Twitter Thread by 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	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[3]	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