FundaIQ Analysis Report

Aarti Drugs Limited (AARTIDRUGS.NS)

Generated on August 20, 2025 at 09:38 PM

Company Information

Company Name	Aarti Drugs Limited
Ticker Symbol	AARTIDRUGS.NS
Sector	Healthcare
Industry	Drug Manufacturers - Specialty & Generic

Aarti Drugs Limited, through its subsidiaries, manufactures and markets active pharmaceutical ingredients (APIs), pharmaceutical intermediates, specialty chemicals, and formulations in India and internationally. The company offers aceclofenac, celecoxib, diclofenac sodium, diclodenac potassium, diclofenac diethylamine, diclofenac resinate, diclofenac epolamine, nimesulide, ciprofloxacin HCL, enrofloxacin base, gatifloxacin sesquihydrate, levofloxacin base, moxifloxacin, norfloxacin, ofloxacin, metronidazole benzoate, ornidazole, secnidazole, tinidazole, clopidogrel bisulphate, ticlopidine HCL, metformin HCL, pioglitazone HCL, teneligliptin, vildagliptin, fluconazole, ketoconazole, tolnaftate, zolpidem tartrate, niacin, raloxifene HCL, and acamprosate. It also provides benzene sulphonyl chloride, benzene sulphonic acid, benzene sulphonic acid methyl ester, sodium benzene sulfinate, para toluene sulphonyl chloride, methyl para toluenesulfonate, sodium para toluenesulfinate, para chlorobenzenesulfonyl chloride, formamide, calcium fluoride, potasium formate, benzenesulfonamide, ethyl p- toluenesulfonate, N,N',N'-tris-(4-toluene sulfonyl)-diethylenetriamine, ortho para toluene sulfonamides, ortho para toluene sulfonamides acid methyl ester, para chlorobenznesulfonamide, para toluenesulfonyl hydrazide, para toluenesulfonamide, and sodium benzenesulfonate. In addition, it offers pharma intermediate products, which includes Celecoxib, Ciprofloxacin, Clopidogrel, Diclofenac, Ketoconazole, Nimesulide, Raloxifene, Tinidazole, and Zolpidem. Further, the company develops drugs for the antioxidant, antifungal, cardiovascular, and antidiabetic therapeutic areas. The company was incorporated in 1984 and is headquartered in Mumbai, India.

Executive Summary

Current Price	■478
Market Cap	■43,627,061,248
Sector	Healthcare
Industry	Drug Manufacturers - Specialty & Generic

Valuation Summary

DCF Fair Value	■437.24

DCF Upside/Downside	-8.5%
EPS Target Price	■580.93
Projected P/E	20.0x
Terminal Value	■255 Cr

Valuation Assumptions

DCF Model Assumptions

Base Revenue (Cr)	■2,387.03
Growth Rate (Year 1-3)	15.0%
Growth Rate (Year 4-5)	10.0%
Terminal Growth Rate	2.0%
Tax Rate	17.6%

EPS Model Assumptions

EBIT Margin	10.4%
Interest Expense %	14.5%
Shares Outstanding (Cr)	9.13

Detailed Valuation Results

Financial Health Overview

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