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Aditya Birla Capital set for steady growth amid strategic shifts

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Aditya Birla Capital (ABCAP) is positioned for continued growth, driven by strategic investments, digital transformation, and synergies within its ecosystem, according to analysts from Motilal Oswal Financial Services and BofA Securities.

The company's diversified approach across its non-banking financial company (NBFC), housing finance, asset management, life insurance, and health insurance segments places it on a strong growth trajectory, with expectations of healthy returns in the upcoming quarters.

The company's loan book has seen steady growth, increasing 4% quarter-on-quarter (QoQ) to INR 1.19 lakh crore in 3QFY25. ABCAP is placing a greater emphasis on secured loans, with a focus on the SME segment, which is expected to support its medium-term goal of achieving 25% growth in assets under management (AUM). However, net interest margins (NIMs) contracted by 24bps QoQ, driven by a greater mix of secured loans. Analysts anticipate that NIMs will stabilize and gradually improve in the coming quarters.

Analysts are optimistic about the potential merger of Aditya Birla Finance (ABFL) with Aditya Birla Capital, expected to be completed by March 2025, which could unlock synergies and enhance operational efficiency across businesses.

Investors are encouraged by the company's strategy to leverage its ecosystem for profitable growth, with expectations that ABCAP will remain a key player across its business verticals, with significant upside in AUM and improved return ratios in the medium term.

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AB Capital Consolidated December 2024 Net Sales at Rs 9,381.35 crore, up 6.61% Y-o-Y

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Reported Consolidated quarterly numbers for Aditya Birla Capital are:

Net Sales at Rs 9,381.35 crore in December 2024 up 6.61% from Rs. 8,800.06 crore in December 2023.

Quarterly Net Profit at Rs. 708.00 crore in December 2024 down 3.77% from Rs. 735.76 crore in December 2023.

EBITDA stands at Rs. 3,527.48 crore in December 2024 up 15.6% from Rs. 3,051.35 crore in December 2023.

AB Capital EPS has decreased to Rs. 2.72 in December 2024 from Rs. 2.83 in December 2023.