



**YOU THINK
WE SUPPLY**

CELEBRATING NETWORK OF 800 DISTRIBUTORS



Q4 & FY23 Results

Safe Harbour

Except for the historical information contained herein, statements in this presentation and the subsequent discussions, which include words or phrases such as "will", "aim", "will likely result", "would", "believe", "may", "expect", "will continue", "anticipate", "estimate", "intend", "plan", "contemplate", seek to", "future", "objective", "goal", "likely", "project", "should", "potential", "will pursue", and similar expressions of such expressions may constitute "forward-looking statements". These forward looking statements involve a number of risks, uncertainties and other factors that could cause actual results to differ materially from those suggested by the forward-looking statements. These risks and uncertainties include, but are not limited to our ability to successfully implement our strategy, our growth and expansion plans, obtain regulatory approvals, our provisioning policies, technological changes, investment and business income, cash flow projections, our exposure to market risks as well as other risks. The Company does not undertake any obligation to update forward-looking statements to reflect events or circumstances after the date thereof.



Contents

- Q4FY23 at glance
- FY23 at glance
- Financial Performance
- Business Strategy
- New Initiatives
- ESG Engagement
- Team APL Apollo



Q4FY23 at a Glance



650k ton
Sales Volume
18% yoy increase



₹ 44.3 Bn
Revenue
5% yoy increase



₹3.2 Bn
EBITDA
21% yoy increase



₹ 4,970
EBITDA/ton
3% yoy increase



₹249 Mn
Interest Cost
147% yoy increase



₹ 2.0 Bn
Net profit
24% yoy increase



54%
**Value Added
Sales mix**
Q4FY22 was 60%



₹ 2.5Bn
Cash profit
30% yoy increase



₹ 468Mn
Depreciation
68% yoy increase



7.3%
EBITDA Margin
6.3% in Q4FY22



4.6%
Net Margin
3.9% in Q4FY22

FY23 at a Glance

 **2,280k ton**
Sales Volume
30% yoy increase

 **₹161.7Bn**
Revenue
24% yoy increase

 **₹10.2Bn**
EBITDA
8% yoy increase

 **₹ 4,481**
EBITDA/ton
17% yoy decrease

 **₹671Mn**
Interest Cost
51% yoy increase

 **₹6.4Bn**
Net profit
15% yoy increase

 **56%**
Value Added
Sales mix
FY22 was 63%

 **₹9.7Bn**
Op. Cash Flow
FY22 was Rs 6.5 Bn

 **5 days**
Net WC days
FY22 was 7 days

 **29.2%**
ROCE
FY22 was 34.6%

 **23.5%**
ROE
FY22 was 28.9%

 **₹2.4Bn**
Net debt
FY22 was Rs 2 Bn

Note 1: Sales Volume and Financials are on consolidated basis

Note 2: Capital employed for ROCE computed as Total assets less Current Liabilities & Cash

Highest ever Quarterly Sales Volume/EBITDA

| Profit & Loss (Rs mn) | Q1 FY21 | Q2 FY21 | Q3 FY21 | Q4FY21 | Q1FY22 | Q2FY22 | Q3FY22 | Q4FY22 | Q1FY23 | Q2FY23 | Q3FY23 | Q4FY23 |
|-----------------------|---------|---------|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Volume (k ton) | 238 | 481 | 486 | 435 | 373 | 427 | 403 | 552 | 423 | 602 | 605 | 650 |
| Net Sales | 11,098 | 22,021 | 26,009 | 25,870 | 25,343 | 30,839 | 32,304 | 42,147 | 34,386 | 39,692 | 43,271 | 44,311 |
| EBITDA | 711 | 1,691 | 2,321 | 2,064 | 2,547 | 2,222 | 2,023 | 2,661 | 1,939 | 2,319 | 2,729 | 3,229 |
| EBITDA/ton (Rs) | 2,982 | 3,514 | 4,780 | 4,742 | 6,825 | 5,199 | 5,023 | 4,823 | 4,587 | 3,850 | 4,510 | 4,970 |
| PBT | 309 | 1,382 | 1,995 | 1,772 | 2,256 | 1,956 | 1,721 | 2,391 | 1,629 | 2,023 | 2,290 | 2,692 |
| Net Profit | 168 | 921 | 1,320 | 1,192 | 1,684 | 1,461 | 1,279 | 1,766 | 1,207 | 1,502 | 1,692 | 2,018 |

FINANCIAL PERFORMANCE



De-commoditizing Product Portfolio

APL APOLLO TUBES

| Product Category | Application | Q4FY22 | | | Q1FY23 | | | Q2FY23 | | | Q3FY23 | | | Q4FY23 | | |
|-------------------|-----------------------|------------|------------|--------------|------------|------------|--------------|------------|------------|--------------|------------|------------|--------------|------------|------------|--------------|
| | | Sales Mix | Volume | EBITDA /Ton |
| | | (%) | (KTon) | (Rs) |
| Apollo Structural | Heavy Section | 7 | 40 | 7,835 | 8 | 33 | 7,028 | 7 | 41 | 6,926 | 8 | 46 | 7,568 | 6 | 39 | 8,437 |
| | Super Heavy Section | | 0 | | | 0 | | | 0 | | | 0 | | 0 | 2 | 9,604 |
| | Light Structures | 17 | 96 | 5,852 | 14 | 59 | 5,081 | 18 | 109 | 5,344 | 22 | 132 | 4,059 | 17 | 108 | 6,256 |
| | General Products | 40 | 223 | 1,955 | 39 | 165 | 1,614 | 46 | 276 | 1,388 | 44 | 264 | 2,284 | 46 | 299 | 2,612 |
| Apollo Z | Rust-proof structures | 30 | 166 | 7,134 | 33 | 141 | 7,224 | 23 | 137 | 6,816 | 21 | 125 | 7,492 | 25 | 163 | 7,327 |
| | Coated Products | | 0 | 5,040 | 2 | 7 | 5,001 | 2 | 12 | 9,401 | 2 | 10 | 3,146 | 1 | 10 | 4,424 |
| Apollo Galv | Agri/Industrial | 5 | 26 | 5,040 | 4 | 18 | 5,005 | 4 | 27 | 4,966 | 5 | 28 | 5,659 | 4 | 27 | 6,780 |
| Total | | 100 | 552 | 4,823 | 100 | 423 | 4,587 | 100 | 602 | 3,850 | 100 | 605 | 4,510 | 100 | 650 | 4,970 |

*ABPL (New Raipur) products have been re-classified in Super Heavy, Light and Coated Products

De-commoditizing Product Portfolio

| Product Category | Application | FY19 | | | FY20 | | | FY21 | | | FY22 | | | FY23 | | |
|---------------------------|-----------------|------------|--------------|----------------|------------|--------------|----------------|------------|--------------|----------------|------------|--------------|----------------|------------|--------------|--------------|
| | | Sales Mix | Volume | EBITDA/ Ton | Sales Mix | Volume | EBITDA/Ton |
| | | (%) | (KTon) | (Rs) | (%) | (KTon) | (Rs) |
| Apollo Structural | Heavy | 6 | 80 | 3,775 | 6 | 101 | 4,000 | 6 | 95 | 4,721 | 7 | 121 | 7,422 | 7 | 160 | 7,505 |
| | Super Heavy | | | | - | | | - | | | - | | | - | 2 | 9,604 |
| | Light | 8 | 108 | 3,707 | 8 | 134 | 4,778 | 21 | 352 | 5,649 | 19 | 336 | 6,683 | 18 | 407 | 5,134 |
| | General | 58 | 777 | 1,615 | 55 | 898 | 1,361 | 43 | 713 | 1,658 | 37 | 647 | 2,145 | 44 | 1,005 | 2,025 |
| Apollo Z | Rust-proof | 21 | 283 | 5,568 | 25 | 401 | 5,279 | 25 | 409 | 6,692 | 33 | 575 | 7,710 | 25 | 567 | 7,214 |
| | Coated | - | | | - | | | - | | | 0 | 0 | | 2 | 39 | 5,731 |
| Apollo Galv | Agri/Industrial | 7 | 92 | 4,362 | 6 | 99 | 3,952 | 4 | 71 | 6,040 | 4 | 76 | 6,442 | 4 | 99 | 5,667 |
| Apollo Build/ New Raipur* | Coated Products | 0 | 0 | - | 0 | 0 | - | 0 | 0 | - | - | - | - | - | - | - |
| Total | | 100 | 1,339 | 2,933 | 100 | 1,633 | 2,923 | 100 | 1,640 | 4,138 | 100 | 1,755 | 5,386 | 100 | 2,280 | 4,481 |

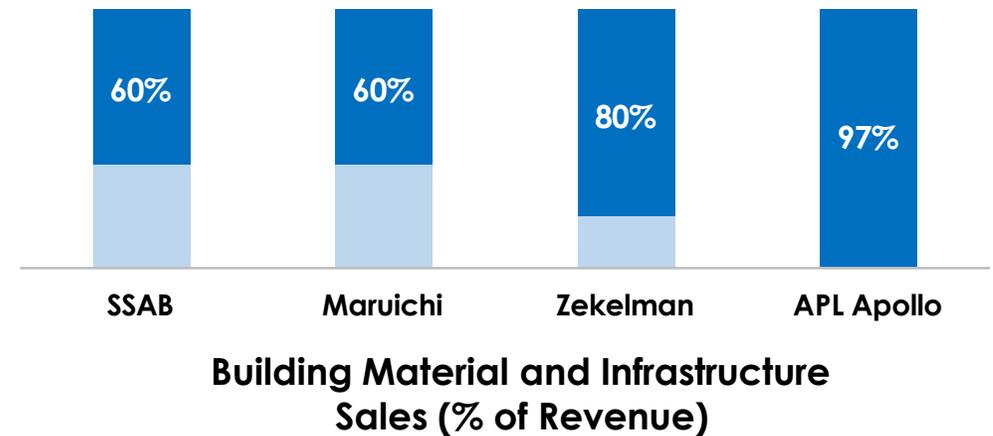
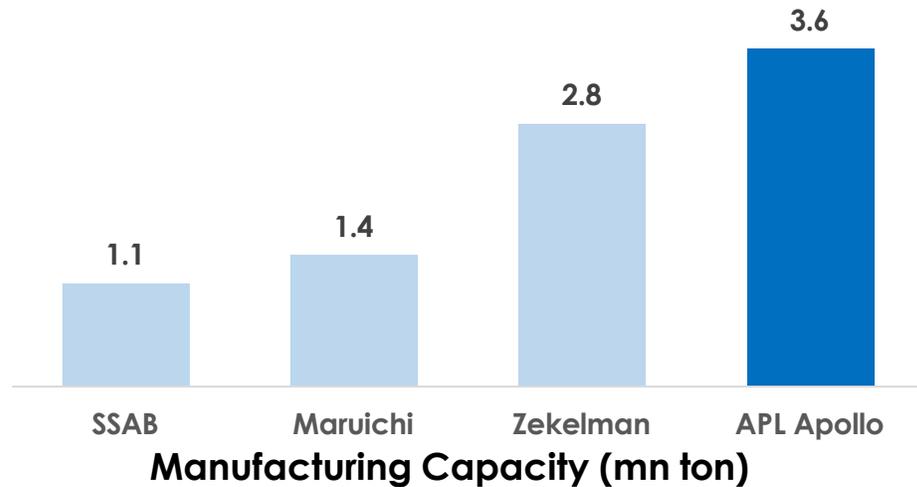
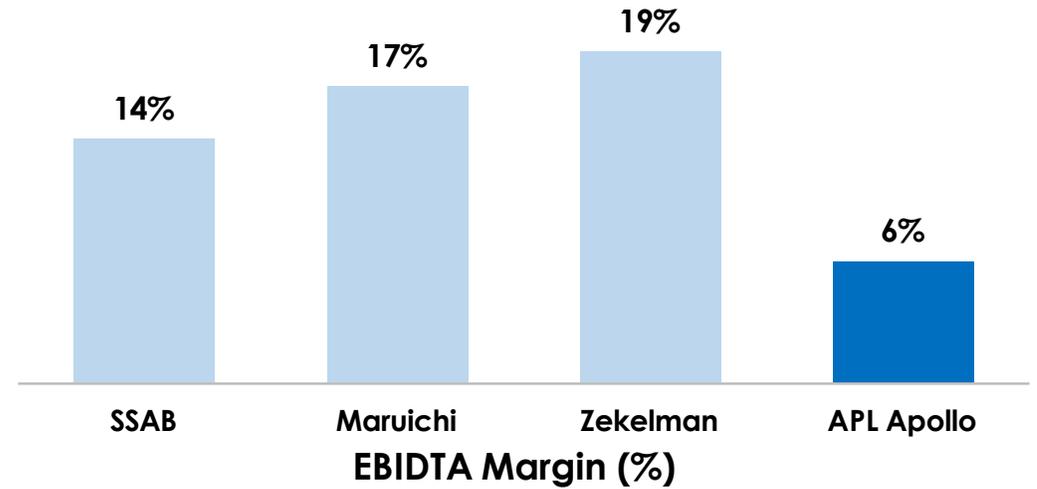
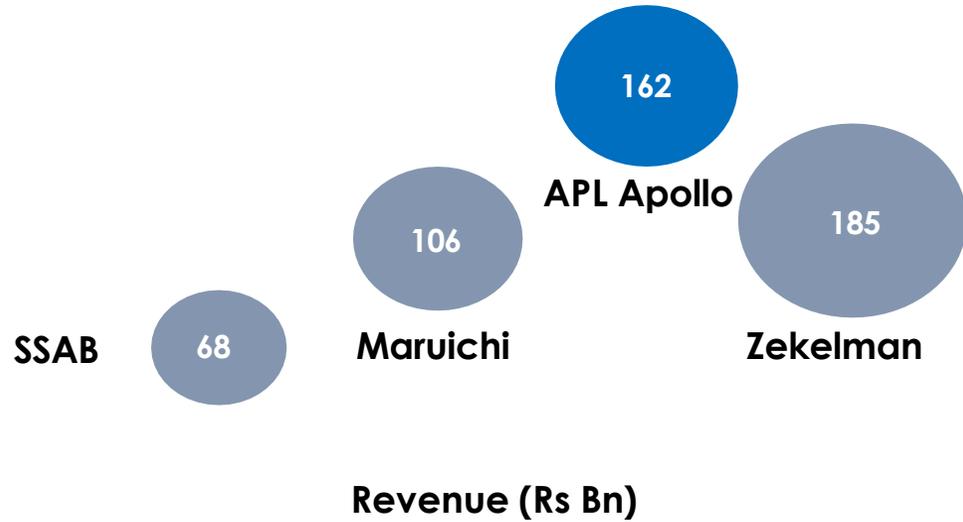
APL APOLLO TUBES

Standard products with EBITDA around Rs 2,000/ Ton

Value added products with EBITDA more than Rs 4,000/Ton

*ABPL (New Raipur) products have been re-classified in Super Heavy, Light and Coated Products

Global Peer Benchmarking

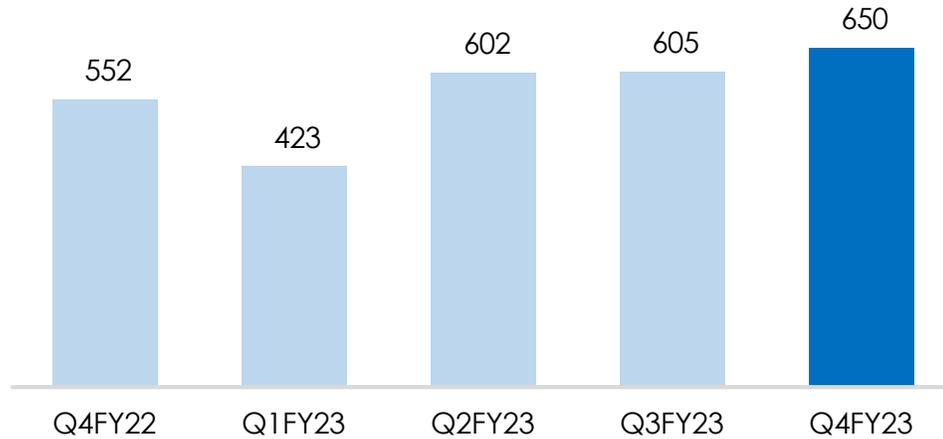


APL APOLLO TUBES

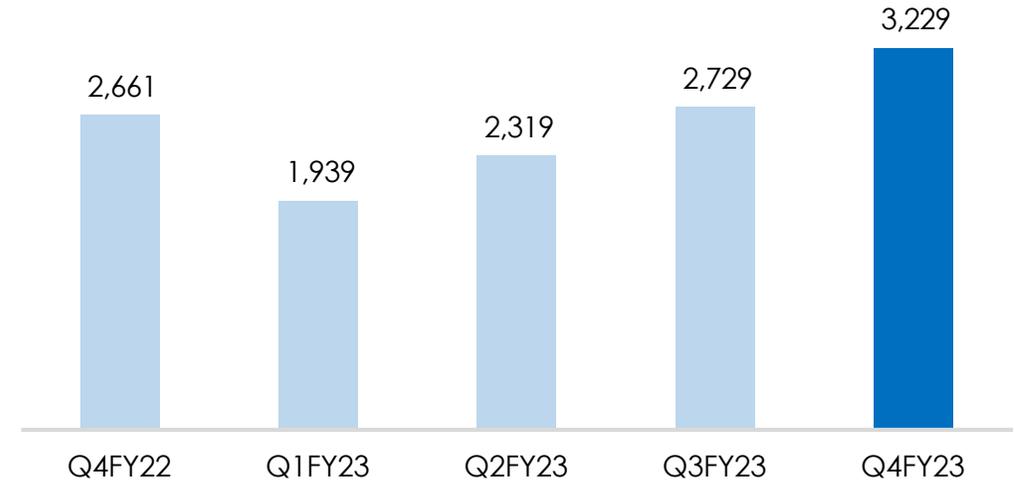
Based on latest financial available data

Growing Strength to Strength

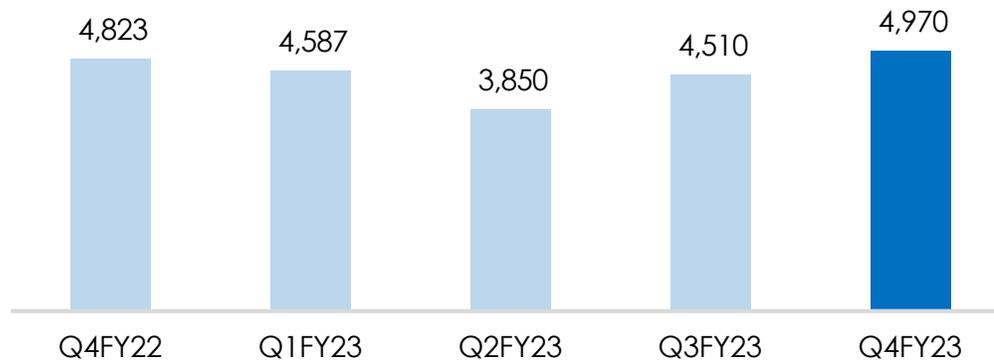
Volume (k'ton)



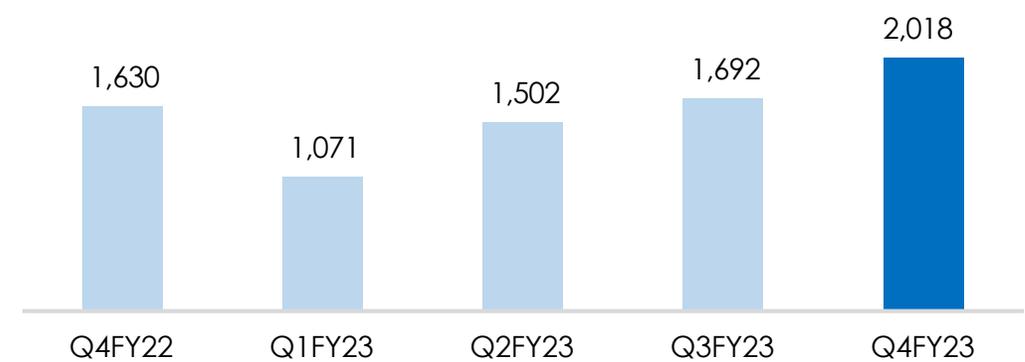
EBITDA (Rs Mn)



EBITDA/Ton (Rs)



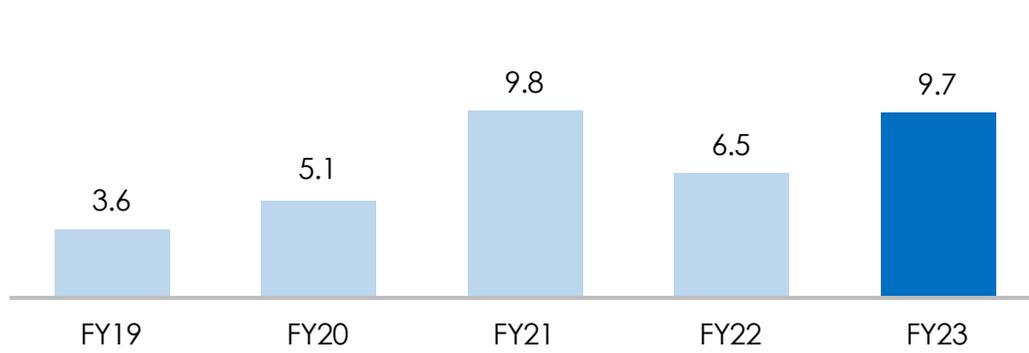
Net Profit (Rs Mn)



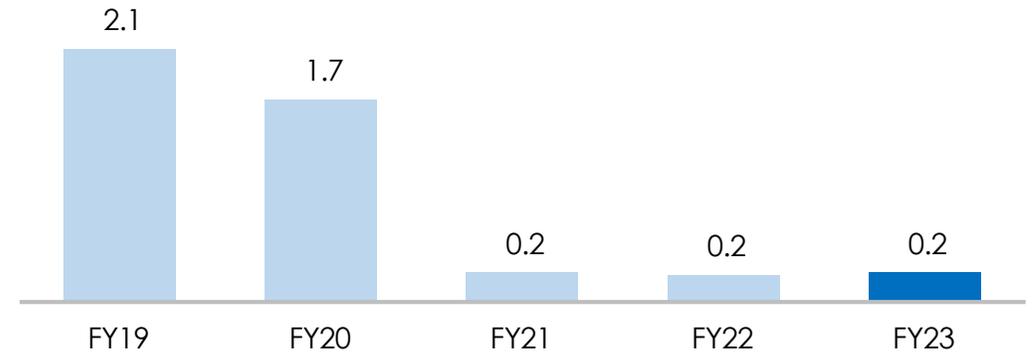
1. Sales Volume and Financials are on consolidated basis
2. EBITDA has been calculated without other income

Growing Strength to Strength

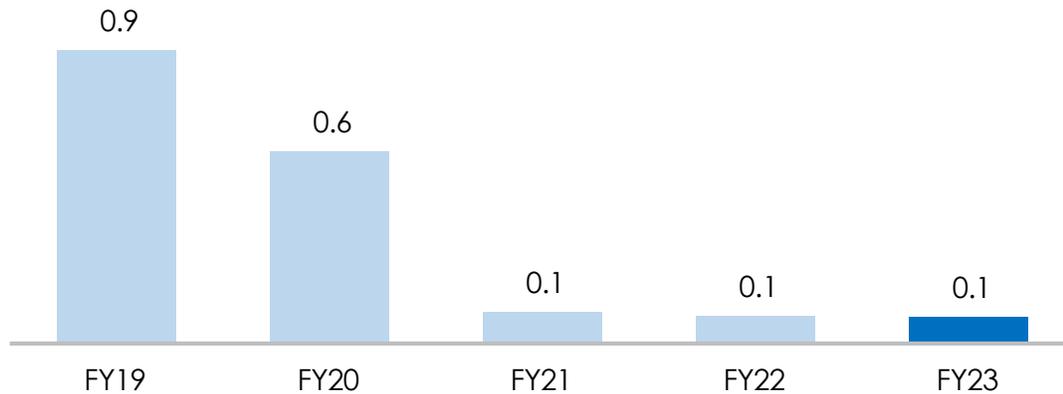
Operating Cash Flow (Rs Bn)



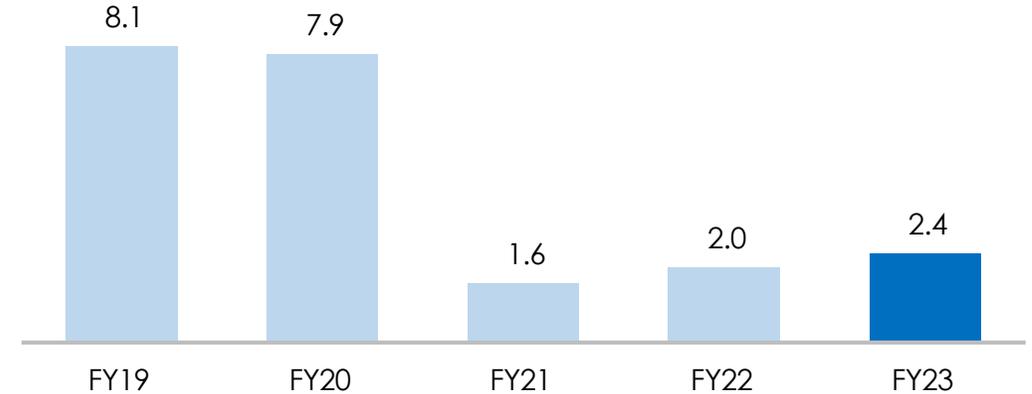
Net Debt/EBITDA (x)



Net Debt/ Equity (x)

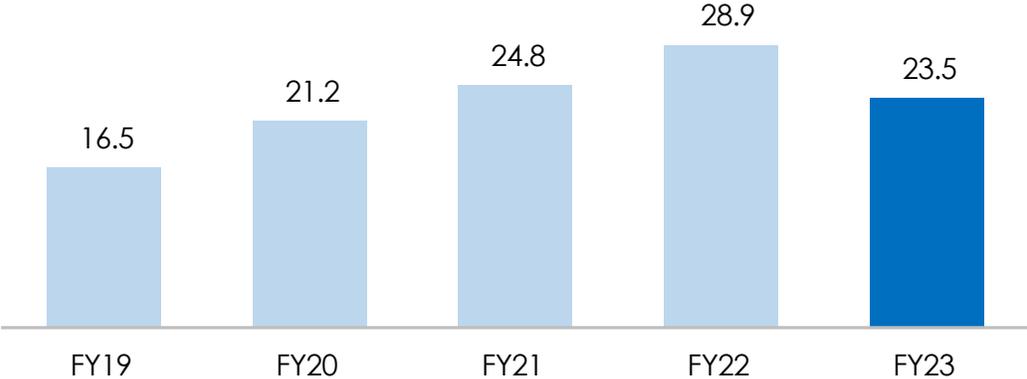


Net Debt (Rs Bn)

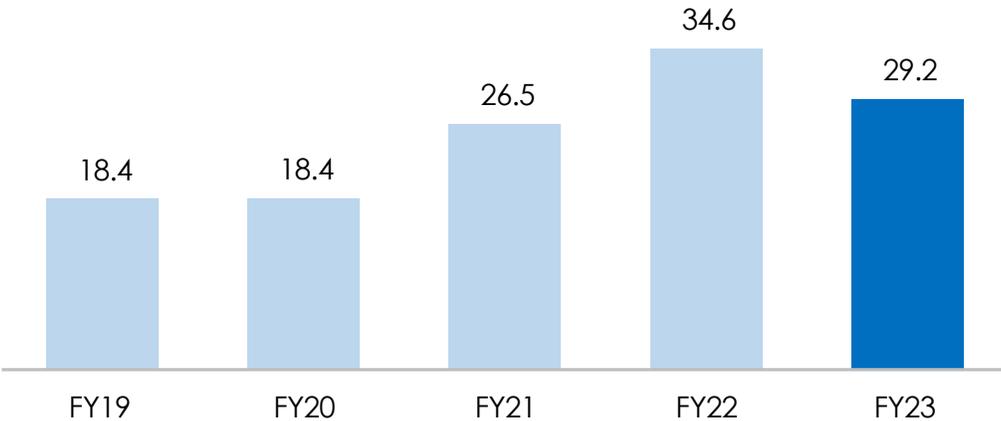


Growing Strength to Strength

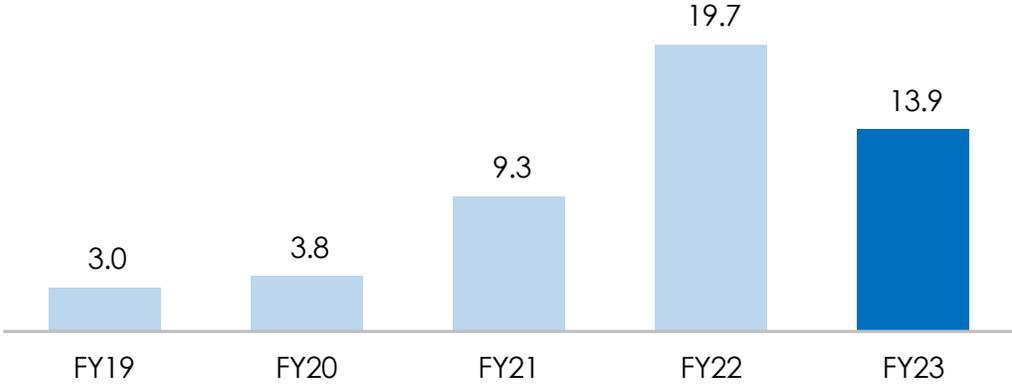
ROE (%)



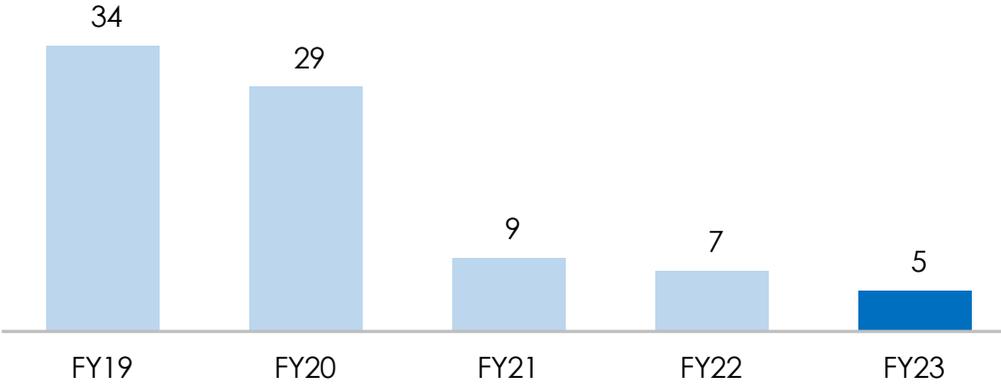
ROCE (%)



Interest Coverage Ratio (x)



Net Working Capital Days

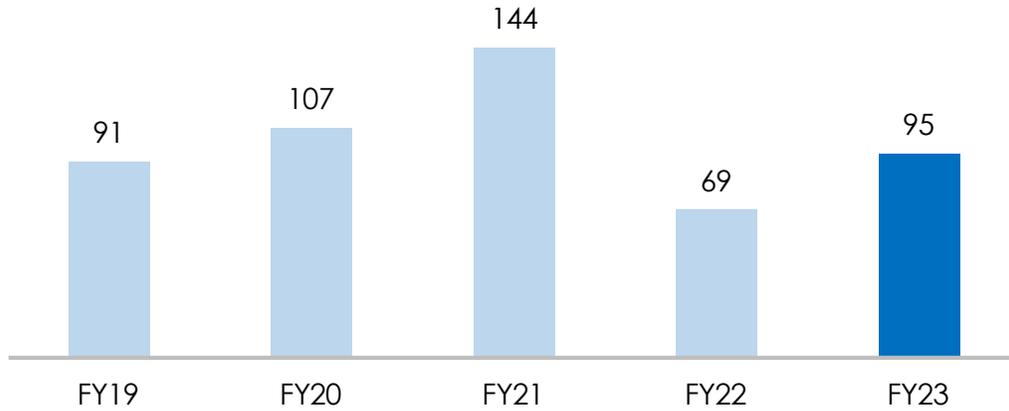


APL APOLLO TUBES

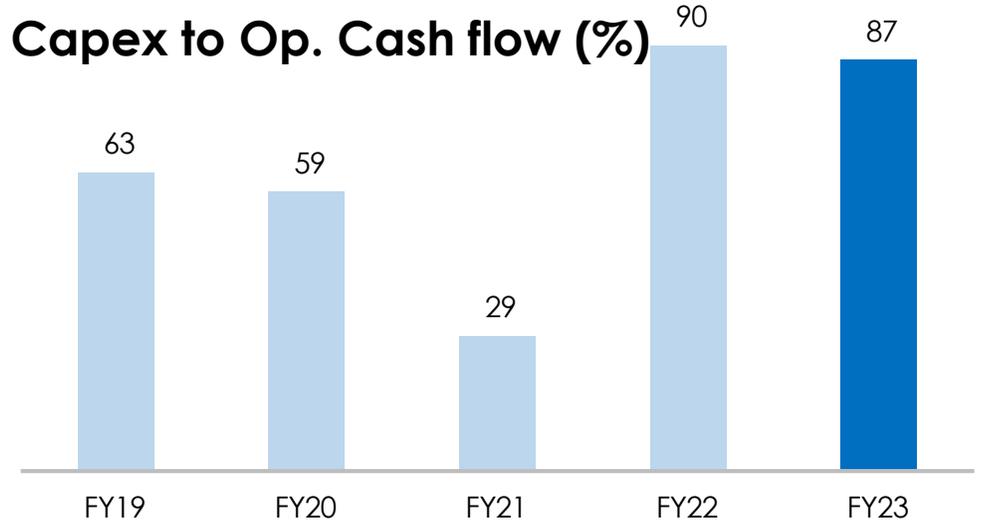
Note: Capital employed for ROCE is computed as Total assets less Current Liabilities & Cash

Growing Strength to Strength

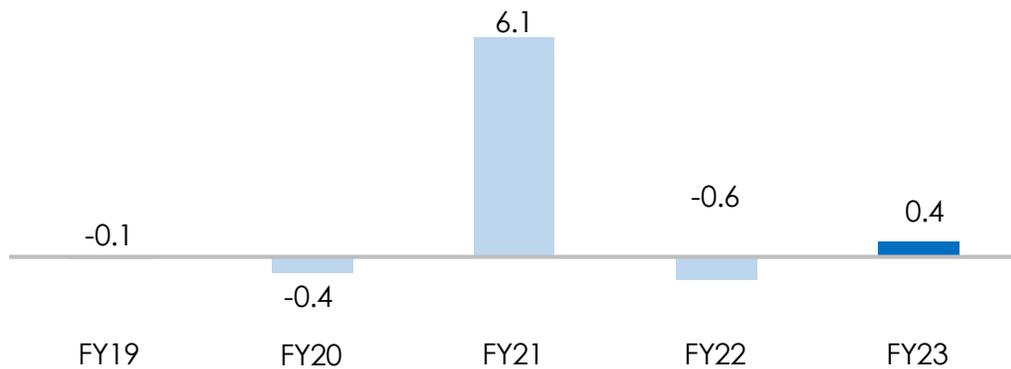
Operating Cashflow to EBITDA (%)



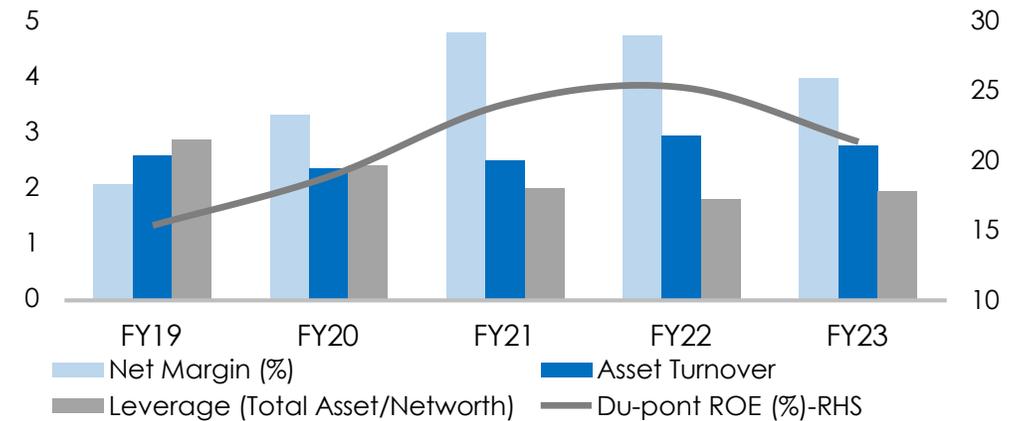
Capex to Op. Cash flow (%)



FCF (Rs Bn)



Du-Pont ROE (%)



Profit & Loss Statement (Consol)

| Particulars (Rsm) | Q4FY22 | Q1FY23 | Q2FY23 | Q3FY23 | Q4FY23 | FY22 | FY23 |
|-----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Sales Volume (k Ton) | 552 | 423 | 602 | 605 | 650 | 1,755 | 2,280 |
| Net Revenue | 42,147 | 34,386 | 39,692 | 43,271 | 44,311 | 1,30,633 | 1,61,660 |
| Raw Material Costs | 36,829 | 29,915 | 34,747 | 37,693 | 37,823 | 1,12,231 | 1,40,178 |
| Employee Costs | 410 | 445 | 468 | 554 | 595 | 1,530 | 2,062 |
| Other expenses | 2,247 | 2,086 | 2,158 | 2,296 | 2,665 | 7,419 | 9,204 |
| EBITDA | 2,661 | 1,939 | 2,319 | 2,729 | 3,229 | 9,452 | 10,215 |
| EBITDA/ton (Rs) | 4,823 | 4,587 | 3,850 | 4,510 | 4,970 | 5,386 | 4,481 |
| Other Income | 110 | 83 | 116 | 93 | 180 | 405 | 472 |
| Interest Cost | 101 | 100 | 136 | 186 | 249 | 445 | 671 |
| Depreciation | 279 | 294 | 276 | 345 | 468 | 1090 | 1,383 |
| Tax | 625 | 422 | 521 | 598 | 673 | 2,133 | 2,214 |
| Net Profit | 1,766 | 1,207 | 1,502 | 1,692 | 2,018 | 6,190 | 6,419 |
| *Trading Revenue | 497 | 235 | 765 | 1,084 | 785 | 2,505 | 2,869 |

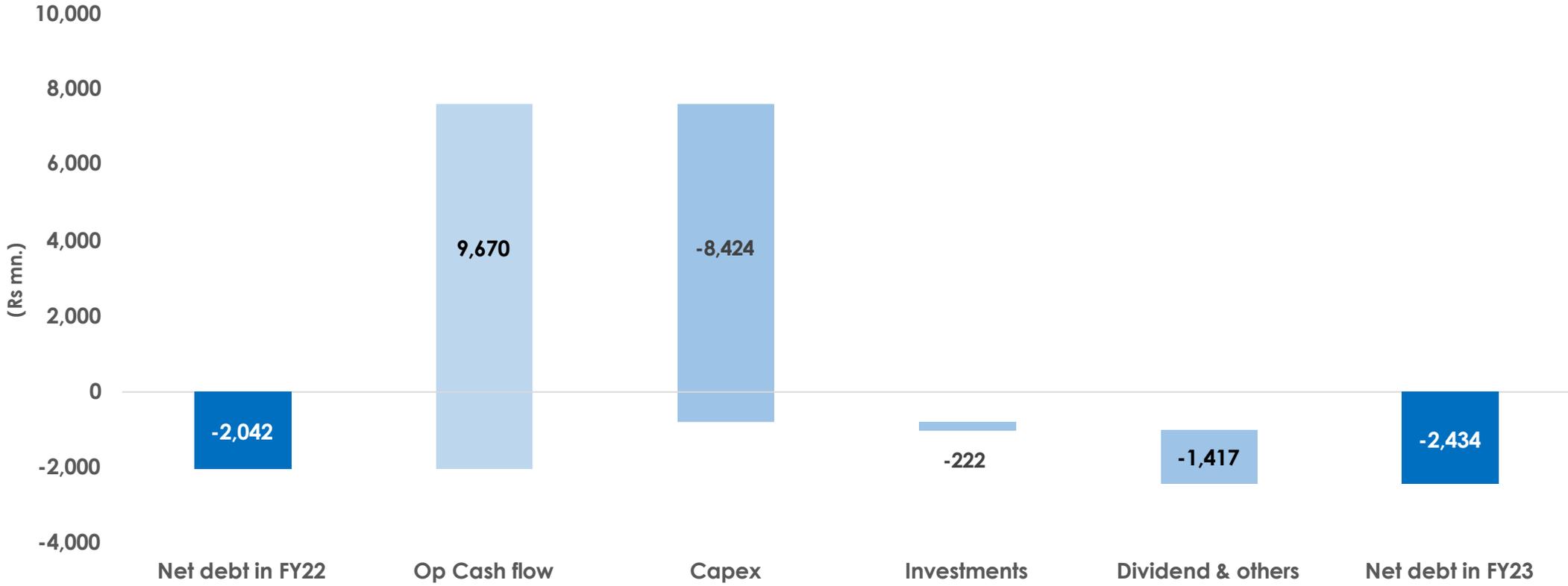
Balance Sheet & Cash flow(Consol)

| Balance Sheet - Assets (Rs mn) | FY23 | FY22 |
|---------------------------------------|---------------|---------------|
| Cash & Bank Balance | 6,295 | 3,764 |
| Receivables | 1,374 | 3,417 |
| Inventories | 14,799 | 8,472 |
| Other current assets | 3,110 | 2,617 |
| Fixed assets (net) | 27,232 | 21,039 |
| Right to use Assets | 925 | 870 |
| Investments | 960 | 862 |
| Other assets/goodwill | 3,821 | 3,367 |
| Total Assets | 58,516 | 44,409 |
| Balance Sheet - Liabilities (Rs mn) | FY23 | FY22 |
| Trade payables | 15,970 | 10,595 |
| Other current liabilities | 1,185 | 1,365 |
| Debt | 8,729 | 5,806 |
| Others | 2,576 | 2,119 |
| Minority Interest/Provision | 0 | 0 |
| Shareholders' funds | 30,056 | 24,525 |
| Total Equity & Liabilities | 58,516 | 44,409 |

| Cashflow Statement (Rs mn) | FY23 | FY22 |
|----------------------------|---------------|---------------|
| EBITDA | 10,215 | 9,452 |
| Accounts receivables | 1,990 | -2,108 |
| Inventory | -6340 | -887 |
| Other WC changes | 5,494 | 1,638 |
| Tax | -2,161 | -1,993 |
| Other Income | 472 | 405 |
| Operating cash flow | 9,670 | 6,506 |
| Capex | -8,424 | -5,869 |
| Investments | -222 | -871 |
| Interest | -602 | -407 |
| Free cash flow | 423 | -640 |
| Dividend payments | -875 | 0 |
| Capital increase | 27 | 70 |
| Others | 32 | 152 |
| Net change in cash flow | -393 | -418 |
| Net debt beginning | -2,042 | -1,624 |
| Net debt end | -2,434 | -2,042 |

* Rs 2.77bn FD is classified under Other current Assets due to maturity of less than 365days

Consol. Cash Flow Bridge (Rs Mn.)



APL APOLLO TUBES

✓ Business continues to generate strong operational cash flows

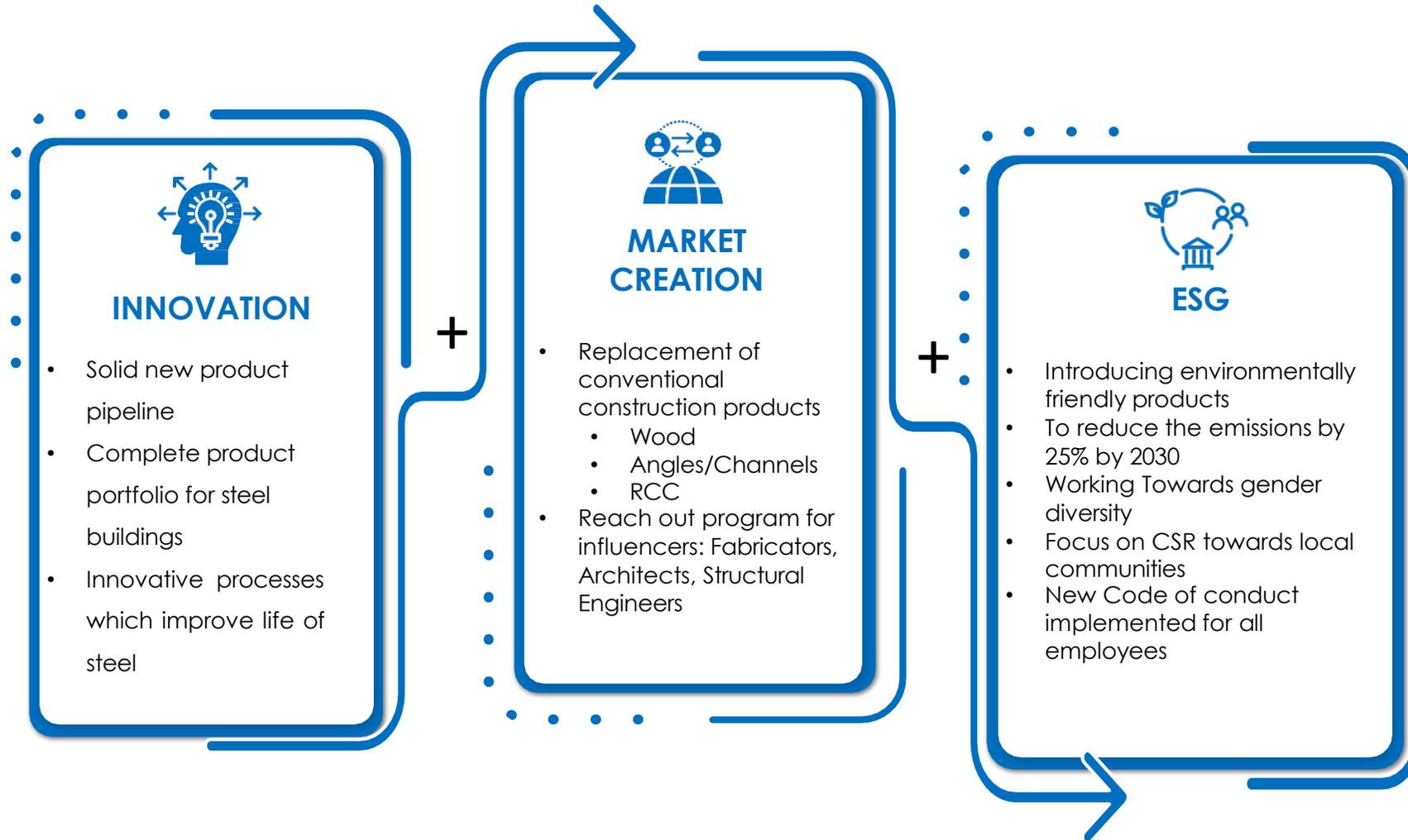
✓ Capex being funded from internal cash flows

✓ Net debt to EBITDA at 0.2x

BUSINESS STRATEGY



APL Apollo Vision



INNOVATION

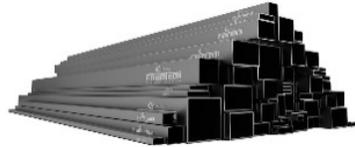
Mission: World's only company to make steel tubes with size range of 10x10mm to 1000x1000mm and thickness range of 0.23 mm to 40mm



What we have done so far as the first company

Indian Markets

Structural steel square and rectangular tubes:



Structural application in construction Industry

Pre-galvanized structural steel tubes (**Apollo Z**):



Corrosive resistant structural applications

DFT (Direct Forming Technology)



Faster TAT with tailor made sizes

300x300mm dia structural steel tubes:



Heavy structural application in Construction industry

Inline galvanizing (**ILG**)



Superior corrosive resistant product strong demand in coastal market

What we have done so far as the first company

Global Markets

Chaukhat (Door frame shape tubes)



Replacing Conventional wooden door frames

Rectangular section of 1:11
(Length to Breadth)



Replacing Conventional wooden sections

16 Registered Patents

| | | | |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
|  |  |  |  |
| Double Door Chaukhat Tube | Apollo Signature | Four Double Door Chaukhat Tube | Single Door Chaukhat Tube |
|  |  |  |  |
| Elliptical Tube for electric transformers | D Section for Handrail/Fence | Handrail Tube | Window Frame Tube (L) |
|  |  |  |  |
| Window Frame Tube (T) | Window Frame Tube (Z) | Reflector Tube | Oval Tube for Gym equipment |
|  |  |  |  |
| Plank Tube | Octagon Tube for Furniture | Fencing Tube | Checked Section |

New Product Pipeline from Raipur plant

World's 1st thicker color coated products



Superior corrosion resistant, high load bearing with aesthetics

World's 1st Color coated structural steel tubes



Superior corrosion resistant with aesthetics

India's 1st 500x500mm dia structural steel tubes



Replacing RCC structures/columns in heavy construction

India's 1st and World's 2nd 1,000x1,000mm



Replacing RCC structures/columns in heavy construction

India's 1st CRCA Black annealed tube



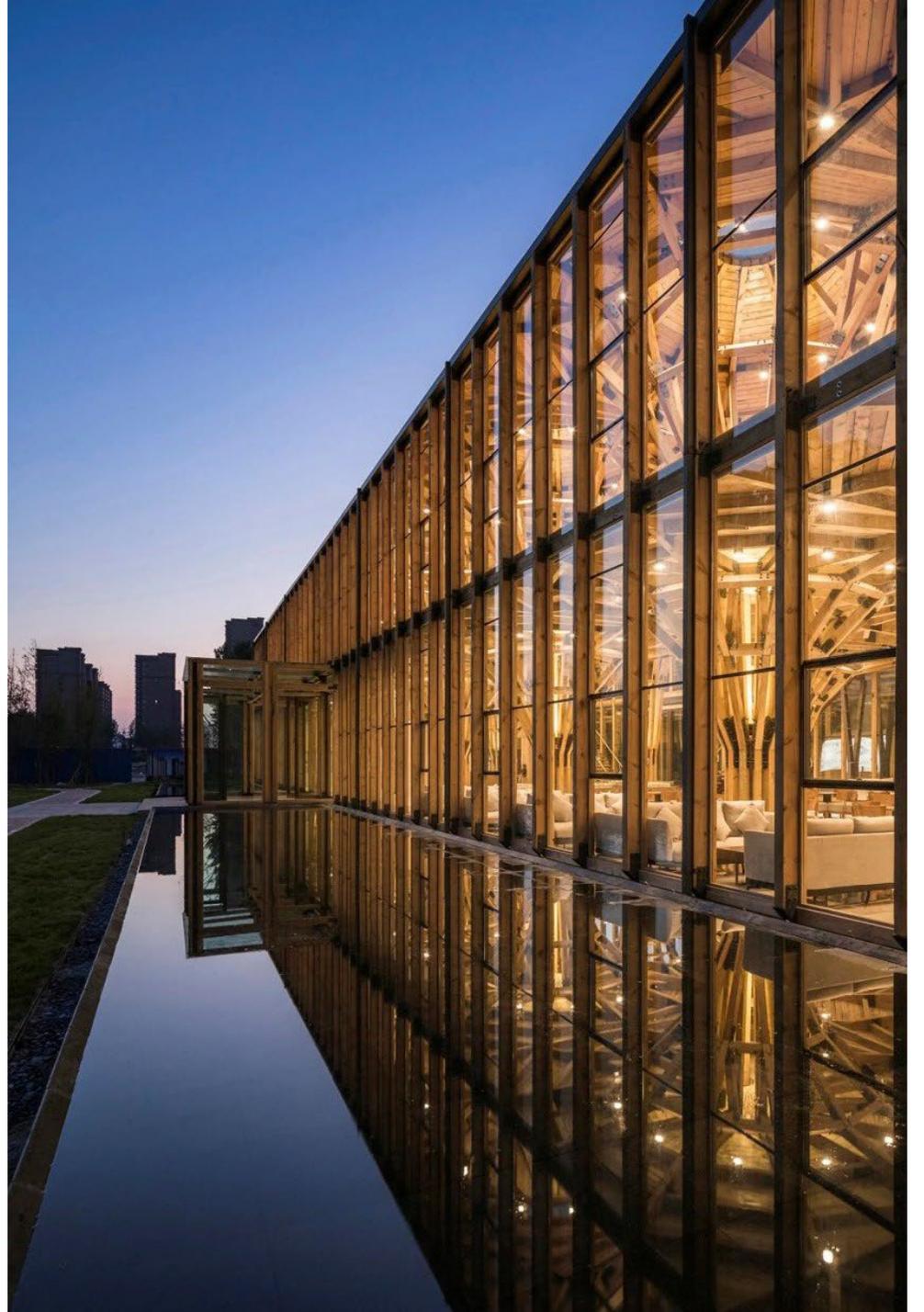
High tensile light structural application; bendable; superior rust proof properties

India's 1st AluZinc tubes



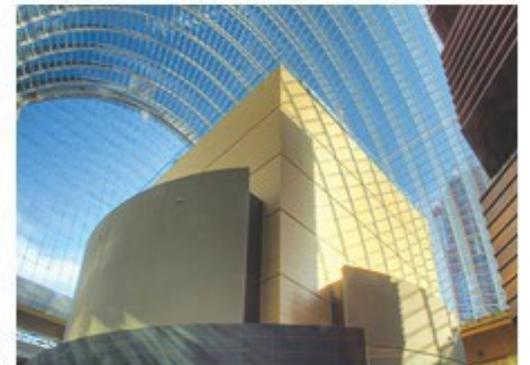
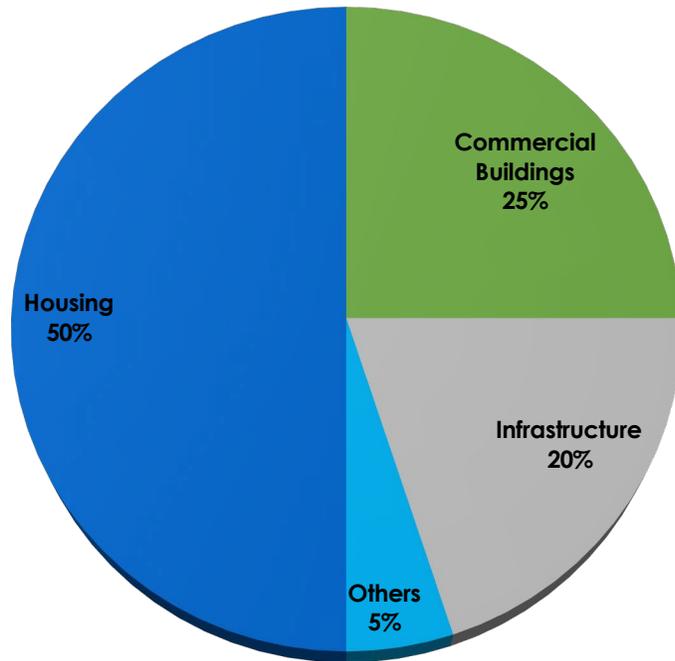
Superior rust proof properties and better life

MARKET CREATION



Structural Steel Tube Applications

Application Mix



How Have We Created Market..

APL APOLLO TUBES

| Conventional Construction Products | Applications | Why Structural Steel Tube replaces these products? |
|------------------------------------|-------------------------------------------|-------------------------------------------------------|
| Steel Angle/Channels | Structural support, Towers infrastructure | Uniform Strength, Lower steel consumption |
| Wood | Furniture, Door Frames, Planks | Cost Effective, Termite Proof, Environmental Friendly |
| Aluminum Profiles | Facades & Glazing | Cost Effective, Higher Strength |
| Reinforced Cement Concrete | Construction of Buildings | Faster Construction Environmental Friendly |
| Fabricated Metal Sheet | Pre-Engineered Steel Buildings | Lower steel consumption Reduces overall project cost |

How to replace the conventional products??



Low Diameter Steel Tubes/Low Load Bearing



High Diameter Steel Tubes/High Load Bearing

REVOLUTIONIZING CONSTRUCTION INDUSTRY



Tubular Construction Process flow



Tube Manufacturing

Production of 6,000 ton ERW tubes per day at plants of APL Apollo



Fabrication

Tubes are sand blasted, then connected using connectors



Civil Foundation

Civil Foundation & Arrangement of anchor bolts at site to install tube columns



Hospital Building

Hospital



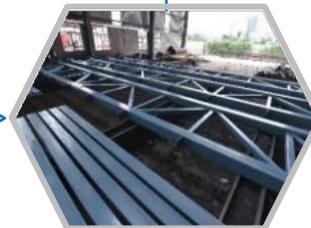
CTL Line

Cutting of tubes into desired length at APL Apollo plant to minimise wastages



Painting

Connected structures are painted



Site Erection

Zero on-site fabrication/Welding; Erection using bolting connections



Transfer of cut to length tubes to Fabricator's workshop



Transfer of structure parts to the site

Delhi Hospitals- Proof of Concept



Geeta Colony

Fabrication & Erection
1,000 ton



Sultanpuri

Fabrication & Erection
600 ton



Shalimar Bagh

Fabrication & Erection
3,300 ton



GTB Hospital

Fabrication & Erection
1,800 ton



Sarita Vihar

Fabrication & Erection
900 ton

**Revolution in
Construction**

Applications

- High Rise Buildings
 - Hospitals, Housing, Schools, Courts, Hotels/Malls/Offices
- Warehouses/Cold Storage/Food Parks
- Factory Buildings/Process Structures
- Aviation Hangers
- Data Centres

45
projects

42mn sq. ft.
Visibility

220,000 ton
heavy structural steel
tubes

Ongoing enquiries



OUR BIGGEST EVER

(NEW RAIPUR PANT)



Raipur Plant Update



HIGHLIGHTS

- Upcoming 400 Acre Raipur plant progressing on expected lines
- Project commenced in phases from H2FY23
- 100% value added products
- Total capex **Rs8-10bn**; **c90%** already incurred

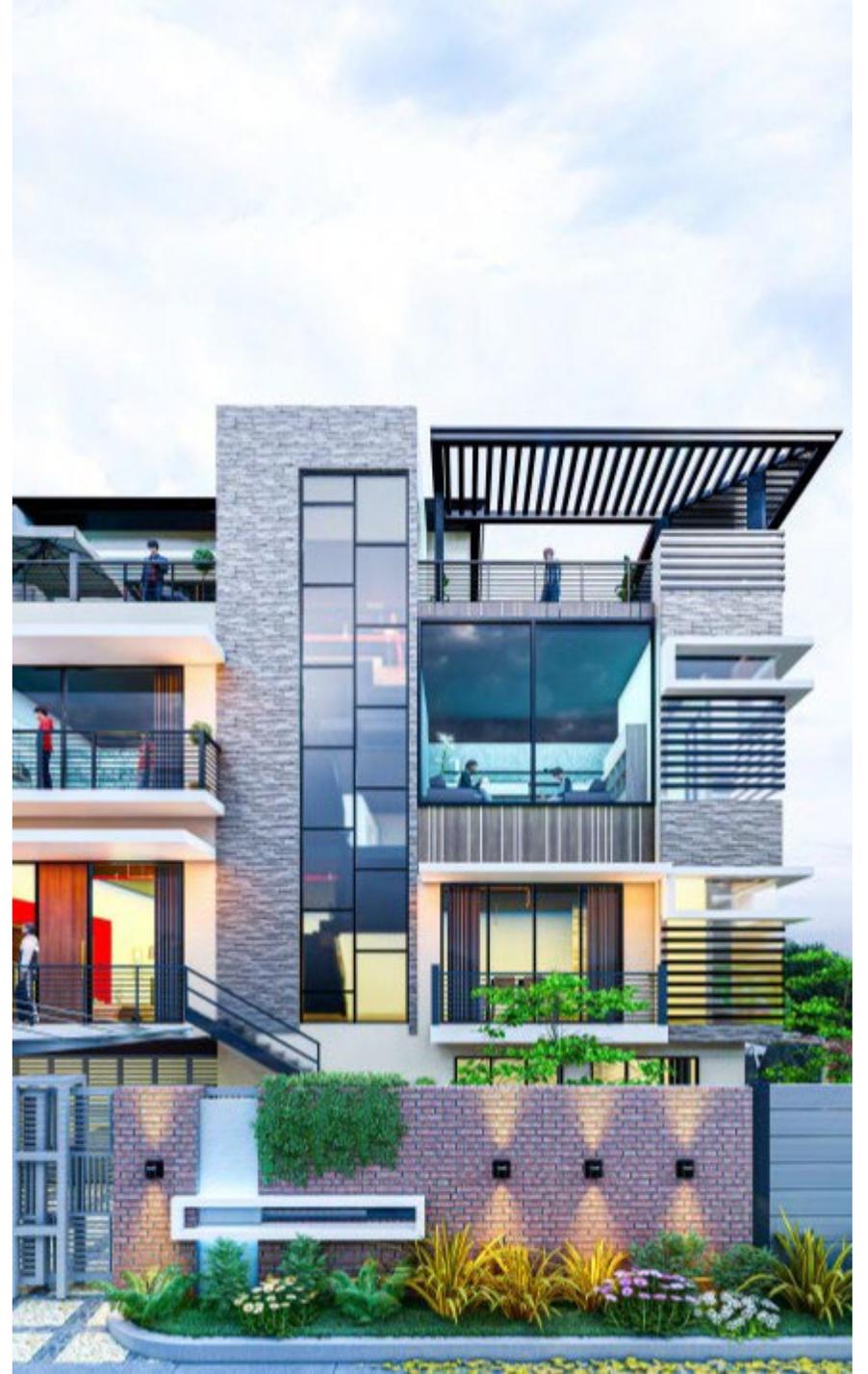
Raipur Plant Update

APL APOLLO TUBES



Area of 1.5mn square feet being built using 100% Apollo Column Tubes

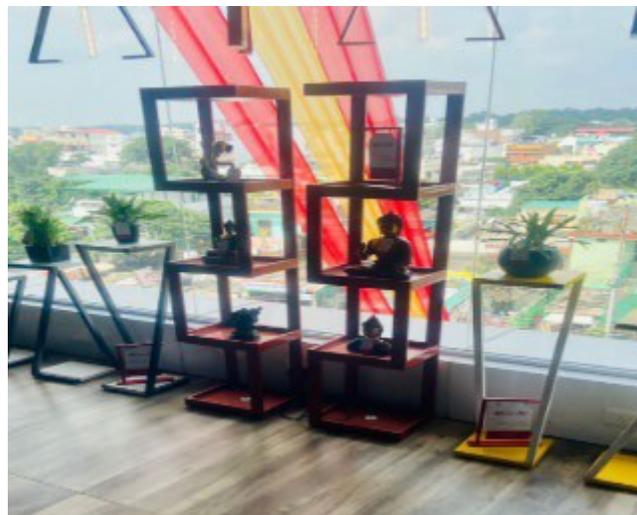
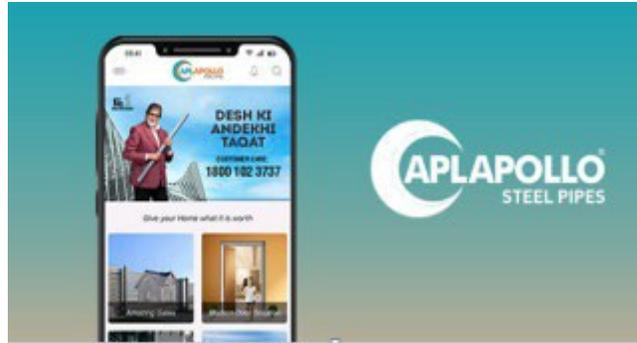
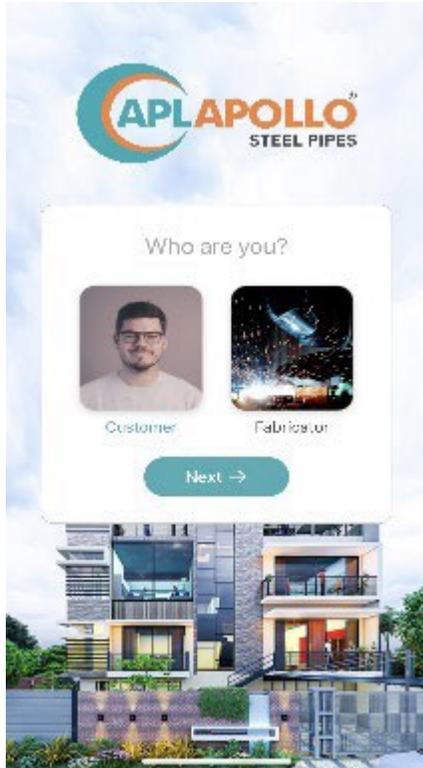
NEW INITIATIVES



B2C Tech App



APL APOLLO MOBILE - APPLICATION LAUNCHED



30,000+ Fabricators enrolled

145,000+ Total Downloads

400+ Designs

16 Patents registered



APL Apollo's ESG Transformation Journey

DJSI Scoring

APL APOLLO TUBES

MEMBER OF
Dow Jones
Sustainability Indices
In Collaboration with RobecoSAM

APL APOLLO
STEEL PIPES

DJSI FY2022 SCORE

APL APOLLO TUBES
STANDS AT 80TH
PERCENTILE

(IN THE PEER INDUSTRY COMPRISING OF GLOBAL COMPANIES)
SCORE REACHED A HIGH OF 29 POINTS, ABOVE THE INDUSTRY AVERAGE OF 22

IMPROVEMENT ACROSS AREAS

- Social Dimension
- Governance & Economic Dimension
- Environmental Dimension

**APL APOLLO
SCORED 80TH
PERCENTILE IN FY22**

**We expect better score
this year as we are
improving on ESG
parameters**

Commitment and achievements

Commitments

- Committed to reducing Scope 1&2 emissions by 25% by 2030 E
- Committed to set near term and Net Zero targets by 2050 E
- Renewable energy contribution to be 47% by 2030 from 38% E
- Targeted to increase the female workforce by 1% every year S
- CSR initiatives in the local communities to uplift their lifestyle S
- Skill development trainings and safety trainings S
- Occupational Health and safety assessment of all work force S
- Training on code of conduct to educate each employee G

Achievements

- Introduced new, environmentally friendly products E
- All plants have access to green energy, 2 plants have more than 85% dependency on green energy E
- Almost all plants have rainwater harvesting facilities S
- Zero accidents by providing safety training at sites S
- Attrition rate below 5% S
- Hiring female workforce to achieve gender diversity targets S
- Given emphasis to CSR initiatives in local communities S
- New Code of conduct implemented for all employees G

ESG Developments



Environment

Assessed **Scope 3 emissions** (in addition to Scope 1 & Scope 2)



Social

- 1) **Safety Manual** formulated for all the production facilities and offices
- 2) **New Human Rights policy** incorporated

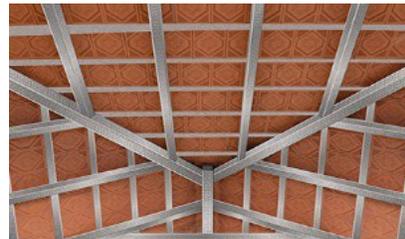


Governance

Code of Conduct: New Code of conduct is formulated for all employees

Front runner for Steel for Green

- APL Apollo is the **1st** Company to innovate readymade Chaukhat, Fence, Plank and Hand rails as **Steel for Green** Concept which replaced conventional wood application in building construction
- Our Products are saving **250,000 trees** every year, going ahead we will be saving more and more trees to keep the planet greener
- Keeping the **Steel for Green** as priority APL is the **1st** Company to innovate **narrow and thicker color coated** galvanized sheets which will save more trees

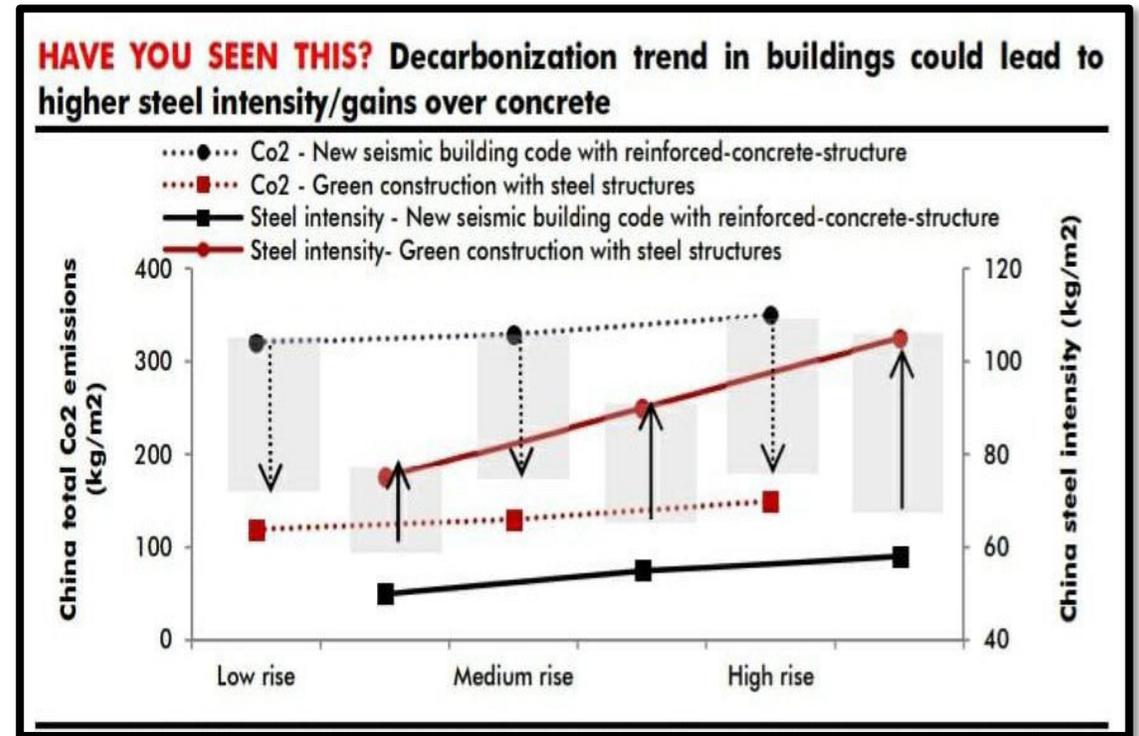


Steel Buildings = Decarbonization

- Construction sector contributes 30% of direct and indirect Co2 emissions
- Structural steel is preferred for steel buildings because steel is
 - Infinitely recyclable
 - Easy to pre-fabricate
 - High volume to weight ratio
 - Lighter/ stronger structure allow gains inn vertical space

Research indicates replacing reinforced concrete with steel structures can reduce emission by 60%

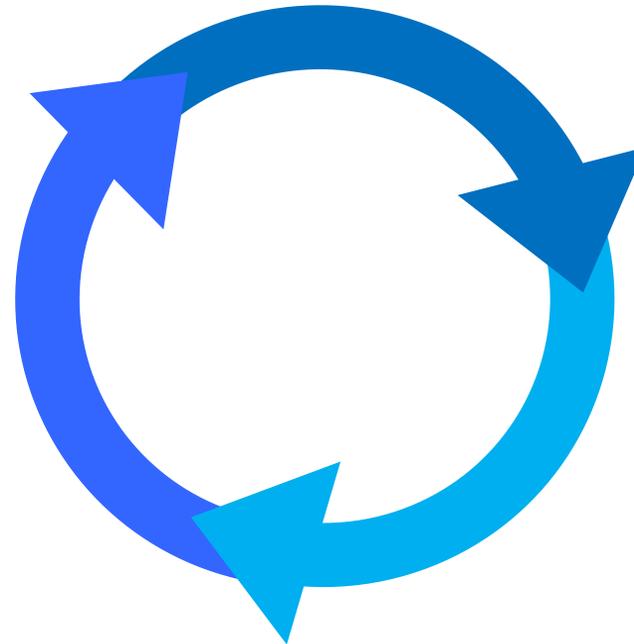
Steel Structure - RCC Structure



Financial Priorities under Strong Governance

Growth

- Profitable Organic Growth
- Commitment to R&D and Talent
- Innovate products to replace conventional construction methods



Earnings

- Drive sustainable EPS growth
- Attain earnings objectives across economic cycles

Capital Allocation

- Drive sustainable EPS growth
- Attain earnings objectives across economic cycles
- Achieve ROCE \geq 30%

Team APL Apollo

DIRECTORS (NON EXECUTIVE)

Neeru Abrol

Director at TCNS Clothing Co Limited & others | Awarded best achiever by ICAI | 26 Yr experience in SAIL

Abhilash Lal

3 decades of professional experience in senior roles across financial services including banking, PE & others

Anil Kumar Bansal

Director of NABARD, Rockland Finesto Ltd & others
4 decades of experience in banking industry

Virendra Singh Jain

Board member of Dalmia Bharat Ltd | Ex-Chairman of SAIL | Ex-Executive Director at IOC

Ashok Kumar Gupta

Steel industry veteran with 4 decades of experience
Worked as MD in APL Apollo in the past

Ameet Gupta

Wholetime Director at Havells India, India's largest electrical goods manufacturer

Rahul Gupta

A promising entrepreneur with an experience of around 5 years in Steel Tubes Manufacturing

Vinay Gupta

More than 20 years of industry experience in the manufacturing and trading pipes, tubes and sheets.

EXECUTIVE TEAM

Sanjay Gupta

CMD

Deepak Goyal

Group CFO
& Director-Operations

Anubhav Gupta

Chief Strategy Officer

Anurag Mehrotra

Chief Human Resource Officer

Ravindra Tiwari

Head-Sales & Marketing

CK Singh

VP - Operations

Thank You

For further information,
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APL Apollo new Corporate office (Work in progress)



APL Apollo new Corporate office to be operational by H1CY23