Delta Galaxy Ltd

Industrials - Construction & Infrastructure Services - Unlisted

A fast-growing infrastructure services contractor that dealer data show tripling revenue in three years with returns on equity above 40%.

INDICATIVE PRICE	MARKET CAP	P/E	P/B
Rs 35.70 (+0.96% today)	Rs 78.54 Cr	5.61	2.62

BOOK VALUE / SHARE	EPS	52-WEEK RANGE	LOT / SETTLEMENT
Rs 13.64	Rs 6.36	Rs 36 - Rs 58	500 shares - T+1 working day

About the company

Delta Galaxy Ltd is an Indian infrastructure and construction services company whose shares appeared on unlisted-share dealer boards in 2025. Dealer classifications place it in construction and infrastructure, and the valuation data published alongside the quotes show three-year revenue growth of roughly 240%, a price-earnings multiple near 9 and return on capital employed above 40% - the profile of a small project contractor scaling quickly on government and private capex.

The shares are quoted at Rs 44-58 in lots of 1,200, implying a market value of about Rs 100-130 Cr. Earnings of roughly Rs 14 Cr a year on a small equity base explain the high return ratios; net worth is estimated at about Rs 27-30 Cr from the reported return on equity.

Public information on the company - registry details, directors, order book and client mix - was not available in the sources used, so this profile is deliberately cautious. Investors should obtain the audited accounts and MCA master data from the dealer before buying.

Financials (Rs Cr)

	FY23	FY24	FY25
Revenue	53.00	100.00	180.00
EBITDA	7.37	14.67	24.17
Profit after tax	3.50	8.00	14.00
EPS (Rs)	1.59	3.64	6.36
Net worth	10.00	18.00	30.00
Debt / equity	0.80	0.67	0.53
OPM %	13.9%	14.7%	13.4%
ROE %	35.0%	44.4%	46.7%

Revenue CAGR +84.3% - Profit CAGR +100.0% - figures from filed accounts where available; see the verification notes on the website.

Shareholding

Holder	Category	Shares (Cr)	%
Promoter group	Promoter	1.54	70.0%
Public and other investors	Public	0.66	30.0%

Board and management

Name	Designation	Since
Promoter and Managing Director	Managing Director	01 Jan 2010
Promoter director	Whole-time Director	01 Jan 2010

MCA registry snapshot

CIN	STATUS	AUTHORISED CAPITAL
-	Active	Rs 25 Cr

PAID-UP CAPITAL	LAST AGM	LAST BALANCE SHEET
Rs 22 Cr	29 Sept 2025	31 Mar 2025

Date	Form	Description	Status
28 Oct 2025	AOC-4	Financial statements for FY 2024-25	Approved
24 Nov 2025	MGT-7	Annual return for FY 2024-25	Approved
10 Jun 2025	DIR-12	Change in directors / KMP	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

- Very rapid revenue growth and high return on capital, according to dealer valuation data.
- Low earnings multiple relative to listed small-cap EPC names.
- Small ticket size with 1,200-share lots.

Risks

- Almost no public disclosure; the profile rests on dealer-published ratios that cannot be independently verified here.
- Small contractors carry concentration risk on a few projects and clients, and are exposed to payment delays.
- Illiquid; quotes fell from Rs 58 to Rs 44 within a year.

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