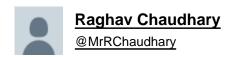
Twitter Thread by Raghav Chaudhary





#IEX INDIAN ENERGY EXCHANGE - CONCALL SNIPPET!

#Q1FY22ConcallSnapshotWithTl	GER
INDIAN ENERGY EXCHANGE	@MrRChaudhary
Highest ever volumes of 1726 MU in June 2021. Volumes traded in last yea	r are now being traded in 1 month
Lockdowns in states but it seems NO LOCKDOW	N AT IEX
Nepal 1st country to commence Cross-Border Electriity Trade. Bhutan 8	k Bangladesh in line, very soon
Gujarat, Maharashtra, Tamil Nadu, Telangana key growth drivers due t	o rising industrial operations
Power Capacity grew at 3.5%YOY whereas Renewables capacity at 10.4% (cheers to decarbonised economy)
DAM - Integrated market as DISCOMs now prefer price discovery through tran power procurement in comparison to GTAM m	
RTM - To meet real time distribution of power and proper functioning of dem replace DSMs still DSM volumes are down	
AIM - Govt Collaborations and Cross-border trade to facilitate power moveme join the exchange platforn	ent and enable South Asian region to
High Demand - PPAs demand is being met and further also will be met by infrastructure, low quantum traded and expensive	
Also, cross-border transactions for power also an opportunity to ease the mov country with excess supply to the one with defic	
Target - Cross-border market volumes may reach 8-10 billion u	ınits in next 4-5 years
Performance - New products launched last year have done	significantly good
RTM units traded lasy year were 12bn whereas 1.5bn every	month at present
GTAM units of 2-3mn/per day in last year are now 15mr	units/per day
Talks on developing emission related tradings products like i	n Europeon Markets
IGX - Volumes not the focus for now but to develop a proper sys	syem and framework is
Key growth drivers for IGX - Bringing gas under GST, Rationalization of Infrastructure development, development of a systematic of	
Reforms under The Electricity (Amendment) Bill, 2021 will open up more volu	mes and competition from DISCOMS
Management Commentary - "Scope and Opportunity in the power/end	ergy sector is VERY LARGE"

When asked about the shift towards renewable energy, management replied "EVERY CHANGE IS AN OPPORTUNITY FOR US".

The management is very honest and optimistic for the Indian Power Sector