

Pick of the Week

BUY – Aegis Logistics (AEGIS)

CMP: ₹672 as on 1st September 2025

Fair Value (FV): ₹865

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Time Period: 12 months

Why Invest?

- Kandla continues to register strong growth in volumes & Haldia volumes normalized.
- LPG division volumes were strong during Q1FY26.
- The Company's strategy is to build, own, and operate India's leading network.
- We estimate the liquid division of Aegis to remain strong over FY25-27E.
- Aegis Vopak Terminals Ltd (AVTL) has started contributing meaningfully.
- We expect earnings to grow by 17.4% in FY26E & grow by 16.2% in FY27E.

Maintain BUY with

FV Rs-865

Read Full Report

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