NRB Bearings Limited (NRBBEARING)

NSE · Consumer Cyclical · Auto Parts

ADVISORY SIGNAL
BUY

Advisory baseline BUY · Technical snapshot HOLD

PRICE NOW	SIGNAL PRICE	VS ADVISED	MARKET CAP	P/E	ROE	SALES GROWTH	EARNINGS GROWTH
Rs.509.45	Rs.457.00	19.3%	Rs.4,938 Cr	33.5x	N/A	19.2%	14.8%

EMA TREND MAP

21D short-term · 50D intermediate · 200D primary trend

21D -1.8% | 50D +3.2% | 200D +30.3%



INVESTMENT CASE

NRB Bearings Limited (NSE: NRBBEARING) screens as a quality-at-a-price / momentum-supported industrial auto-parts name, but the evidence supplied is incomplete for a full institutional conviction call. What is sourced Latest live reference price: INR 509.45 captured 2026-10-14 09:31:06 IST. Signal event: BUY -> BUY at INR 457.00 on 2026-10-14 08:31:24 IST. Fundamentals snapshot: P/E 33.49x, P/B 5.13x, debt/equity 15.653, revenue growth 19.2%, earnings growth 14.8%, gross margin 59.27%, operating margin 12.26%, profit…

BUSINESS / MOAT

Sourced business model NRB Bearings manufactures, markets, and trades bearing products in India and internationally. Product set includes: drawn cup needle bearings, cylindrical roller bearings, full-complement needle…

Moat view: Possible moat evidence from supplied facts Long operating history: incorporated in 1965. Specialized product mix across multiple bearing types and engineered components. Mobility applications suggest technical qualification…

CATALYSTS / RED FLAGS

Catalysts: Revenue growth 19.2% and earnings growth 14.8%. Gross margin 59.27% and operating margin 12.26%. Price remains above EMA 50 and EMA 200. Long…

Red flags: Latest reference price INR 509.45 Captured at 2026-10-14 09:31:06 IST Source: Live This is separate from the historical signal-event price…

DECISION CHECKLIST

WATCH **SIGNAL ALIGNMENT**
Advisory BUY; technical engine HOLD.

PASS **PRIMARY TREND**
Price and EMA structure are aligned.

WATCH **VOLUME SUPPORT**
Volume confirmation is absent or unavailable.

WATCH **WEEKLY MOMENTUM**
Weekly advance is absent or unavailable.

PASS **GROWTH**
Sales 19.2%; earnings 14.8%.

UNKNOWN **MARGIN TREND**
Operating margin 12.3%; change N/A.

UNKNOWN **ROCE / QUALITY**
ROCE N/A; change N/A.

PASS **BALANCE SHEET**
Debt/equity 0.16x.

WATCH **VALUATION**
P/E 33.5x; compare with growth and peers.

REVIEW **MOAT EVIDENCE**
Possible moat evidence from supplied facts Long operating history: incorporated in 1965. Specialized…

REVIEW **SECTOR / PEERS**
Sector / industry Sector: Consumer Cyclical Industry: Auto Parts Peer snapshot supplied NRB Bearings…

REVIEW **EVIDENCE QUALITY**
Evidence quality Strongest evidence: live price snapshot, technical levels, valuation snapshot, peer…

RISK / RETURN PLAN

RISK GRADE	Moderate
LATEST PRICE	Rs.509.45
THESIS BREAK	Rs.384.30
DOWNSIDE TO BREAK	-24.6%
MINIMUM REWARD / RISK	2.0:1
2:1 REWARD HURDLE	Rs.759.75

EXPOSURE GUIDANCE

2-4% maximum portfolio exposure

MONITORING HORIZON

Until the next signal or thesis review; monitor at least weekly

PRICE SNAPSHOT

Captured 2026-10-14 09:31:06.77 IST via Live.

The reward hurdle is a minimum 2:1 planning threshold based on the available stop-loss. It is not a forecast or price target.

SOURCES: Screener.in, Yahoo Finance fundamentals snapshot, Company website, TradingView

This research is AI-assisted and informational only; it is not investment advice. Verify primary filings and current market data before acting.

14 Oct 2026 09:31 IST

NRB Bearings Limited (NRBBEARING) · BUY view

MACHINE FRAMEWORK

M — MEGA TAILWINDS & TRENDS

WATCH - The supplied inputs show the company in Auto Parts with 19.2% revenue growth, and headlines reference growth verticals and aerospace push, but these are unverified…

A — PRICE ACTION & VOLUME

WATCH - Price is above the 50d EMA and 200d EMA but below the 21d EMA, with no volume support, weekly not advancing, and not a breakout.

C — COMPETITIVE ADVANTAGE - MOAT

UNKNOWN - The inputs provide a long product list and a 1965 incorporation date, but no direct evidence of durable moat characteristics.

H — HIGH ROCE - EMERGING & QUALITY

UNKNOWN - ROCE is not available in the supplied inputs, so high-ROCE assessment cannot be made.

I — IMPROVEMENTS IN COMPANY

UNKNOWN - Revenue and earnings growth are supplied, but no direct evidence of margin improvement or operational turnaround is available; margin-change fields are null.

N — COMPANY GETTING INTO MORE THINGS

UNKNOWN - Headlines mention acquisitions and new growth verticals, but the framework requires direct business or financial evidence, which is not supplied.

E — EXECUTION / EARNINGS TRIGGERS

WATCH - Revenue growth 19.2% and earnings growth 14.8% are positive, but margin-change data is missing and the technical decision remains HOLD.

FUNDAMENTAL SCORECARD

PASS	SALES GROWTH	19.2%
PASS	EARNINGS GROWTH	14.8%
WATCH	GROSS MARGIN	59.3%
WATCH	OPERATING MARGIN	12.3%
UNKNOWN	MARGIN CHANGE	N/A
UNKNOWN	ROCE	N/A
UNKNOWN	RETURN ON EQUITY	N/A
PASS	DEBT / EQUITY	0.16x
WATCH	P / E	33.5x

4-YEAR FINANCIAL TREND

METRIC	-	-	-	-
REVENUE	N/A	N/A	N/A	N/A
SALES GROWTH	N/A	N/A	N/A	N/A
OP MARGIN	N/A	N/A	N/A	N/A
NET MARGIN	N/A	N/A	N/A	N/A
EARNINGS GROWTH	N/A	N/A	N/A	N/A
ROCE	N/A	N/A	N/A	N/A
DEBT / EQUITY	N/A	N/A	N/A	N/A

VALUATION / EXPECTATIONS

Sourced valuation P/E: 33.49x P/B: 5.13x Interpretation On the supplied snapshot, valuation appears premium, especially given the absence of verified ROCE and the high debt/equity ratio. The stock is not obviously cheap relative to the peer set, though peer…

SCENARIOS & DELIVERY

BULL

Growth remains strong, margins hold, and the company successfully expands into adjacent verticals. Technicals improve with a reclaim of the 21d EMA and stronger weekly trend…

BASE

The company continues to grow at a moderate pace with stable margins. The stock remains range-bound while investors wait for confirmation of execution. Valuation stays elevated…

BEAR

Growth slows, margins compress, and leverage becomes a larger issue. The stock fails to regain short-term trend support. Headline-driven expansion proves less meaningful than…

MANAGEMENT DELIVERY AUDIT

No usable annual-report excerpts were supplied. Therefore, management commitments cannot be audited against later annual reports. Claim | Later evidence | Status | Not available in supplied evidence | Not available in supplied evidence | NOT YET VERIFIABLE Note Fewer than two usable annual reports…

CATALYSTS / RISKS

Catalysts: Revenue growth 19.2% and earnings growth 14.8%. Gross margin 59.27% and operating margin 12.26%. Price remains above EMA 50 and EMA 200…

Risks: Debt/equity 15.653 is a major concern. Price is below EMA 21. No breakout, no volume support, weekly not advancing. Valuation is not cheap…

THESIS BREAK / MONITOR

Price falls below the supplied thesis break level of INR 384.30. Evidence emerges that growth is decelerating materially. Margins compress without offsetting strategic benefits. Balance-sheet risk worsens. Reported strategic…

EVIDENCE QUALITY & DATA GAPS

Evidence quality Strongest evidence: live price snapshot, technical levels, valuation snapshot, peer snapshot. Weakest evidence: no annual-report excerpts, no financial history, no ROCE/ROA, no management commentary auditability. Key data gaps No financial_history. No annual_report_evidence. No verified management commitments or later-report follow-up. No ROCE. No ROA. No revenue, earnings, or margin history. No customer…

SOURCE LINKS

Screener.in · screener.in

Yahoo Finance fundamentals… · finance.yahoo.com

Company website · nrbbearings.com

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