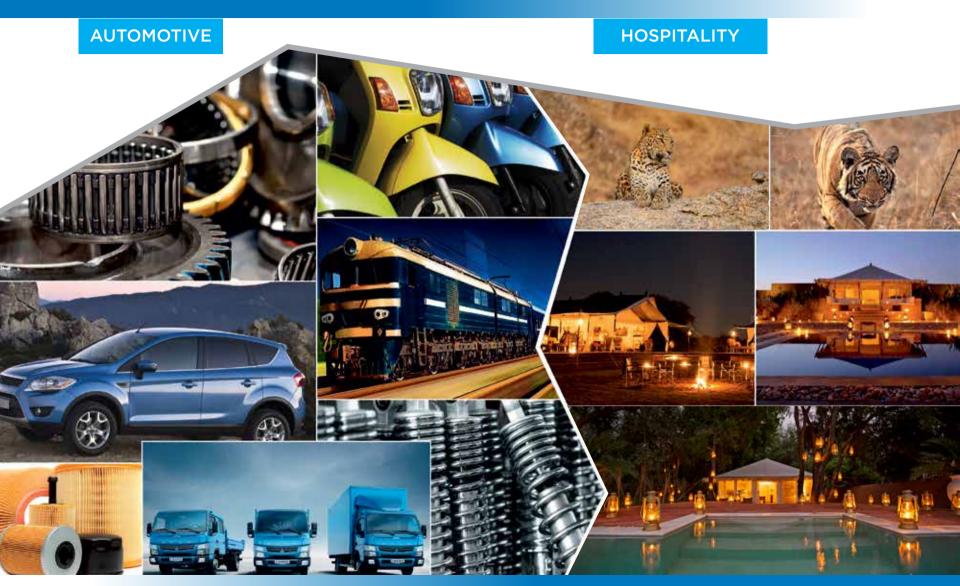


LEADING PLAYER ACROSS TWO VERTICALS





FACTS AT A GLANCE





SIX DECADES OF BUILDING TRUST



1961

Gabriel India

1962

VGIL¹/ PCIL²

1966

Purolator³

1992/1993

Chang Yun IndiaDana/Spicer

1961 - 1994

1976 SNS Foundation, the CSR arm 1995/1997

· Ansysco

HenkelFaurecia

· Behr (now MAHLE)

· Mando (Brakes)

· Valeo Friction

1998 Haldex

2005

MAHLE Filter

2008/2010 · Chang Yun Myutec

Mando (Suspension)

· Anchemco

2012

2006

2007 Takata⁴

Valeo Service

2013

Mando (Steering)

2019

Joyson Safety Systems

2007

Diversification into luxury hospitality

SUJÁN Sher Bagh

2009

SUJÁN The Serai

2013

SUJÁN JAWAI

2006 - 2019

OTHER MILESTONES

GROUP

COMPANIES

dation,

2003 ANAND Supervisory Board

1995 - 2005

2019

ANAND Group companies are recognised amongst 100 Best Companies in India. Also, featured in Best Workplaces for Women by Great Place to Work®

LEADING THROUGH STRONG GOVERNANCE



Deep C Anand Foundation



Deep C. Anand Chairman & Chief Mentor. DCA Foundation



Kiran D Anand Trustee





Trustee



Trustee

Trustee



Trustee



Trustee



Aditya Narayan Lorenzo Piaget Rohit Arora



Deepak Chopra

Trustee

ANAND Supervisory Board



Member OC & PC

Aniali Singh Chairperson, ASB Executive Chairperson, ANAND & Gabriel



Jaisal Singh Chief Executive. SUJÁN Member PC & FARC



Aditya Narayan Ex-President & CEO. **BHP Billiton India** Member OC & PC



Lorenzo Piaget



Partner. Piaget & Associés Member FARC



Teipreet Chopra

President & CEO. **Bharat Light Power** Member PC & FARC Member OC & FARC

ANAND Executive Committee



Deepak Chopra Chairman, AEC Group Chief Executive Officer, ANAND Head Business Group I



Sunil Kaul **Group President** Excellence in Manufacturing & Services, Innovation & Technology Head Business Group II



Mahendra K Goyal **Group President** Aftermarket Head Business Group III



Manoi Kolhatkar Group President **Business Development and** Corporate Materials

Head Business Group IV



Jagdish Kumar **Group President** Group Chief Financial Officer, IT and Corporate Strategy & Planning Head Business Group V

Rohit Arora

Founder & Chairman.

Silverskills

DIRECTING THE FUTURE STRATEGICALLY



Vision

To Create Value Sustainably Through Pursuit of Excellence and Good Governance

















Strategic goal is to achieve revenue of 2.5 Billion US Dollars by 2022

ANAND BELIEFS & BUSINESS PHILOSPHY

PARTNERSHIPS

QUALITY





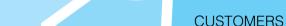
- Enhance fairness and transparency
- Strengthen CSR activities under SNS Foundation
- Ensure robust strategic planning and execution
- Strengthen governance through ANAND Supervisory Board
- Build and sustain strategic partnerships
- Exchange best-in-class management practices between partners
- Strengthen "Unified corporate entity"
- Foster a culture of quality
- Deploy world-class quality standards, tools and systems

Be top 3 player in each seament **CORPORATE** CITIZENSHIP &

PEOPLE

GROWTH

- Aim to grow ahead of the market
 - Live by "Business is 90% people"
 - Attract and retain talent
 - Empower people and encourage accountability
 - Develop people for required skills and experience



MANUFACTUR-ING & **TECHNOLOGY**

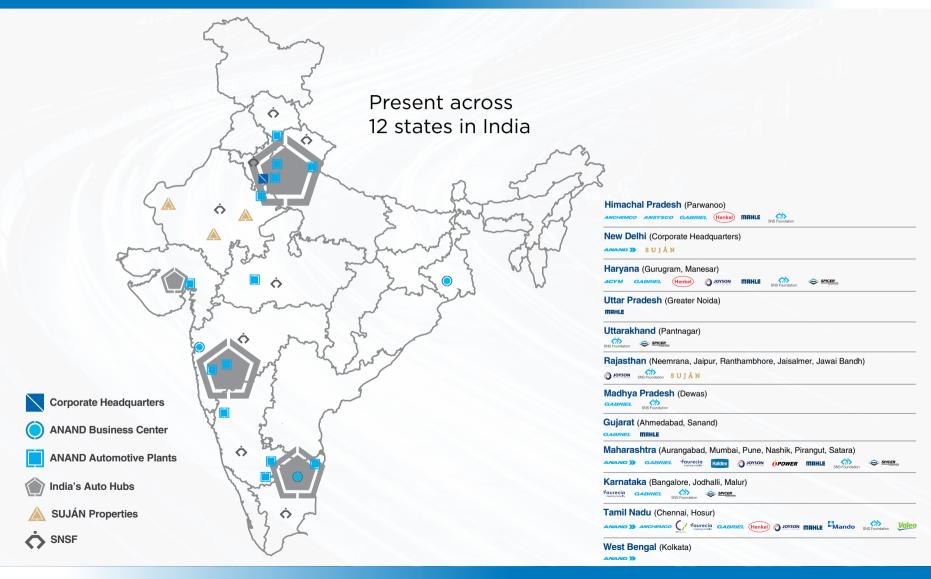
GOVERNANCE

- Become the preferred supplier of our customers Provide value and exceed
- customer expectations
- Nurture strong and enduring customer relationships

- Achieve operational excellence through lean production systems
- Develop supplier base through VSME* programme
- Aim to spend 2% of sales in R&D
- Develop innovative processes and products to stay competitive

BEING CLOSE TO CUSTOMERS





PARTNERSHIP BASED MODEL





CY Myutec, Korea Dana Incorporated, USA Elewana Collection, Kenya Faurecia Clean Mobility, France Haldex AB, Sweden Henkel KGaA, Germany Joyson Safety Systems, USA/China MAHLE GmbH, Germany Mando Corporation, Korea Valeo, France

TECHNICAL COLLABORATIONS

Bluetech Holdings Ltd., Hong Kong KONI BV, The Netherlands KYB Corporation, Japan LIQUI MOLY GmbH, Germany Seiken Chemical Industry Company, Japan Sunrise MSI Corporation, Japan Yamaha Motor Hydraulic Systems, Japan

AUTOMOTIVE PARTNERING WITH GLOBAL LEADERS



JV PARTNERS	HEADQUARTERS	REVENUE*	EMPLOYEES*	BUSINESSES
CY Myutec	Korea	KRW 108 Billion	301	Synchronizer rings for transmissions
Dana	USA	\$ 8.1 Billion	114693	Driveline, Sealing and Thermal-management technologies
Faurecia	France	Eur 17.5 Billion	2,309	Seating, Interior systems and Emissions control
Haldex	Sweden	SEK 5.1 Billion	53,000	Brake and suspension systems for commercial and off-highway vehicles
Henkel	Germany	Eur 19.9 Billion	59,250	Adhesive Technologies, Laundry & Home Care and Beauty Care
Ningbo Joyson	China	CNY 56.2 Billion	79,564	Automotive safety, Automotive electronics and telematics, Automotive functional components
MAHLE	Germany	Eur 12.6 Billion	11,939	Engine systems, filtration, electrics/mechatronics and thermal management
Mando	Korea	KRW 5665 Billion	113,600	Brakes, suspension and steering. Halla Group: Logistics, transportation, construction, heavy industry etc
Valeo	France	Eur 19.1 Billion	113600	Comfort and Driving Assistance Systems (interior controls and electronics, driving assistance), Powertrain Systems (electrical, electronic, transmission and engine system), Thermal Systems, Visibility Systems

AUTOMOTIVE CUSTOMER PRESENCE



50+ OEM Customers across Two Wheelers, Three Wheelers, Passenger Cars, Commercial Vehicles Railway Segments and Engine Components



















































































ŠKODA































Safety



MOSAOF 🖳

JOYSON ANAND ABHISHEK SAFETY SYSTEMS (JAAI)

JV: JOYSON SAFETY SYSTEMS, USA

SEAT BELTS. **AIRBAGS**

& STEERING WHEELS



HENKEL ANAND INDIA

JV: HENKEL KGaA, GERMANY TC: SUNRISE MSI CORPORATION. JAPAN

SEALANTS, ADHESIVES, **COATINGS & NVH PRODUCTS**



GABRIEL INDIA

TC: KYB CORPORATION, JAPAN: YAMAHA MOTOR HYDRAULIC SYSTEMS, JAPAN; KONI BV, THE **NETHERLANDS**

SHOCK ABSORBERS. STRUTS, FRONT FORKS, GAS SPRINGS, **COOLANTS & BUSHKITS**



HALDEX INDIA

JV: HALDEX, SWEDEN

SELF-SETTING AUTOMATIC BRAKE ADJUSTERS, MANUAL SLACK ADJUSTERS, CONDENSOR-CUM-SEPARATOR, ABS & OTHER AIR BRAKE PRODUCTS



MANDO AUTOMOTIVE INDIA

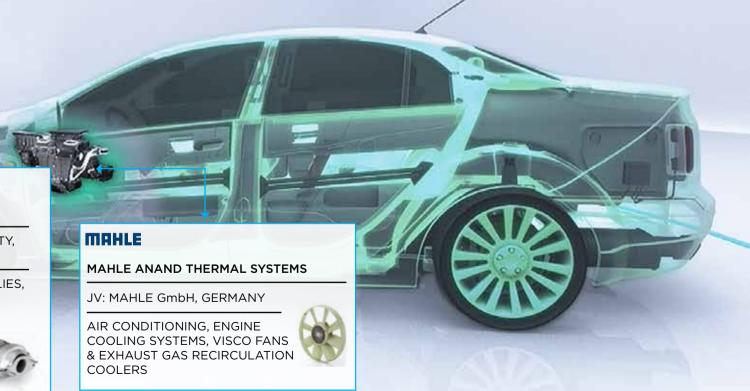
JV: MANDO CORPORATION, KOREA

HYDRAULIC BRAKES, **ELECTRIC POWER** STEERING SYSTEMS, SHOCK ABSORBERS and STRUTS





- Emission Control
- Thermal Management



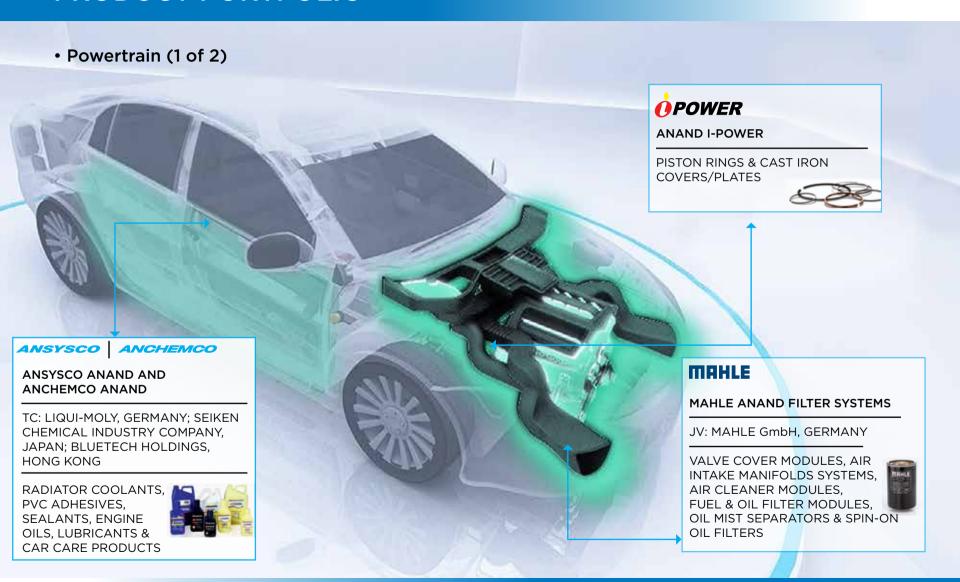
faurecia

FAURECIA CLEAN MOBILITY

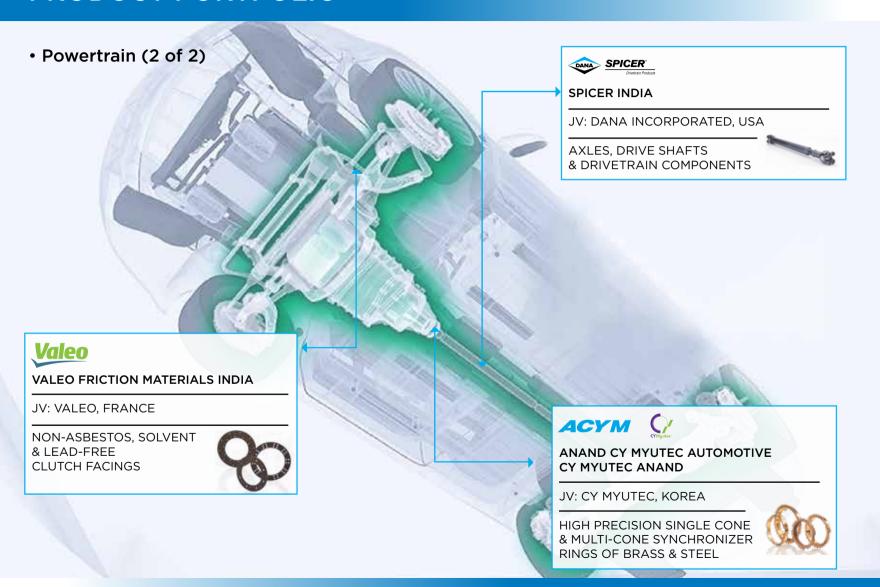
JV: FAURECIA CLEAN MOBILITY, FRANCE

EXHAUST MUFFLER ASSEMBLIES, CATALYTIC CONVERTERS, INSTRUMENT PANEL REINFORCEMENT ASSEMBLIES (IPRT) & DOOR SIDE IMPACT BEAMS (SIB)









AUTOMOTIVE GABRIEL, THE FLAGSHIP COMPANY



- Established in 1961, it is a publicly listed company
- Total revenue of INR 20,764.63 Million (US\$ 294.54 Million) & Profit Before Tax of 6.9% at INR 1430.53 Million (US\$20.3 Million) during 2018-19*
- Market leader for pioneering Ride Control Products in India
- 7 manufacturing plants and 3 satellite facilities with products ranging from Shock Absorbers, Struts, Front Forks, Seat Dampers, Cabin Dampers
- Amongst the Top 10 suspension players globally
- Strong R&D with over 75 patents filed till date in products and processes
- Recognised by Great Place to Work® for 5th year in a row. Ranked 90th amongst 'India's Best Companies To Work For 2019'. Featured in Top 75 Best Workplaces for Women











SUJÁN CAMPS AND PALACES PROPERTIES & EXPERIENCES



TRANSFORMATIVE AND EXPERIENTIAL TRAVEL

SUJÁN

















SUJÁN GLOBAL RECOGNITIONS



SUJÁN has established itself on the global high-end luxury tourism scene and has won prestigious accolades.











ACCOLADES

- Runner-up, Favourite Safari Lodge & Favourite Boutique Hotel in India by Condé Nast Traveller Readers' Travel Awards 2019
- Travel + Leisure India & South Asia India's Best Awards, 2018
- The Gold List Condé Nast Traveler, 2018
- The Gold List Condé Nast Traveler, 2017
- Top 100 Hotels in the World Tatler, 2016
- Andrew Harper Annual Grand Awards, 2016
- The Gold List Condé Nast Traveler, UK & USA, 2016
- The Hot list Condé Nast Traveller, UK & USA, 2015

ANAND GROUP CORPORATE





BUSINESS DEVELOPMENT



OPERATIONS, EXCELLENCE IN MANUFACTURING & SERVICES, CORPORATE MATERIALS



CORPORATE COMMUNICATIONS



AFTERMARKET



TECHNOLOGY & INNOVATION



CORPORATE SOCIAL RESPONSIBILITY



HUMAN RESOURCE



INTERNAL AUDIT, CORPORATE FINANCE, TAX & LEGAL



MANAGEMENT & GOVERNANCE

BUSINESS DEVELOPMENT



Customer Relationships

- Leveraging automotive industry network built across five decades
- Holding Customer Technology Days
- Conducting customer satisfaction surveys

Business Intelligence

- Market intelligence & analysis Market, Regulatory, Customers, Competitors
- Identifying new business opportunities

>> Voice in the Industry

- Membership and representation in industry associations (ACMA, CII, FICCI, etc.)*
- Visibility in industry publications and presence in trade shows and exhibitions





















BUSINESS DEVELOPMENT CONNECTING WITH KEY CUSTOMERS



Technology Days and Auto Expo are an integral part of customer connect and branding for ANAND Group companies.















Maruti Suzuki Tech Day 2017 Daimler Tech Day 2016

BUSINESS DEVELOPMENT STRONG RELATIONSHIPS



Mrs. Anjali Singh Executive Chairperson, ANAND Executive Chairperson, Gabriel India

- Member, CII International Council
- Executive Committee Member, ACMA
- Co-Chairperson, Pillar 4 Strategic Partnerships, ACMA
- Executive Committee Member, Maruti Suzuki Supplier Welfare Association
- Member, Tata Motors Vendor Council
- Member, India-Japan Business Leaders' Forum

Mr. Deepak Chopra Group CEO, ANAND and Member, ANAND Executive Committee

- Chairman, Executive Committee Northern Region, ACMA
- Member, Tata Motors Vendor Council
- Member, Ashok Leyland Strategic Supplier Committee

Mr. Anand Sontakke Member, ANAND Management Committee and COO, MAHLE ANAND Filter Systems

• Executive Committee Member, Honda Cars India Suppliers Club







BUSINESS DEVELOPMENT GARNERING CUSTOMER APPRECIATION











MAHLE ANAND Thermal Systems received Cost Excellence Award at the TATA Motors Annual Supplier Meet





Production' by Yamaha Motor Company at the Global Suppliers Conference

Excellence in 'Theoretical Value





Mando Automotive receives 'Best Vendor in Localisation Award' from Hyundai Motor India

HUMAN RESOURCES NURTURING AND GROOMING OF TALENT



OE Model - Pioneered the "Operating Engineer" Model, which has enabled ANAND locations being manned by educated work force and being union-free

- OE Model Pioneered the "Operating Engineer" Model, which has enabled ANAND locations being union free and also managed by educated workforce
- Developing Leadership from within Most of ANAND's senior management today has grown within the Group
 - At ANAND, every leader is provided with the right platform to exhibit their true capabilities. Potential leaders across levels are groomed through the ANAND Leadership Development Programmes (ALDP) to become effective business leaders
 - Talent management programmes are supported through mandatory mentoring and coaching programmes
- World of Opportunities ANAND people are sent overseas for training to JV partner



locations and renowned universites like Oxford University

- Career Mobility Cross-fertilisation of skills and growth opportunities across ANAND companies and JV Partners
- Hiring Talent We hire talent from premium institutes

HUMAN RESOURCES EMPOWERING A DIVERSE WORKFORCE



Employing women on the shop floor

- ANAND strongly believes in the empowerment of women
- >> We are an equal opportunity employer
- Some locations have up to 95% women on the shop floor
- Accommodation facilities and amenities provided to encourage women to seek employment

Widespread reach and diverse workforce

- With presence in 59 locations across India, ANAND employs talent from diverse backgrounds and geographies
- It is this diversity that supports our basic ethos of inclusive growth, reflected across management levels



HUMAN RESOURCES DEVELOPING RESOURCES THROUGH ANAND U



- 'ANAND U' is the ANAND Corporate University that meets the HR development needs of Group companies
- ANAND U has been contributing towards people development since 1991
- ANAND U offers training support and guidance through three academies
 - Leadership Academy
 - Operational Excellence Academy
 - Development Academy
- It is focused on four major areas of people development: Operational Excellence, Talent Development, Technical Interventions and Development of Operating Engineers
- Training modules
 - Classroom for face to face learning
 - E-learning
 - Engaging with internal and external faculty

"BUSINESS IS 90% PEOPLE"

MR. DEEP C. ANAND



PURSUING EXCELLENCE IN MANUFACTURING AND SERVICES



- Visionary Leaders For Manufacturing (VLFM) VLFM programme was started by CII in partnership with Japan International Co-operation Agency (JICA). Through VLFM, ANAND Senior Managers are given unique leadership perspectives. (Around 100 managers trained in VLFM since 2007)
- Visionary Small And Medium Enterprises (VSME) VSME is a programme under the VLFM umbrella, focused on Tier 1 and Tier 2 suppliers. It aims to achieve a win-win relationship between customers and suppliers and also to improve manufacturing (quality, cost, delivery) of suppliers. (Dedicated teams of ANAND engineers has helped around 500 suppliers since 2009)
- ANAND House of Quality Culture (AHQC) Groupwide initiative to improve quality in all that we do
- **ANAND Heijunka Production System (AHPS)** Moving plants from traditional manufacturing to world class practices
- >> Specialised Training for Operating Engineers (STOE) 15 %
 OEs trained through various technical training programmes to specialize in areas of interest e.g. maintenance
- Safety of all employees is of paramount importance across all Group companies







CORPORATE SOCIAL RESPONSIBILITY HAVING AN IMPACT IN COMMUNITIES NEAR-BY



SNS Foundation (SNSF), the CSR arm of the ANAND Group was founded in April 1976.



EDUCATION

- Engaged with 100+ partner schools (across 13 ANAND locations in eight states)
- Impacted 1.5 lakh school students with inputs of better teaching and infrastructure
- Contributed to the development of sanitation facilities for 34 schools, 210 classrooms and 80 laboratories
- 211 MEDHAVI scholarship awardees in 13 polytechnics (seven states)

SKILL DEVELOPMENT

- 17 NSDC aligned training programmes spanning 10 disciplines/trades
- 14 training centres across 5 ANAND locations
- 35,000+ trained youth (70% females)
- 1000+ employer network
- 70% overall placement success rate
- 600+ individuals developed as entrepreneurs



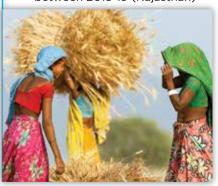


HEALTH & HYGIENE

- Key areas HIV/ AIDS, Reproductive and Child Health and Environment, Health & Safety services
- 7 lakh underserved population reached out to across the three key areas
- 2 decades of partnership with Ministry of Health and Family Welfare (Himachal Pradesh)
- 10+ years of partnership with multiple State AIDS Control Societies
- 2018: Introduced mobile health services for unserved population in four villages of Jawai, Rajasthan

COMMUNITY CONSERVATION

- Key areas microfinance, maintenance of green environs and holistic village development
- Rs. 14 crore micro credit facilitated for 850+ self-help groups
- 3 public parks developed and being regularly maintained (Himachal Pradesh and Haryana);
 52 sq. km of wilderness protected (Rajasthan)
- 19200 individuals benefit from sanitation programme (Rajasthan)
- Healthcare for 90K+ livestock (Rajasthan)
- 55 individual leopards identified between 2013-19 (Rajasthan)



MANAGEMENT & GOVERNANCE PURSUING ORGANISATIONAL TRANSPARENCY



- Ethics Ethics forms a very important component of ANAND Group's belief and its practices. Employees, suppliers and vendors are encouraged and guided to maintain the highest level of ethical practices
 - Group Ethics Committee
 - Anonymous hot line facility through KPMG
- Prevention of Sexual Harassment This is taken very seriously at ANAND. A committee oversees activities related to educating employees and evaluating complaints
- 360 Degree Feedback ANAND is well known for its practice of transparency and formal feedback. It was one of the first companies to establish 360 degree feedback across all levels
- Open Discussions We encourage open discussions and dialogue as the main means to sort out differences and improve functioning



LIVING THE "ANAND WAY"





We Drive ANAND as a UNIFIED CORPORATE ENTITY

We ASPIRE to be a WORLD-CLASS organisation

We ENCOURAGE organisational transparency

We Value INTEGRITY

We Encourage INNOVATION

We Nurture TALENT

We Support continuous EDUCATION

We Build TRUST and EMPOWER PEOPLE

We PRACTICE open and HONEST COMMUNICATION

We RECOGNISE and reward ACHIEVEMENT

We Are an EQUAL opportunity employer

We Are committed to SOCIAL RESPONSIBILITY

