

Twitter Thread by Vivek Shah



Vivek Shah

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#SONACOMS #POSITIONAL - CMP 495

Sonacoms already supplying to #Tesla

(As per the Report)

Is the Highlighted player #OLAElectric?

Technically looks good for 550--600+ (Initially)

SL 438 on C.B

Sona BLW Precision Forgings

19 August 2021

Exhibit 93. Details of 15 EV systems and components development program wins

Sl. Customer	Program Name	End customer location**	Systems and Components	Year of Win	Year of SOP ¹
1 Global Tier 1 Supplier for PVs, CVs, OHVs and EVs - supplying to Global OEM of EVs ¹	Program A1	North America	Differential Gears	FY16	2016
2 Global Tier 1 Supplier for PVs, CVs, OHVs and EVs - supplying to Global OEM of EVs ¹	Program A2	North America	Differential Gears	FY20	2019
3 Global OEM of EVs ¹	Program B1	North America	Differential Assembly	FY18	2019
4 Global OEM of EVs ¹	Program B2	North America	Differential Assembly	FY20	2020
5 Global OEM of EVs ¹	Program B3	China	Differential Assembly	FY21	2020
6 Indian OEM of Electric 2Ws- Scooters ¹	Program C	India	BLDC Motor	FY21	2020
7 Indian OEM of Electric 3Ws ¹	Program D	India	E-Axle	FY21	2021
8 Indian OEM of PVs, CVs, OHVs and EVs ¹	Program E1	India	E-Axle	FY21	2021
9 North American Tier 1 Supplier for PVs, CVs, OHVs, and EVs - supplying to Global OEM of EVs ²	Program F	North America	Differential Gears	FY20	2021
10 Chinese Tier 1 Supplier for EVs - supplying to Global OEM of PVs and EVs ²	Program G	North America	Differential Assembly	FY20	2021
11 European OEM of PVs and EVs ²	Program H	Europe	Differential Assembly	FY21	2022
12 Indian OEM of PVs, CVs, OHVs and EVs ²	Program E2	India	Differential Assembly	FY20	2022
13 European Tier 1 Supplier for PVs and EVs - supplying to Chinese OEM of EVs ³	Program I*	China	Differential Assembly	FY21	TBD ⁴
14 Indian OEM of Electric 2Ws- Motorcycles ³	Program J	India	PMSM Motor and Controller	FY21	TBD ⁴
15 Global OEM of EVs ²	Program B4	North America	Differential Assembly	FY21	2021

Source: COMPANY, JM Financial; # SOP means Start of production. * Proto order received, final order to be received; ** Customer location is based on the location of the OEM to whom products are supplied for end-use; 1. Active and in serial production, 2. Serial production to commence; 3. Prototype supplied, serial production to commence; 4. To be decided