Twitter Thread by SmartSyncServices.com

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Those who are interested in IEX should read this.

While the market size may grow a lot in the next decade, the government policy risk still stays.

Pic 1: PTC Q4FY21 call

Pic 2: PTC Q1FY22 call

https://t.co/eImnTNEZeX

Rajib Mishra

Now, there are 2 very important products or I say, very interesting products, which Ministry of Power is now trying to launch. And one is the MBED and the second is the -- is not a product, but it is a concept of market coupling. Both have a positive bearing on PTC.

When we analyze our portfolio, if you allow us, I can explain what is the concept of MBED. MBED is a concept where the scheduling of all the power, other than the hydro and renewable, will be done at a national level through a price discovery mechanism and the least cost variable supply should be preferred or would be preferred to supply first. And then subsequently, the pecking order will be decided. So this is a concept which they are trying to -- Ministry of Power is trying for long, and -- but they have given a date, from 1st April 2022 MBED will be -- for phase 1, they will introduce it.

But we have analyzed our portfolio, and it is a pleasure to inform everybody that we have -- after considering our portfolio of long term or medium term, we can easily say that MBED within PTC portfolio, as it is existing today, we are going to get benefit of MBED, even if we are not looking the product in a larger perspective.

In the current scenario also, we are going to get the benefit of it. But of course, MBED will bring a lot of opportunities for a trader like PTC which has a dominant position in driving the market and utilizing this product better. So as far as MBED is concerned, this will be helpful for us, and that's what we have analyzed and we can mention it in this conference.

> Long term investing is a peaceful & slow way of creating wealth.And sometime luck plays its role too.
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> When we researched IEX in 2019 & recommended investors to buy in Mar 2020, we never anticipated such high growth & 470%+ rise in 1.5 Yrs.@MashraniVivekhttps://t.co/qZIdI10ybc pic.twitter.com/v4UYa6fRyn
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> — SmartSyncServices.com (@SmartSyncServ) September 1, 2021