

## About Company

The company, **Anya Polytech & Fertilizers Limited**, operates in the manufacturing and trading sector. Its primary activities include:

### Manufacturing

- High-quality HDPE (High-Density Polyethylene) and PP (Polypropylene) bags made from HDPE granules.
- Zinc Sulphate fertilizers in two primary categories: Mono Hydrate and Hepta Hydrate.
- Micronutrient mixtures used for enhancing soil and crop quality.

### Trading

- Fertilizer and related products such as Single Super Phosphate (SSP), Organic Potash, Zinc EDTA, PROM (Phosphate-rich Organic Manure), Ferrous Sulphate, Magnesium Sulphate, Copper Sulphate, and cattle feed.

### Subsidiary Operations

- Engages in the manufacturing and distribution of fertilizers, including activities through its subsidiary **Arawali Phosphate Limited**, which focuses on SSP fertilizers.
- Plans to set up a Biofuel Pellet Plant through another subsidiary, **Yara Green Energy Private Limited**.

## Financials of the company

(Fig. in Cr)

Particulars	June 30, 2024	March 31, 2024	March 31, 2023	March 31, 2022
Revenue from Operations	40.39	123.41	115.55	91.84
Revenue Growth		6.81%	25.81%	
EBITDA Margins	22.35%	13.36%	8.68%	5.22%
PAT Margins	10.92%	7.76%	4.08%	0.76%
ROCE		16.47%	10.69%	5.03%
CFOA	0.09	1.70	2.77	(6.36)

## IPO Details

- ✦ Open date :  
**Dec 26, 2024**
- ✦ Close date :  
**Dec 30, 2024**
- ✦ Issue Size : **3,20,00,000 Shares (Rs. 44.80 Cr.)**
- ✦ Fresh Issue :  
**3,20,00,000 Shares**
- ✦ OFS :  
**Nil**
- ✦ Price Band :  
**Rs. 13-14 Per Equity Shares**
- ✦ Pre IPO Promoter Holding :  
**89.19%**
- ✦ Post IPO Promoter Holding :  
**65.40%**

## Objects of the Issue

- ✦ To meet Capital Expenditure towards purchase of Plant & Machinery and working capital requirement in Anya Polytech & Fertilizers Limited : **12.69 Cr**
- ✦ Setting-up new project in Yara Green Energy Private Limited, subsidiary Company, along with working capital requirement : **10.80 Cr**
- ✦ To meet Working Capital & Capital Expenditure in Arawali Phosphate Limited subsidiary Company : **8.50 Cr**



## Positive and Negative Points

### Positive

- ✦ Priced attractively at PE of 16.85.
- ✦ Entire IPO funds will be infused in the company for capex and working capital requirement.

### Negative

- ✦ No such growth in revenue.
- ✦ EBITDA and PAT margins are not stable.
- ✦ The company is planning to launch its IPO in December 2024, but its financials are only available up to June 30, 2024.
- ✦ High Debts level.
- ✦ Low capacity utilization in Zinc Sulphate, PP Bag and SSP fertilizers.
- ✦ Customer concentration as 90% revenue from top 10 customers.

## Comparison with Peers

Companies	Revenue	EBITDA Margins	PAT Margins	D/E Ratio	MCap	P/E
Anya Polytech & Fertilizers (FY 2024)	123.41 Cr	13.36%	7.76%	1.07	168 Cr	16.85
Commercial Syn Bag Limited (TTM)	304 Cr	9%	2.63%	0.92	361 Cr.	42.50





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