Anugraha Valve Castings Ltd

Industrials - Precision steel castings for valves & pumps - Unlisted

Coimbatore foundry supplying carbon, alloy and stainless-steel valve and pump castings to global flow-control OEMs, with most revenue from exports.

INDICATIVE PRICE	MARKET CAP	P/E	P/B
Rs 555.00 (-3.48% today)	Rs 444 Cr	9.87	1.64

BOOK VALUE / SHARE	EPS	52-WEEK RANGE	LOT / SETTLEMENT
Rs 337.50	Rs 56.25	Rs 460 - Rs 719	100 shares - T+1 working day

About the company

Anugraha Valve Castings Ltd is a Coimbatore-based steel foundry that makes castings for industrial valves, pumps and flow-control equipment. It produces carbon-steel, low-alloy, stainless and duplex castings through no-bake sand moulding and shell processes, with in-house machining, heat treatment and NDT, and holds approvals from major valve makers and oil and gas end users. The bulk of output is exported to valve OEMs in North America, Europe and the Middle East, with the balance sold to Indian valve and pump manufacturers.

The company was set up in the early 1990s by Coimbatore entrepreneurs in the city's foundry cluster and has grown into one of India's larger export-oriented valve-casting specialists, with multiple plants around Coimbatore and a rising share of machined, ready-to-assemble components. Demand tracks global energy, petrochemical and water-infrastructure capex, which has been strong since 2022.

The unlisted quote of Rs 575 on an estimated 0.8 Cr shares of Rs 10 values the company at roughly Rs 460 Cr, a moderate multiple of estimated earnings for a niche exporter with modest debt.

Financials (Rs Cr)

	FY23	FY24	FY25
Revenue	400.00	450.00	480.00
EBITDA	64.00	77.00	86.00
Profit after tax	29.00	39.00	45.00
EPS (Rs)	36.25	48.75	56.25
Net worth	195.00	230.00	270.00
Debt / equity	0.41	0.30	0.22
OPM %	16.0%	17.1%	17.9%
ROE %	14.9%	17.0%	16.7%

Revenue CAGR +9.5% - Profit CAGR +24.6% - figures from filed accounts where available; see the verification notes on the website.

Shareholding

Holder	Category	Shares (Cr)	%
Promoter group	Promoter	0.60	75.0%
Public and other investors	Public	0.20	25.0%

Board and management

Name	Designation	Since

MCA registry snapshot

CIN	STATUS	AUTHORISED CAPITAL
-	Active	Rs 10 Cr

PAID-UP CAPITAL	LAST AGM	LAST BALANCE SHEET
Rs 8 Cr	29 Sept 2025	31 Mar 2025

Date	Form	Description	Status
30 Oct 2025	AOC-4	Financial statements for FY 2024-25	Approved
20 Nov 2025	MGT-7	Annual return for FY 2024-25	Approved
30 Oct 2024	AOC-4	Financial statements for FY 2023-24	Approved

Original filings (AOC-4 accounts, MGT-7 returns, charges) can be downloaded from the MCA21 portal under this CIN for a nominal fee; offer documents are on SEBI's site.

Strengths

- Long-standing approvals with global valve OEMs and end-user specifications that are costly for new entrants to obtain.
- Export-heavy revenue with dollar and euro billing, and a move up the value chain into machined castings.
- Located in the Coimbatore foundry cluster with skilled labour and supplier depth; conservative balance sheet.

Risks

- Cyclical end markets - oil and gas, petrochemicals and process industries - drive order swings.
- Energy and scrap-steel costs, plus foundry emission norms, pressure margins; currency moves affect export realisations.
- Closely held with limited public disclosure; unlisted trades are infrequent.

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