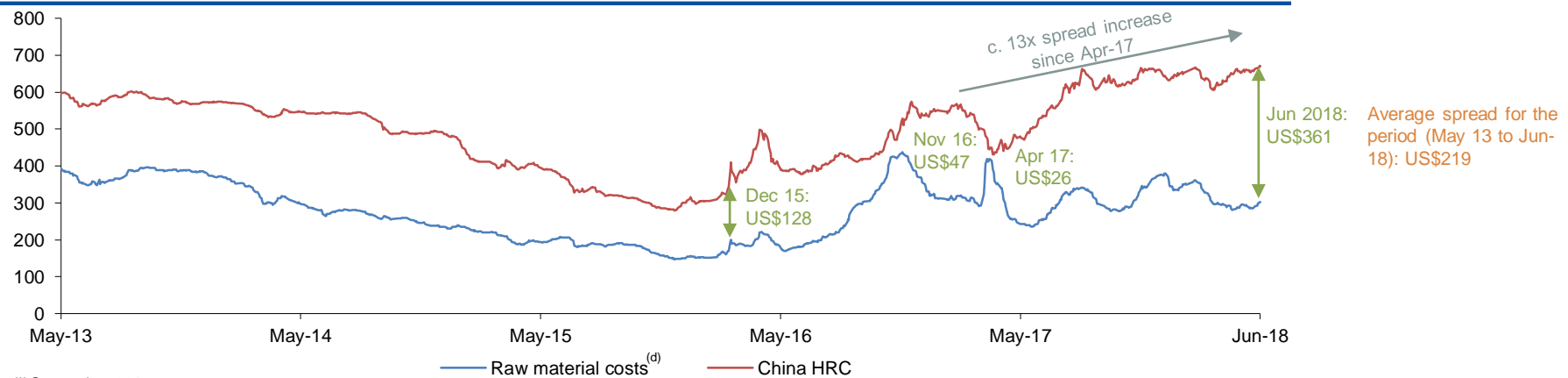
Steel prices have trended upward since Q4 CY15



Raw material price trends (US\$/tonne)



Steel spreads (US\$/tonne)

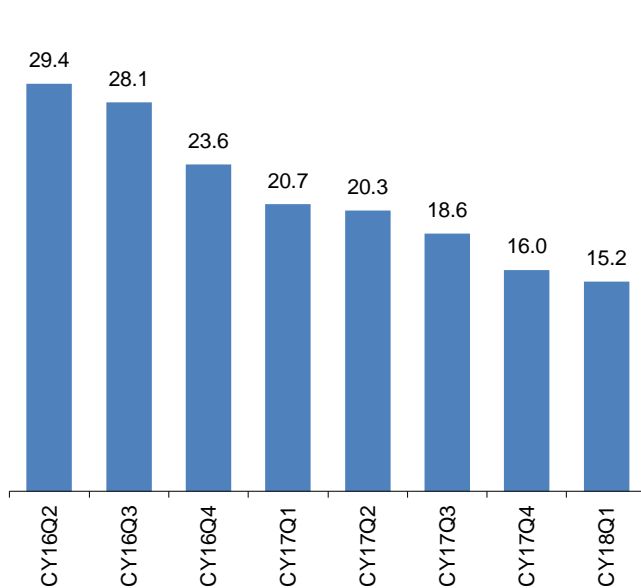


- (a) North Europe HRC data available only till September 2017
- (b) SBB premium hard coking coal - FOB east coast port
- (c) Iron-Ore delivered to Qindago China - 62% ferrous content
- (d) Raw material costs calculated as 1.7 times the Iron ore prices plus 0.9 times coking coal prices

Source: Bloomberg, broker research

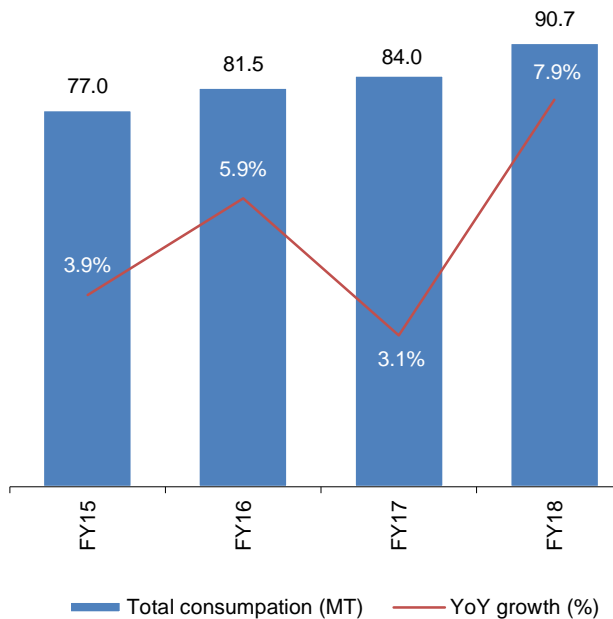
Reducing Chinese steel exports supplemented with strong fundamental for domestic consumption growth

China steel exports (MT)



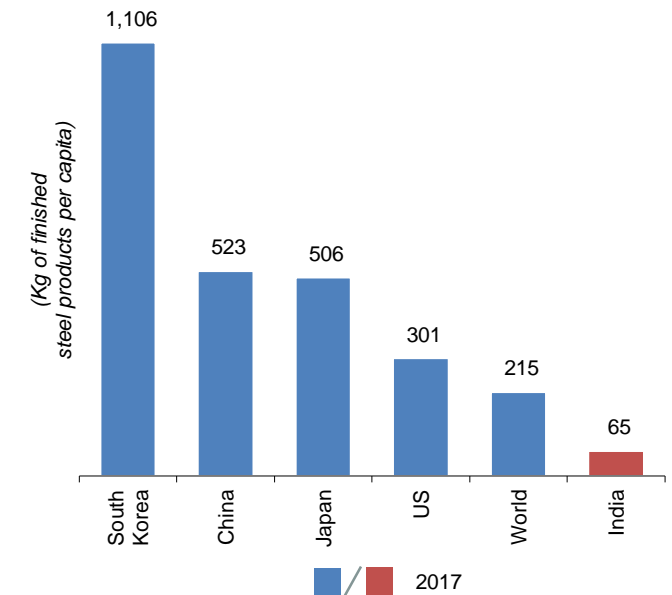
- ✓ China has closed most of its outdated and inefficient induction furnaces
- ✓ The government has introduced pollution-induced production curtailments
- ✓ Strong domestic demand in China

Positive India steel consumption environment



- ✓ Total consumption of steel was 90.7 MT in FY18 as compared to 84.0 MT in FY17
- ✓ Real steel consumption has grown at a CAGR FY08-FY18 of 5.7%
- ✓ Strong growth in steel end-user sector to drive demand

Significant room for improvement in per-capita consumption in India



- ✓ Lower per capita consumption compared to international average
- ✓ Infrastructure, oil and gas and automotives expected to drive the growth of the industry
- ✓ Improving policy support from the central government

Consolidated Financials



Particulars (US\$m) ^(a)	FY-15	FY-16	FY-17	FY-18
Operating revenue ^(b)	8,259	6,712	8,837	10,438
Operating EBITDA	1,373	934	1,777	2,160
% margin	17%	14%	20%	21%
Profit before tax	371	(360)	749	1149
Profit after tax	262	(70)	506	892
Shareholder's equity ^(c)	4,995	1,794	3,279	4,022
Net Debt	9,141	3,785	6,066	5,550
Net Debt / EBITDA	3.84x	6.44x	3.41x	2.57
Net Debt / Equity	1.56x	2.19x	1.85x	1.38

FY15 financials as per Indian GAAP; FY16, FY17, and FY18 financials as per Ind-AS

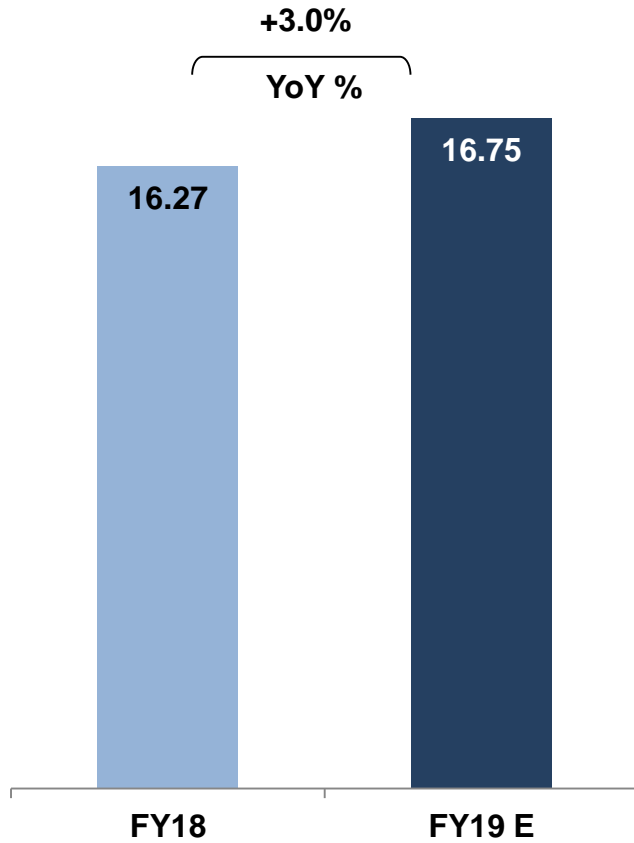
(a) Translated at 1 USD = 68.5 INR

(b) FY15 operating revenue is considered to be gross turnover

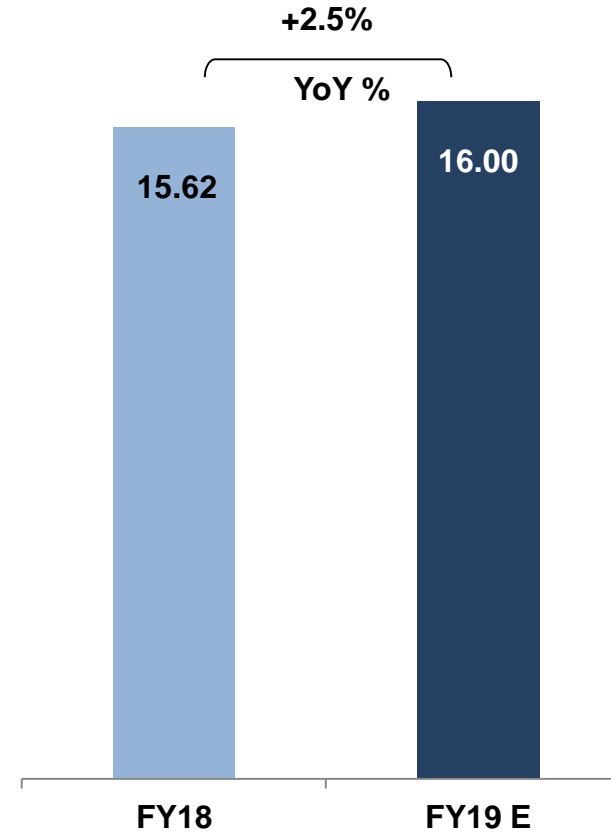
(c) Includes minority interest

Source: Company data

Volume guidance for FY19



Crude Steel Production



Saleable Steel Sales

Dolvi: increasing steel making capacity to 10 MTPA

- Total project cost – ₹15,000 crore (USD \$2,190M)
- Total capacity will be increased from 5 MTPA to 10 MTPA. The major facilities to be set-up under the expansion project are:
 - 4.5 MTPA Blast furnace with 5 MTPA Steel Melt Shop
 - 5 MTPA Hot Strip Mill
- Commissioning: by March 2020

Dolvi Augmentation to 10.66 MTPA

- Total project cost – ₹1,375 crore (USD \$200M)
- Increase DRI Capacity in Salav from 0.9 MTPA to 1.6 MTPA
- Modify and augment SMS at Dolvi for Hot Charging of DRI
- Commissioning: by March 2020

Vijayanagar Augmentation to 13 MTPA

- Total project cost – ₹2,300 crore (USD \$335M)
- Enhance SMS capacity, augment existing HSM and Wire Rod Mills to support enhanced BF-3 capacity
- Commissioning: by March 2020

Vijayanagar: BF-3 revamp and upgradation

- Total project cost – ₹1,000 crore (USD \$146M)
- BF-3 capacity will be increased to 4.5 MTPA after the revamp and up-gradation project
- Commissioning: by March 2020

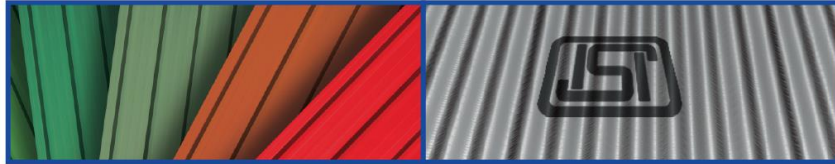
Note: 1 USD = 68.5 INR

Vijayanagar: CRM-1 complex capacity expansion	<ul style="list-style-type: none">➤ Total project cost – ₹2,000 crore (USD \$292M)➤ CRM1 complex capacity will be increased from 0.85 MTPA to 1.80 MTPA alongwith two Continuous Galvanizing Line of 0.45 MTPA each, a new 1.2 MTPA Continuous Pickling Line for HRPO products➤ Commissioning: by September 2019
Vasind and Tarapur: modernisation-cum-capacity enhancement	<ul style="list-style-type: none">➤ Total project cost – ₹1,730 crore (USD \$253M)➤ The modernisation cum capacity enhancement project includes:<ul style="list-style-type: none">▪ Increase in cold rolling capacity by 1.50 MTPA▪ increase in GI/GL capacity by 1.08 MTPA▪ increase in colour coating capacity by 0.28 MTPA➤ Commissioning: by September 2019
Downstream: modernisation-cum-capacity enhancement	<ul style="list-style-type: none">➤ Total project cost – ₹940 crore (USD \$137M)➤ The modernisation cum capacity enhancement project includes:<ul style="list-style-type: none">▪ Setting up Color Coating Line at Vijayanagar of 0.3 MTPA▪ Additional Tinplate Line at Tarapur 0.2 MTPA▪ Capacity enhancement of PPGL at Kalmeshwar by 0.22 MTPA➤ Commissioning: between September 2019 and March 2020

Note: 1 USD = 68.5 INR

Vijayanagar: Manufacturing Integration	<ul style="list-style-type: none">➤ Total project cost – ₹5,200 crore (USD \$759M)➤ Pellet plant 8 MTPA➤ Coke oven battery 1.5 MTPA➤ Commissioning: by March 2020
Dolvi – Captive Power	<ul style="list-style-type: none">➤ Total project cost – ₹975 crore (USD \$142M)➤ Instal 175 MW WHRB and 60 MW CPP to harness flue gases and steam from CDQ➤ Commissioning: by March 2020
Dolvi Coke Projects Phase 2	<ul style="list-style-type: none">➤ Total project cost – ₹2,050 crore (USD \$300M)➤ Phase 2: Second line of 1.5 MTPA coke oven battery along with CDQ➤ Commissioning: by June 2020

Note: 1 USD = 68.5 INR



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JSW Colouron
Premium Al-Zn Colour Coated Sheets
Excellent and innovative
mix of colour and durability

JSW Pragati
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Cost-effective coloured roofing solutions



JSW Trusteel
Premium Hot Rolled Sheets

JSW Neosteel
Pure TMT Bars
Foundation to every strong structure

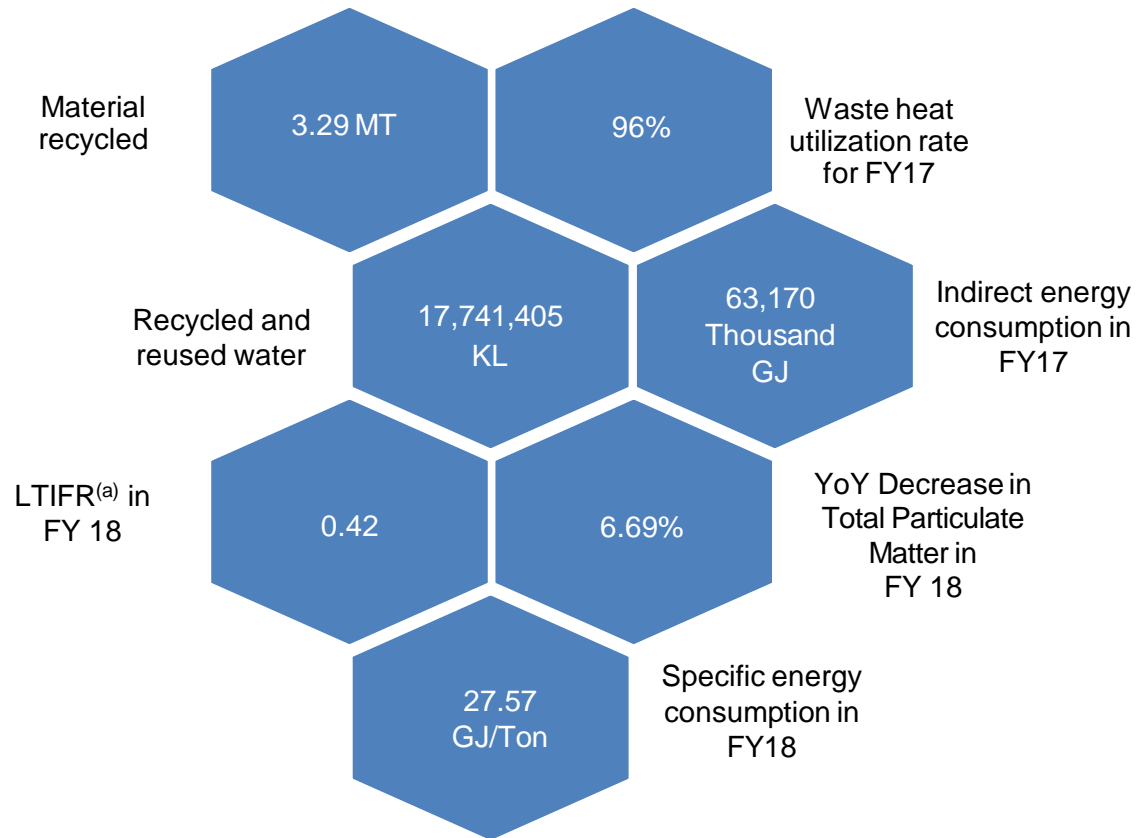
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JSW Vishwas+
Premium AL-Zn Sheets
Anti-corrosive sheets
that stand the test of time



JSW PEHAL
Steel Toilet
Quality sanitation is everyone's right

Performance on sustainability metrics



(a) Lost time injury frequency rate

2018:

- Ranked sixth among the best operating steel plants in the world (World Steel Dynamics, June 2017).
- Recognised as the 'Industry Mover' in the Dow Jones Sustainability Indices for achieving the largest improvement in sustainability performance compared to the previous year.
- Featured in the Vigeo Eiris Emerging 70 group sustainability rating.
- Best CSR Practice award 2018: CSR Summit (February 2018)

2017:

- 1st iron & steel company in India to get an Environment Product Declaration certificate as per ISO 14025 for hot rolled steel strips at Vijayanagar
- 1st Prize for Fair Business Practices to JSW Steel Coated Products Ltd by CFBP Jamnalal Bajaj Trust
- Indian Merchants Chamber Ramakrishna Bajaj National Quality Performance Excellence Trophy in the Manufacturing Category to JSW Steel Coated Products Ltd

The background features a dense pattern of blue wire coils, likely representing a telecommunications or networking theme. Overlaid on this are several abstract, flowing curves in red, white, and blue, creating a sense of motion and modern design. The text 'Thank you' is centered in a clean, white, sans-serif font.

Thank you