Yogiji Digi Ltd

Industrials - Flat-steel processing equipment - rolling mills and process lines - DRHP Filed - ISIN INE0SRQ01020

Faridabad engineering company that builds cold rolling mills, pickling lines, annealing lines and metal-coating lines for flat-steel producers; filed a DRHP with SEBI in July 2026 for a Rs 270 Cr fresh issue plus an offer for sale.

INDICATIVE PRICE	MARKET CAP	P/E	P/B
Rs 295.80 (-1.92% today)	Rs 1,677 Cr	41.49	8.61

BOOK VALUE / SHARE	EPS	52-WEEK RANGE	LOT / SETTLEMENT
Rs 34.34	Rs 7.13	Rs 258 - Rs 296	100 shares - T+1 working day

About the company

Yogiji Digi Limited designs, manufactures, installs and commissions capital equipment for flat-steel processing: cold rolling mills (4-high, 6-high and 20-high reversing and tandem mills), push-pull and continuous pickling lines, annealing and pickling lines for stainless steel, continuous galvanising and other metal-coating lines, colour-coating lines, skin-pass and tension-levelling lines, slitting and cut-to-length lines, and the drives, automation and auxiliaries that go with them. Customers are integrated and secondary steel producers and re-rollers in India and overseas, who buy the lines on a turnkey or engineered-equipment basis with multi-year after-sales service.

The company grew out of the Faridabad-based Yogiji group of rolling-mill builders and carries the 'Digi' name from a technology collaboration that brought automation and process know-how into its lines. It is promoter-run by Navneet Singh, Sameer Bansal and Satish Kumar Tripathi, who together held 45.27% at the DRHP date, with the remaining 54.73% held by public and other shareholders - an unusually wide non-promoter base for a pre-IPO industrial company, which is why the shares already carry ISIN INE0SRQ01020 and trade off-market.

Restated financials in the DRHP show revenue from operations of Rs 396.53 Cr in FY24, Rs 479.68 Cr in FY25 (total income Rs 483.67 Cr) and Rs 626.11 Cr in FY26 (total income Rs 633.62 Cr, up 31%), with profit after tax of Rs 28.04 Cr in FY25 and Rs 40.42 Cr in FY26 (up 44%). Return on equity was about 19-21% in FY26 and EPS Rs 7.13, which implies roughly 5.67 Cr shares outstanding. Other lines in the financial table - FY24 profit, depreciation, interest, tax and the balance sheet - are estimates around those disclosed totals.

Financials (Rs Cr)

	FY24	FY25	FY26
Revenue	396.53	479.68	626.11
EBITDA	48.00	60.50	80.00
Profit after tax	21.00	28.00	40.40
EPS (Rs)	3.70	4.94	7.13
Net worth	126.70	154.70	194.70
Debt / equity	0.95	0.90	0.82
OPM %	12.1%	12.6%	12.8%
ROE %	16.6%	18.1%	20.8%

Revenue CAGR +25.7% - Profit CAGR +38.7% - figures from filed accounts where available; see the verification notes on the website.

Shareholding

Holder	Category	Shares (Cr)	%
Navneet Singh, Sameer Bansal, Satish Kumar Tripathi and promoter group	Promoter	2.57	45.3%
Public and other shareholders (pre-IPO)	Public	3.10	54.7%

Board and management

Name	Designation	Since
Navneet Singh	Promoter & Managing Director (indicative)	01 Jan 2010
Sameer Bansal	Promoter & Whole-time Director (indicative)	01 Jan 2010
Satish Kumar Tripathi	Promoter & Whole-time Director (indicative)	01 Jan 2010

MCA registry snapshot

CIN	STATUS	AUTHORISED CAPITAL
-	Active	Rs 80 Cr

PAID-UP CAPITAL	LAST AGM	LAST BALANCE SHEET
Rs 56.7 Cr	30 Sept 2026	31 Mar 2026

Date	Form	Description	Status
20 Jul 2026	DRHP	Draft red herring prospectus filed with SEBI: fresh issue Rs 270 Cr + OF	Under Process
30 Oct 2025	AOC-4	Financial statements FY 2024-25 (revenue Rs 479.68 Cr, PAT Rs 28.04 Cr); f	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.

Reports and documents

Document	Type	Period	Where
Draft Red Herring Prospectus (20 July 2026)	DRHP	FY26	SEBI
Annual financial statements FY 2024-25 (AOC-4)	Annual Report	FY25	MCA21 (AOC-4)

Strengths

- Fast, profitable growth: revenue up from Rs 396.53 Cr (FY24) to Rs 626.11 Cr (FY26), PAT up 44% to Rs 40.42 Cr in FY26, ROE about 20%.
- Niche engineering capability - cold rolling mills, pickling, annealing and coating lines - that competes with imported European and Chinese lines on cost and service as Indian flat-steel capacity expands.
- IPO in motion: DRHP filed 20 July 2026 for a Rs 270 Cr fresh issue on BSE and NSE, with Rs 45 Cr of proceeds to cut debt and Rs 140 Cr for working capital, which should ease the balance sheet and provide a listed exit.
- Wide existing shareholder base (54.73% non-promoter) and a live ISIN, so shares are already in demat and transferable.

Risks

- The Rs 258 rate is unconfirmed - UnlistedZone's company page shows no price and only its list page carries the figure; no other dealer quote was found, so the price may be stale or mis-attributed.
- At Rs 258 the implied value is about Rs 1,460 Cr, roughly 36x FY26 earnings and about 7.5x book; if the IPO is priced lower, pre-IPO buyers lose, and pre-IPO shares are locked in for six months from listing.
- Project-based, lumpy order book tied to steel-industry capex cycles; large working-capital needs (the main use of IPO proceeds) and customer-concentration risk among a limited number of flat-steel producers.
- IPO timing is uncertain: SEBI observations, the price band and dates were pending in October 2026, and market conditions could delay or shrink the issue.

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