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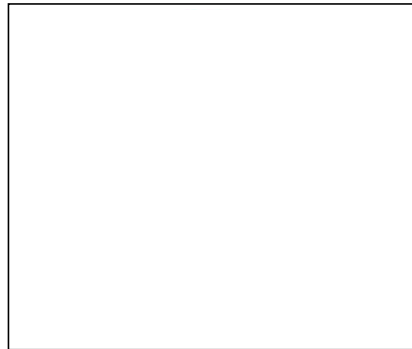
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TERMS AND CONDITIONS

Vedanta Demerger — Here's what is in store for nearly 21 lakh retail shareholders

Vedanta has the largest aluminium capacity in India which is more than 2.5 MT and is headed towards 3 MT. Therefore, the company gains on the volumes front but what also helps is that they have focused on backward integration, with their alumina capacity moving to 5 MT while captive coal is also expected to ramp up drastically.

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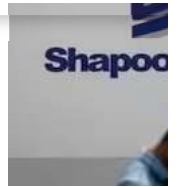


By Nigel D'Souza

April 21, 2026, 11:49:47 AM IST (Updated)

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Vedanta Ltd. has been in a sweet spot in the backdrop of the global commodity melt up over the last few months, and last evening the company's board approved May 1, 2026 as the record date for the demerger which means the last day to buy the stock to be eligible for Demerged entities is April 29, 2026.

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This means that if you have one share of [Vedanta Ltd.](#) on the record date, you will receive one share of their aluminium, power, oil and gas as well as iron and steel businesses.

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As per the company's shareholding pattern for the quarter that ended in March, Vedanta had over 20.5 lakh retail shareholders, or those with authorized share capital of up to ₹2 lakh.

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The rationale for the demerger is it simplifies Vedanta's corporate structure and investors can invest in their preferred vertical.

It also gives the management flexibility to unlock value for investors and they can liquidate a particular asset or bring in a strategic investor if the need arises. Additionally, the management has mentioned that the demerger is more tax efficient.

Five companies of the Vedanta Group will now be listed on the bourses within four to eight weeks, depending on the approval timelines.

Globally, Aluminium has been in a sweet spot and Vedanta is well placed as they benefit from Strong LME prices, capacity expansion and backward integration.

Vedanta has the largest aluminium capacity in India which is more than 2.5 MT and is headed towards 3 MT. Therefore, the company gains on the volumes front but what also helps is that they have focused on backward integration, with their alumina capacity moving to 5 MT while captive coal is also expected to ramp up drastically.

The conglomerate's costs of production for the Aluminium business has declined by 37% over the last 14 quarters and is

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Chg: 119.00

ADANI PORTS
Chg: 57.80

JSWSTEEL
Chg: 34.90

TECHM
Chg: 34.80

NTPC
Chg: 9.95

Commodities

Gold
Chg: -198.00

Silver
Chg: -736.00

Crudeoil
Chg: 231.00

Naturalgas
Chg: -0.10

Aluminium
Chg: 3.25

Currency

Dollar-Rupee
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expected to decline further towards \$1,550 - \$1,600 per tonne. The management believes that this will help their aluminium vertical EBITDA to double to \$4 billion from \$2 billion in financial year 2025.

Nuvama has been bullish on the stock and a majority of its ₹899 price target stems from the aluminium business followed by [Vedanta Ltd.](#), which derives bulk of its value from the 60% stake in Hindustan zinc.

Finally a concern over the past few years have been the health of the promoter entity Vedanta resources who at one point of time had total debt of \$9.5 billion, including inter company loans. But over the past few years, that fears has receded as this debt has come down by half.

Most of the analysts who have coverage on Vedanta, continue to have a "buy" rating on the stock.

Shares of Vedanta are currently at the lows of the day, currently trading 0.5% lower at ₹767.4.

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