EFS Transportation

IL&FS Transportation Networks Limited Analyst Presentation – August 2012



August 09, 2012



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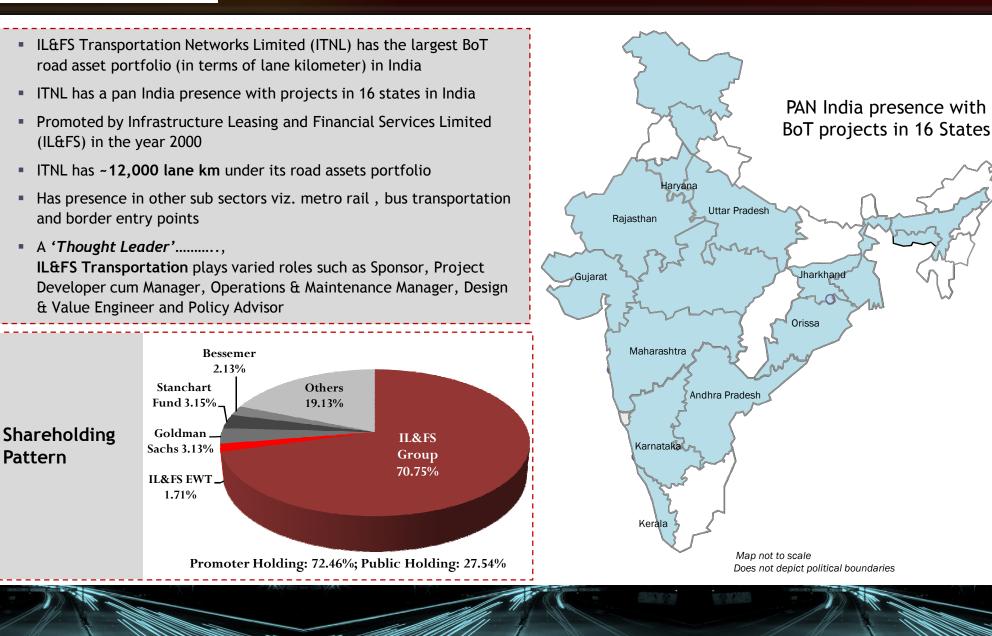


In this presentation...

- Company Overview
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- Road Projects



An Introduction





Key Differentiators







- With around 12,000 lane km comprised in 23 projects in its road assets portfolio ٠
- Forays into other surface transportation sub-sectors like metro, bus & border check-post ۲



- Track Record of Successful Project Implementation
 - Operational portfolio 5,453 lane kms of highways, operating one bus transportation project ۲
 - Projects substantially completed to budget and within time



Strong Parentage of IL&FS

- IL&FS Brand and expertise in finance & other infrastructure areas ۲
- Experience in working with various Government and other Authorities





Partnerships and Bilateral contracts with State Governments

State Highway Concessions in joint venture with the States of Kerala, Gujarat, Rajasthan & ${}^{\bullet}$ Jharkhand

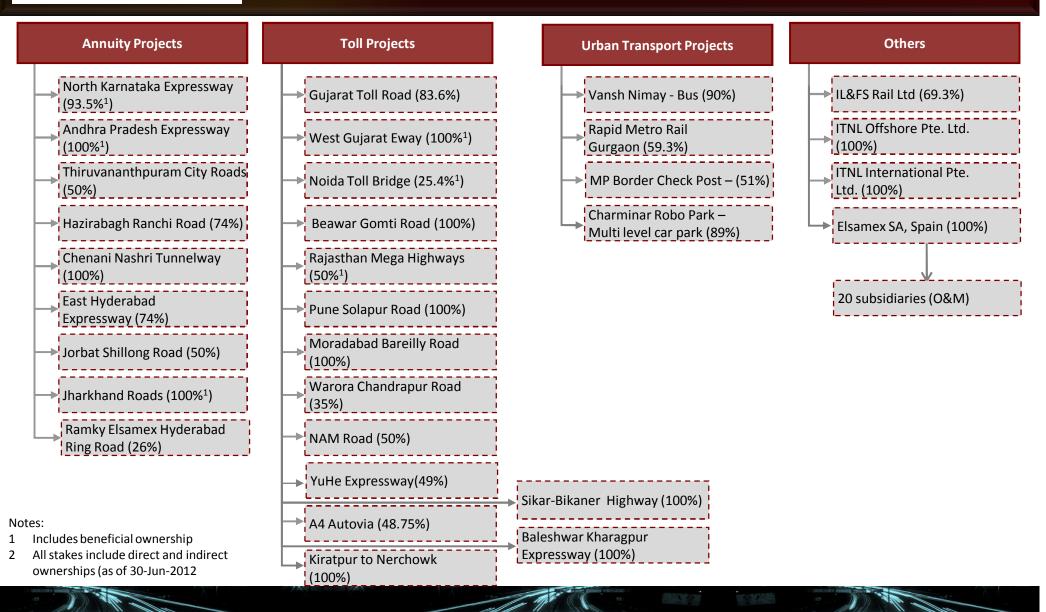
Diversified and de-risked portfolio

- Pan India presence with a fair mix of annuity and toll concessions
- Presence in Europe, Latin America through Elsamex SA
- Acquired Operational road project in China



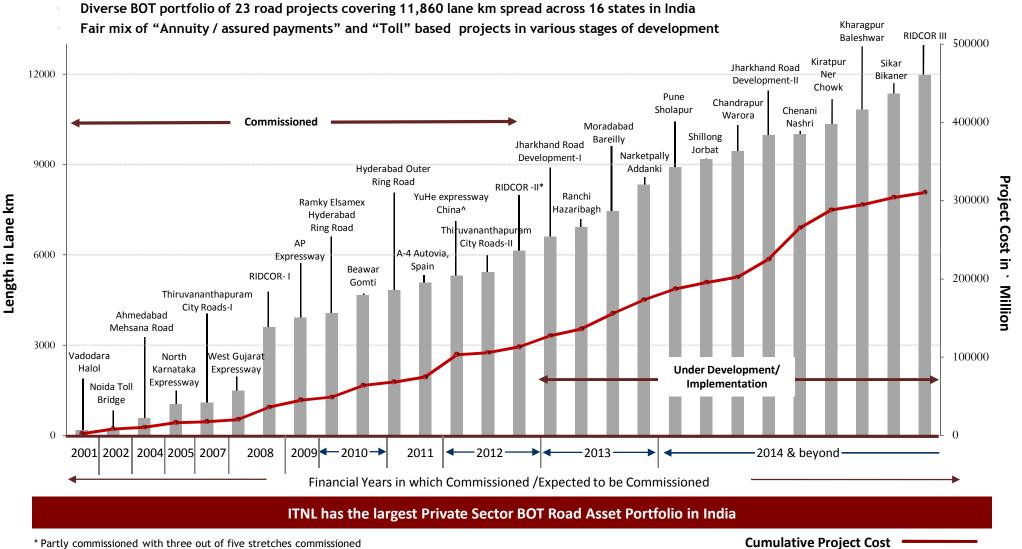


Organization Chart



L&FS Transportation

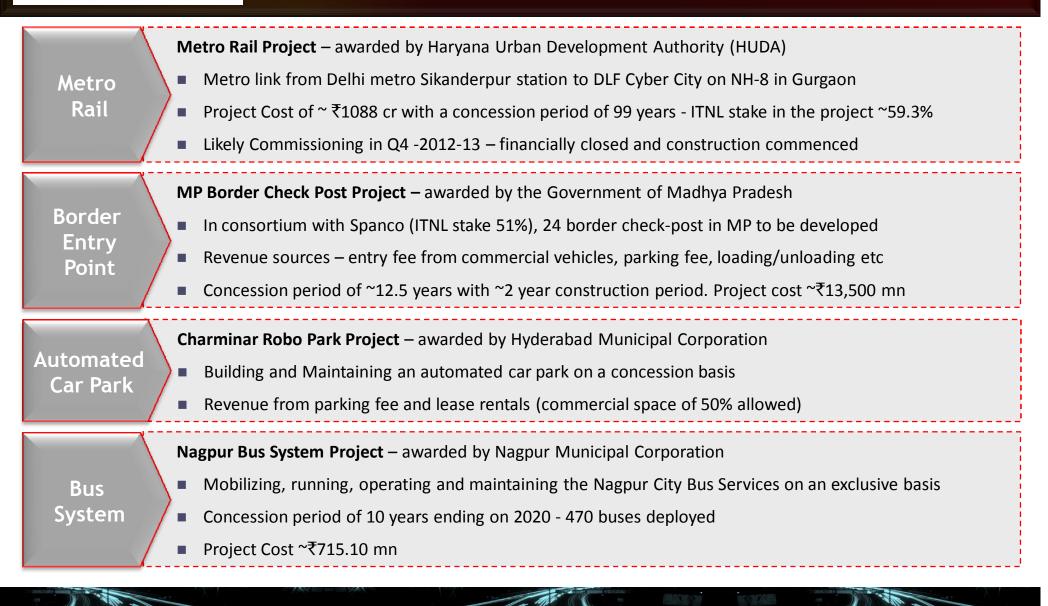
Portfolio: Road Projects



^ The operational project was acquired in Dec, 2011



Portfolio: Non Road Projects





Recent Project Awards & Financial Closures

ITNL Secured projects worth around ₹ 74 billion each year

in the last 2 financial years

| Project | Authority | ВОТ Туре | Length (lane km) | Estimated Cost (₹Million) |
|--|-----------|-------------|---------------------|------------------------------|
| Road Sector | | туре | | |
| Mega Highways-II | GoR | Toll | 698 | 8,126 |
| Chennai to Nashri in J&K | NHAI | Annuity | 38 | 37,200 |
| Jorabat to Shillong in North East | NHAI | Annuity | 262 | 8,240 |
| Narkatpally to Addanki in AP | GoAP | Toll | 888 | 17,605 |
| Madhya Pradesh Entry Point | GoMP | Fee | - | 13,500 |
| Two stretches under JARDP* | GoJ | Annuity | 198 | 6,732 |
| Kiratpur to Ner-Chowk in HP | NHAI | Toll | 327 | 22,910 |
| Baleshwar Kharagpur in West Bengal and Orissa | NHAI | Toll | 477 | 6,544 |
| RIDCOR III | GoR | Toll | 607 | 6,113 |
| IRIDCL II | MORTH | Toll | 332 | 12,000 |
| Sikar Bikaner in Rajasthan | GoR | Toll | 540 | 8,029 |
| Total | | | | 146,999 |

Debt Tied-up

| Project | Debt tied-up (₹Million) |
|--------------------------------------|----------------------------|
| Mega Highways –II | 6,098 |
| Chenani Nashri Tunnelway | 33,480 |
| Jorabat to Shillong | 7,400 |
| Narkatpally to Addanki | 10,600 |
| MP Border Check Post | 11,475 |
| Additional two stretches under JARDP | 5,545 |
| Kiratpur Ner Chowk | 16,556 |
| Total Debt tied –up | 91,154 |

ITNL Offshore Pte. Ltd. an fully owned subsidiary of ITNL has raised \$100 million by selling dim sum bonds, which are denominated in Yuan and issued in Hong Kong, this is a first dim sum offering by an Indian non-financial corporate.

*Under Jharkhand Accelerated Development Program Government of Jharkhand signed concessions for Chaibasa Kandra Chowka & Adityapur Kandra roads.



Project Pipeline for FY12



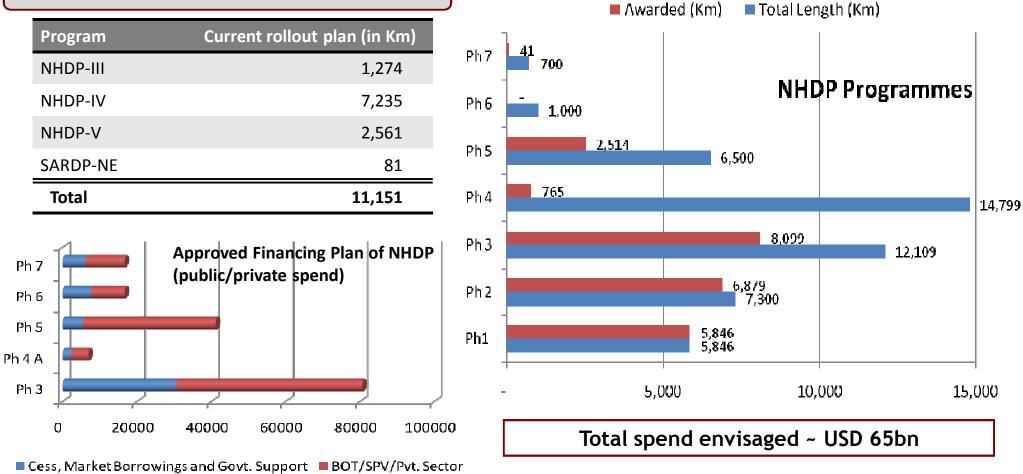
As of July 31, 2012

| BID PIPELINE | | | | | | | | |
|--------------|---------------------------------|-----------------|-------------|----------|------------------|-------------|--|--|
| | RFP | Stage (Post Qua | lification) | RFQ | Stage (Pre Quali | fication) | | |
| | Projects Length (km) Cost (₹Mn) | | | Projects | Length (km) | Cost (₹ Mn) | | |
| NHAI | 8 | 1004 | 78,340 | 29 | 3,670 | 2,81,696 | | |
| State | 4 | 277 | 9,670 | 3 | 257 | 8,200 | | |
| BRO | - | - | - | 1 | 6.5 | 30,600 | | |
| Total | 12 | 1,281 | 88,010 | 33 | 3,933 | 3,20,496 | | |



Road Sector Opportunity

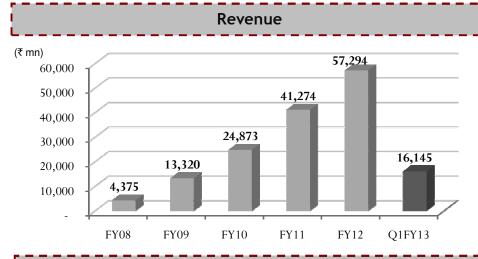
~23,000 km of award pending under NHDP - to be substantially executed under PPP

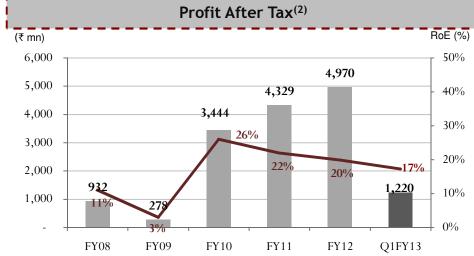


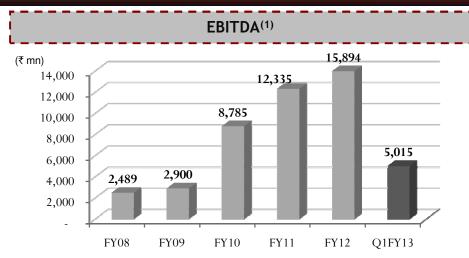
NHAI has targeted award of around 8,800 km in FY13

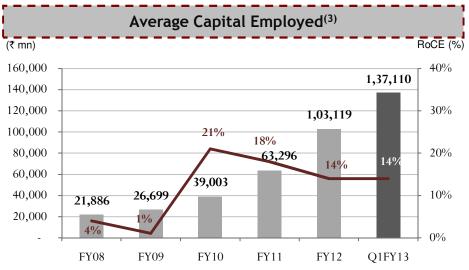


Financial Parameters (Consolidated)





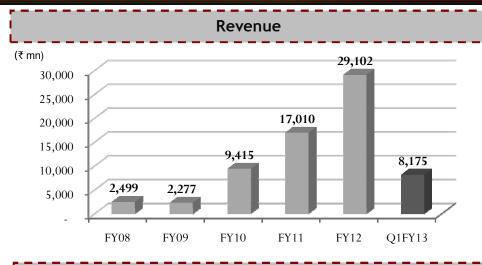


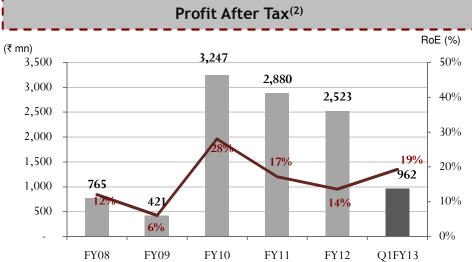


- 1. Includes other income and excludes gain from Foreign exchange fluctuation
- 2. RoE based on average equity;
- 3. RoCE based on average capital employed;



Financial Parameters (Standalone)

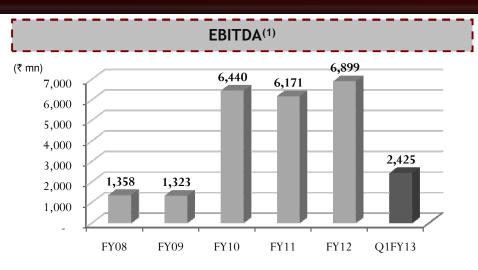


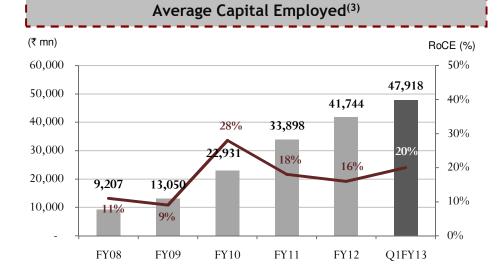


1. Includes other income and including gain from Foreign exchange fluctuation

2. RoE based on average equity;

3. RoCE based on average capital employed;







Profit & Loss Accounts Highlights

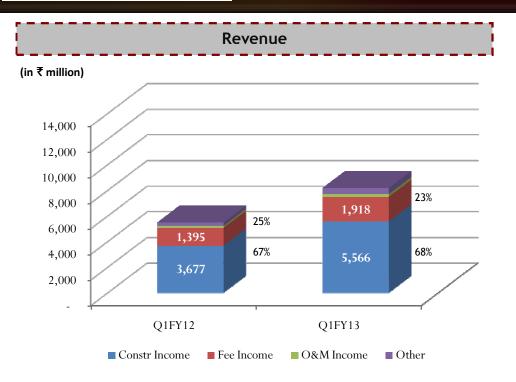
(All figures in ₹ million)

| | Consolidated | | | Standalone | | |
|-----------------------------|--------------|--------|----------|------------|----------------|----------|
| Key Parameters | Q1FY13 | Q1FY12 | % Change | Q1FY13 | Q1FY12 | % Change |
| Revenue | 16,145 | 11,156 | 45% | 8,175 | 5 <i>,</i> 484 | 49% |
| Other Income | 349 | 230 | 52% | 482 | 268 | 80% |
| EBITDA | 5,015 | 3,537 | 42% | 2,425 | 1,599 | 52% |
| EBITDA Margin | 31% | 32% | | 30% | 29% | |
| Interest | 2,520 | 1,426 | 77% | 860 | 559 | 54% |
| Depreciation | 242 | 161 | 50% | 25 | 25 | 0% |
| Profit Before Tax | 2,253 | 1,951 | 15% | 1,539 | 1,014 | 52% |
| PAT after minority interest | 1,220 | 1,157 | 5% | 962 | 621 | 55% |

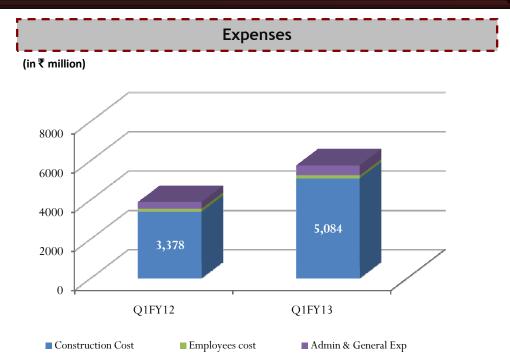
* In consolidated results, as per the relevant accounting policy, annuity projects are treated as financial assets and shown as receivable in the balance sheet. Hence interest during construction on annuity projects is charged to P&L unlike for toll projects where it is capitalized



Standalone Revenue & Expenses



- On year on year basis, the revenue from construction increased as in the last one year the construction progress has picked up and more projects have been added on to the order book
- Fee income comprised mainly income from Sikar Bikaner project, Baleshwar Kharagpur and Kiratpur Ner Chowk project

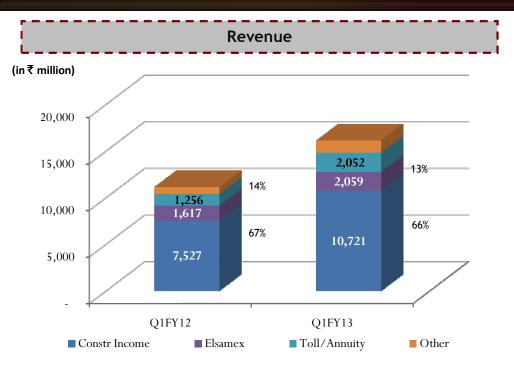


- The overall EBITDA margins during Q1 increased marginally mainly due to a higher fee income and increase in construction margins. On an absolute level EBITDA margins have gone up by *826 million year on year
- O&M Expenses have gone up which are commensurate with the increase in income

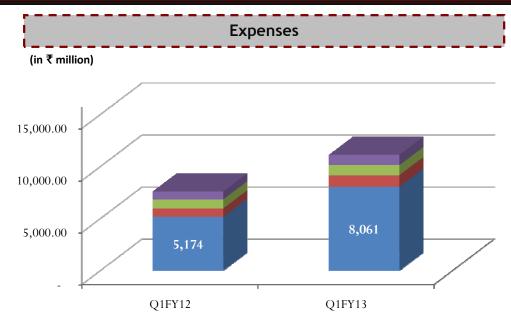




Consolidated Revenue & Expenses



- The total Income during this quarter increased, as compared to relevant quarter of last year, mainly on account of increased construction activity and increase in toll & annuity revenues. Elsamex contribution to revenues also increased by around 27% year on year
- Toll and annuity income has also increased due to increase in tariff and traffic on toll roads and increase in finance income recognized from annuity projects



Construction Cost Deter Operating Expenses Employees cost Admin & General Exp

- In the consolidated expenses for Q1 quarter, the main expense has been construction expense. In the other expenses, its gone up marginally mainly on account of increase in insurance expenses
- The margins in Q1 have slightly come off as compared to relevant quarter of last year, but have improved quarter on quarter



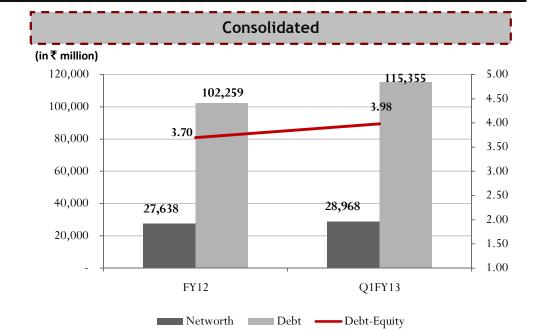
Debt Equity Analysis

Standalone (in ₹ million) 120,000 5.00 4.50 100,000 4.00 80,000 3.50 3.00 60,000 2.5040,000 2.00 27,261 28,707 19,438 20.430 1.50 20,000 1.40 1.41 1.00 0.50 FY12 Q1FY13 Networth Debt — Debt-Equity

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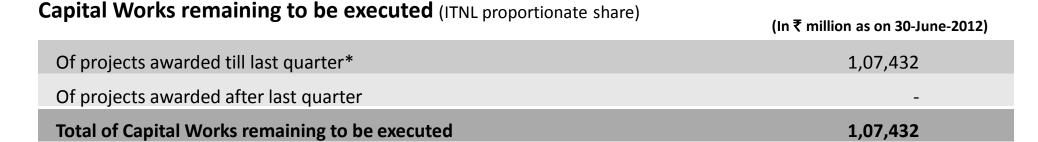
- The Debt Equity at the standalone level has marginally increased mainly on account of debt taken for investments made into projects during this quarter
- The standalone debt is mostly unsecured debt for on-lending to SPVs as sub-debt or for equity infusion into projects against cash accruals expected from them

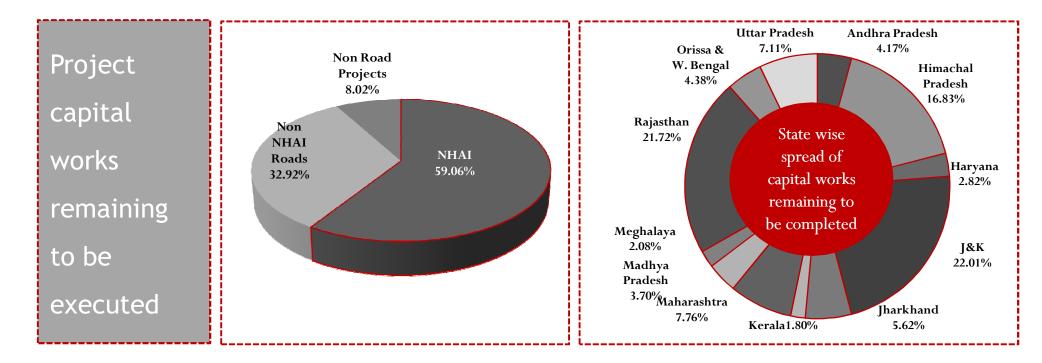


- The increase in debt at consolidated level is mainly on account of drawdown happening from sanctioned debt in accordance with construction progression
- In this quarter the debt equity has gone up mainly on account of increase in debt and less than commensurate increase in networth. With drawdown of grant in coming quarters, it is likely to improve

Incremental Equity Commitment for existing projects is around ₹ 10,000 million Total Investments made till 30-June-12 (including advance against equity) is approximately ₹ 27,983 million











Revenue Collection on Operational Road Projects

Not adjusted for ITNL's stake (All fig

(All figures in ₹ million)

| Toll Projects under Operation | Average DailyToll Collection | | | | | |
|-------------------------------------|------------------------------|----------|-------------|--|--|--|
| | In FY11 | In FY 12 | In Q1 FY 13 | | | |
| Ahmedabad Mehsana Road (Gujarat) | 1.32 | 1.59 | 1.70 | | | |
| Vadodra Halol Road (Gujarat) | 1.01 | 1.24 | 1.28 | | | |
| NoidaToll Bridge (UP) | 1.91 | 2.11 | 2.24 | | | |
| Mega Highways – Rajasthan | 2.91 | 4.23 | 5.70 | | | |
| Rajkot to Jetpur – Gondal (Gujarat) | 0.92 | 1.04 | 1.25 | | | |
| Beawer Gomti (Rajasthan) | 0.43 | 0.46 | 0.47 | | | |

| Operational Annuity Projects | Annuity receivable Per Annum | Accrued |
|--|---------------------------------|-----------|
| | | in Q1FY13 |
| Maharashtra Border to Belgaum (Karnataka) | 1,010.34 | 252.58 |
| Thirvananthapuram City Roads (Ph-I) (Kerala) | 118.00 | 29.50 |
| Kotakatta to Kurnool (Andhra Pradesh) | 1130.40 | 282.60 |
| East Hyderabad Expressway Limited | 666.60 | 166.50 |

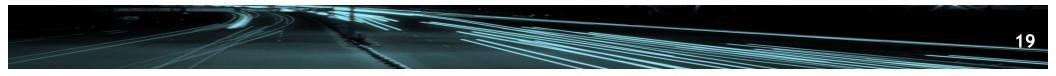
Total Average Daily Collection from toll and annuity in Q1FY13 has been around ₹ 20.68 million

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IL&FS Transportation

Rs in million

| Sr.No | Name of the Project | Toll Revenue start date | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 |
|-------|--|----------------------------|---------|---------|---------|---------|---------|
| 1 | Ahmedabad Mehsana Road (Gujarat) | Feb-03 | 614 | 660 | 747 | 850 | 1037 |
| 2 | Vadodra Halol Road (Gujarat) | Oct-00 | 014 | 000 | , , , | 050 | 1037 |
| 3 | Noida Toll Bridge (UP) | Feb-01 | 547 | 659 | 706 | 696 | 774 |
| 4 | Mega Highways - Rajasthan (Ph - I) | Mar-08 | 93 | 546 | 826 | 1063 | 1548 |
| 5 | Rajkot to Jetpur - Gondal (Gujarat) | May-08 | 121 | 225 | 312 | 337 | 380 |
| 6 | Beawer Gomti (Rajasthan) | Aug-10 | | | - | 94 | 168 |
| | Total | | 1,375 | 2,090 | 2,591 | 3,040 | 3,907 |



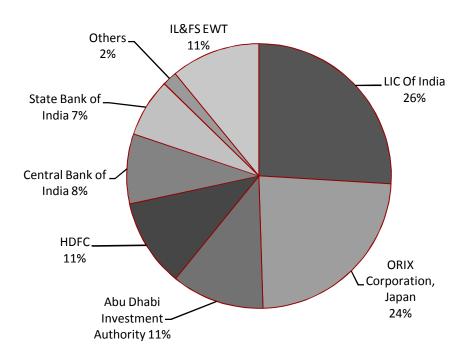


IL&FS - Strong Parentage

IL&FS Overview

- Incorporated in 1987 as a JV between the Central Bank of India (CBI), Housing Development Finance Corporation Limited (HDFC) and Unit Trust of India (UTI) to commercialize infrastructure projects and work with public & private sector project sponsors
 - Offers a full range of financial, project development and management services including investment banking, project financing, project development, management and implementation, asset management, corporate advisory and back office services through Group companies
 - Identifies need-driven projects including roads, bridges, power, ports, water supply, area development which can be commercially viable and works on structural / financial solutions to enhance project viability
- Has expertise across diverse sectors such as transportation, area development, cluster development, finance, power, ports, water and waste management, urban infrastructure, environment, education and tourism
 - Track record of promoting and financing public infrastructure projects in India for over 22 years
- Strategic relations with Governments of 17 states across India and on-going relationships with various departments of the Central Government
 - Benefits to ITNL in negotiating bilateral contracts with state and central government entities when such bodies are seeking customized proposals

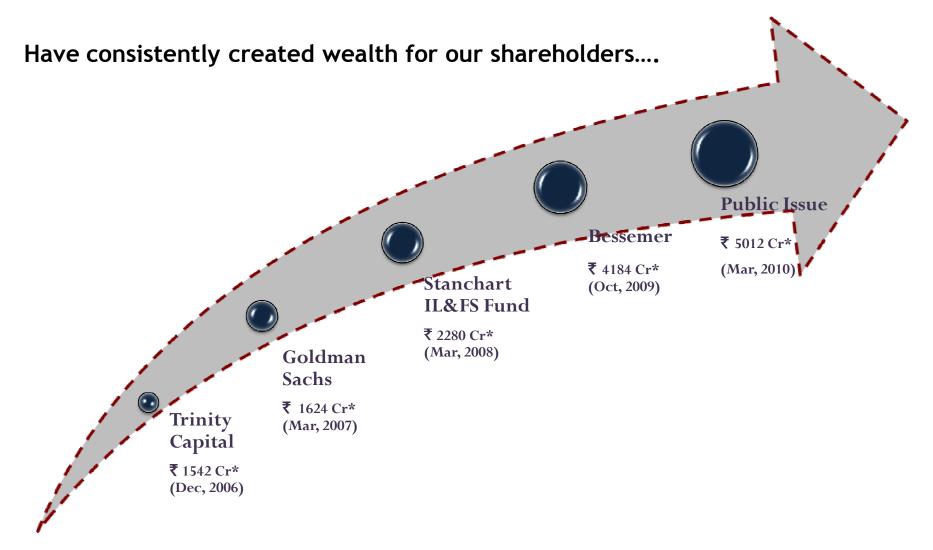
IL&FS Shareholding







Value for Shareholders



* Post money valuation



Experienced Board of Directors

Independent Directors

| Name | Designation |
|----------------------|--|
| Mr Deepak Dasgupta | Chairman; Former Chairman, NHAI |
| Mr RC Sinha | Former Vice Chairman & MD, Maharashtra Airport Development Company Limited |
| Mr HP Jamdar | Former Principal Secretary, Government of Gujarat |
| Mr Deepak Satwalekar | Former Managing Director, HDFC |

Non-Independent Directors

| Name | Designation |
|----------------------|---------------------------------------|
| Mr Ravi Parthasarthy | Chairman, IL&FS |
| Mr Hari Sankaran | Managing Director, IL&FS |
| Mr Arun K Saha | Joint Managing Director, IL&FS |
| Mr Vibhav Kapoor | Group Chief Investment Officer, IL&FS |
| Mr Pradeep Puri | Managing Director, NTBCL |
| Mr K Ramchand | Managing Director |
| Mr Mukund Sapre | Executive Director |





| K. Ramchand Managing Director | He has over 31 years of experience in urban and transport infrastructure development sector |
|---|---|
| Mukund Sapre Executive Director | He has over 28 years of experience in the industry. |
| Harish Mathur Chief Executive | Has over 34 years of experience in various road construction projects. |
| George Cherian Chief Financial Officer | He has over 36 years of experience in accounting and finance. Responsible for Financial and Accounting matters, Statutory Compliances and Financial Planning |
| V. K. Raina Technical Director | He has over 41 years of experience in the industry and is our in-house expert on structures including bridges and RoBs. He has been associated with many projects & has authored books on the subject too |
| S C Mittal Senior Vice President | He has over 29 years of experience in the industry. He heads our in-house design unit |
| Krishna Ghag AVP & Company Secretary | He has over 29 years of experience in the industry. He is the compliance officer, legal adviser and Company Secretary |



Road Projects



Operational Projects

| Name of Project | North Karnataka Expressway Limited (NKEL) | West Gujarat Expressway Limited (WGEL) | Noida Toll Bridge (NTBCL) | Vadodara Halol Toll Road (GRICL) | Ahmedabad - Mehsana Road (GRICL) |
|--|---|--|--|---|--|
| Authority | NHAI | NHAI | NOIDA | Govt. of Gujarat | Govt. of Gujarat |
| State | Karnataka | Gujarat | Delhi & Noida | Gujarat | Gujarat |
| ВОТ Туре | Annuity | Toll | Toll | Toll | Toll |
| Project (Lane Km) | 472 | 389 | 60 | 190 | 333 |
| Project Cost (Rs Mn) | 5,995 | 2,758 | 5,888 | 1,709 | 3,422 |
| Debt Outstanding as at June 30, 2012 (Rs. Mn) | 3,644 | 1,868 | 1019 | 2,250 | |
| Date of Start (Concession) | June-02 | Sept-05 | Dec-98 | Apr-99 | Apr-2000 |
| Concession Period | 17.5 years | 20 Years | 30 yrs (extendable) | 30 yrs (extendable) | 30 yrs (extendable) |
| Description | 4 laning of the section of the Belgaum to Maharashtra Border aggregating 77 km on BOT (Annuity) basis | Widening / Improvement of the Rajkot – Jeptur - Gondal Section from 2 Iane to 4 Iane; on National Highway No. 8 B (NH-8B) in state of Gujarat | Development of a toll bridge and approach roads connecting Delhi to NOIDA on BOOT basis | 4 Laning of Vadodara Halol road Km 8.0 to 40.0 of SH 87 with service road in the state of Gujarat on BOOT Basis | 4-Laning of Ahmedabad Mehsana Road (SH-41) with service roads from Km 19.0 to 70.6 and Kadi spur road (11.5 Km) in the state of Gujarat on BOOT Basis |



Operational Projects

| Name of Project | Andhra Pradesh Expressway (APEL) | Thiruvananthapuram City Roads (Phase I) (TRDCL) | Mega Highways Project Rajasthan (RIDCOR) | Beawar Gomti Road (IRIDCL) | East Hyderabad Expressway Ltd (EHEL) |
|--|---|---|--|--|--|
| Authority | NHAI | KRFB | Govt. of Rajasthan | MORTH | HUDA |
| State | Andhra Pradesh | Kerala | Rajasthan | Rajasthan | Andhra Pradesh |
| ВОТ Туре | Annuity | Annuity | Toll | Toll | Annuity |
| Project (Lane Km) | 328 | 51 | 2106 | 248 | 173 |
| Project Cost (Rs Mn) | 8,629 | 1,083 | 16,500 | 3,550 | 4,278 |
| Debt Outstanding as on June 30, 2012 (Rs. Mn) | 7,117 | 487 | 17,254 | 3,218 | 3,473 |
| Date of Start (Concession) | Sept-06 | Jul-07 | Jan-06 | Oct-09 | Dec-07 |
| Concession Period | 20 years | 17.5 Years | 32 Years | 30 Years if 4 lane is done otherwise 11 Years | 15 Years |
| Description | Kotakatta Bypass to Kurnool on NH-7 in the state of Andhra Pradesh under North South Corridor (NHDP Phase II) on BOT (Annuity) Basis | Thiruvananthapuram City Roads Improvement Project | Improvement of following project road stretches aggregating 1053 km - Phalodi to Ramji ki Gol, Hanumangarh to Kishangarh, Alwar to Sikandra, Lalsot to Kota and Baran to Jhalawar | Widening of 2-lane road to 2-lane + Paved Shoulder in Beawar – Gomti Section of NH- 8 from km 58.245 to km 177.050 in the State of Rajasthan on DBFOT Basis | 8 – Laning Outer Ring Road in Hyderabad from Pedda Amberpet to Bongulur from Km 95.000 to Km 108.000 on BOT (Annuity) basis |



Project Under Implementation

| Name of Project | Thiruvananthapuram City Roads (Phase II & III) (TRDCL) | Jharkhand Accelerated Road Development Programme (JRPICL) | Hazaribagh Ranchi Expressway Limited (HREL) | Pune Sholapur Road Development Company Limited (PSRDCL) | Mega Highways Project, Rajasthan (Additional) (RIDCOR) |
|--|--|--|--|--|---|
| Authority | KRFB | GOJ | NHAI | NHAI | Govt. of Rajasthan |
| State | Kerala | Jharkhand | Jharkhand | Maharashtra | Rajasthan |
| ВОТ Туре | Annuity | Annuity | Annuity | Toll | Toll |
| Project (Lane Km) | 107 | 466 | 319 | 571 | 715 |
| Project Cost (Rs Mn) | 2,626 | 16,290 | 9,302 | 14,027 | 8,126 |
| Debt Outstanding as at June 30, 2012 (Rs. Mn) | 1189 | 14,473 | 7,400 | 4,520 | 4,454 |
| Grant (Rs. Mn) | 1,190 (award) | - | - | - | - |
| Appointed Date | Jun -09 | Apr-10 – RRR Mar 10 | Aug-10 | Sept - 11 | - |
| Scheduled Project Completion Date | Earlier 30 Nov 2011 New dates not yet received | Oct-12 | Jan-13 | Jan-14 | Jan-13 |
| Concession Period | 15 years | 17.5 years | 18 years | 20 years | 32 years |
| Description | Thiruvananthapuram City Roads Improvement Project | Improvement works of Jharkhand Roads - Ranchi Ring Road - Ranchi Patratu - Patratu Ramgarh | 4 Ianing of Hazaribagh – Ranchi Section Of NH-33 in State Of Jharkhand Under NHDP Phase III On BOT (Annuity) Basis | 4 laning of Pune - Sholapur Section of NH-9 from in the state of Maharashtra under NHDP phase III on DBFOT basis | Improvement of 6 new project roads :Alwar to Bhiwadi Road, Arjunsar to Pallu, Jhalawar to Jhalawar Road, Hanumangarh to Sangaria, Kapren to Mangrol & Jhalawar to Ujjain |



Project Under Implementation

| Name of Project | Chandrapur Warora WCBTRL) | Moradabad to Bareilly (MBEL) | Chennani - Nashri (CNTL) | Jorabat Shillong (JSEL) | Narketpally - Addanki (NAMEL) | M P Border Check Post (MPBCDCL) |
|--|--|---|---|---|---|--|
| Authority | PWD, Maharashtra | NHAI | NHAI | NHAI | Govt. of Andhra Pradesh | MPRDC |
| State | Maharashtra | Uttar Pradesh | Jammu & Kashmir | Assam & Meghalaya | Andhra Pradesh | Madhya Pradesh |
| ВОТ Туре | Toll | Toll | Annuity | Annuity | Toll | Fees Collection |
| Project (Lane Km) | 275 | 522 | 38 | 262 | 888 | NA |
| Project Cost (Rs Mn) | 6,886 | 19,836 | 37,200 | 8,240 | 17,605 | 13,500 |
| Debt Outstanding as at June 30, 2012 (Rs. Mn) | - | 8,240 | 10,703 | 2,780 | 5,130 | 2,835 |
| Grant (Rs. Mn) | 1763 | 4433 | - | - | - | - |
| Appointed Date | Jan -11 | Dec - 10 | May - 11 | Jan - 11 | Jan - 11 | May – 11 |
| Scheduled Project Completion Date | Jan-14 | Jun-13 | Nov-15 | Jan-14 | July-13 | Jan -14 |
| Concession Period | 30 years | 25 years | 20 years | 20 years | 24 years | 12.5 years |
| Description | 4 Laning of Warora Chandrapur Ballarpur Bamni road on SH 264 in Maharashtra on DBFOT basis | 4 Laning Of Moradabad Bareilly Section Of Nh- 24 in Uttar Pradesh Under NHDP Phase III | 4 Lanning of Chenani to Nashri section of NH-1A including 9 Km long tunnel on BOT (Annuity) basis in Jammu and Kashmir | 4 Laning of Jorabat- Shillong (Barapani) section of NH-40 in Assam & Meghalaya | 4-Laning of Narketpally – Addanki – Medarametla Road (SH-2) in Andhra Pradesh | Development of 24 Border Check post in MP on BOT Basis |



Project Under Implementation

| Name of Project | Chaibasa Kandra Chowka Road (JRPICL) | Adityapur Kandra Road (JRPICL) | Kiratpur Ner Chowk (KNEL) | Kharagpur Baleshwar Road (BKEL) | Sikar Bikaner | Beawer Gomti (Additional) |
|--|--|---|---|------------------------------------|---------------------------|---|
| Authority | Govt of Jharkhand | Govt of Jharkhand | NHAI | NHAI | MoRTH | MoRTH |
| State | Jharkhand | Jharkhand | Himachal Pradesh | West Bengal & Orissa | Rajasthan | Rajasthan |
| ВОТ Туре | Annuity | Annuity | Toll | Toll | Toll | Toll |
| Project (Lane Km) | 137.4 | 60.4 | 327 | 477 | 540 | 217 |
| Project Cost (Rs Mn) | 4,910 | 2,420 | 22,910 | 6,544 | 8,029 | 12,000 |
| Debt Outstanding as at June 30, 2012 (Rs. Mn) | Included in Debt of JRPICL | Included in Debt of JRPICL | - | - | - | - |
| Grant (Rs. Mn) | Nil | Nil | 1,345.7 | 350 (Premium) | 2473 | - |
| Appointed Date | Nov-11 | Feb-12 | Pending | Financial closure pending | Financial closure pending | Financial closure pending |
| Scheduled Project Completion Date | May-14 | Oct – 2012 | - | - | - | - |
| Concession Period | 17.5 | 15.75 | 28 | 24 Years | 25 Years | 30 Years |
| Description | Two laning of the Chaibasa-Kandra-Chowka stretch (total length of 68.70 kms) in Jharkhand on BOT Annuity basis | Four laning of the Adityapur-Kandra stretch (total length of 15.1 kms) in Jharkhand on BOT Annuity basis | Four laning of Kiratpur-Ner Chowk section of NH 21 in Himachal Pradesh on BOT (Toll) | - | | Four laning of existing two lane section on the Beawar Gomti section of National Highway No.8 in Rajasthan |

Thank You



KEFS | Transportation

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