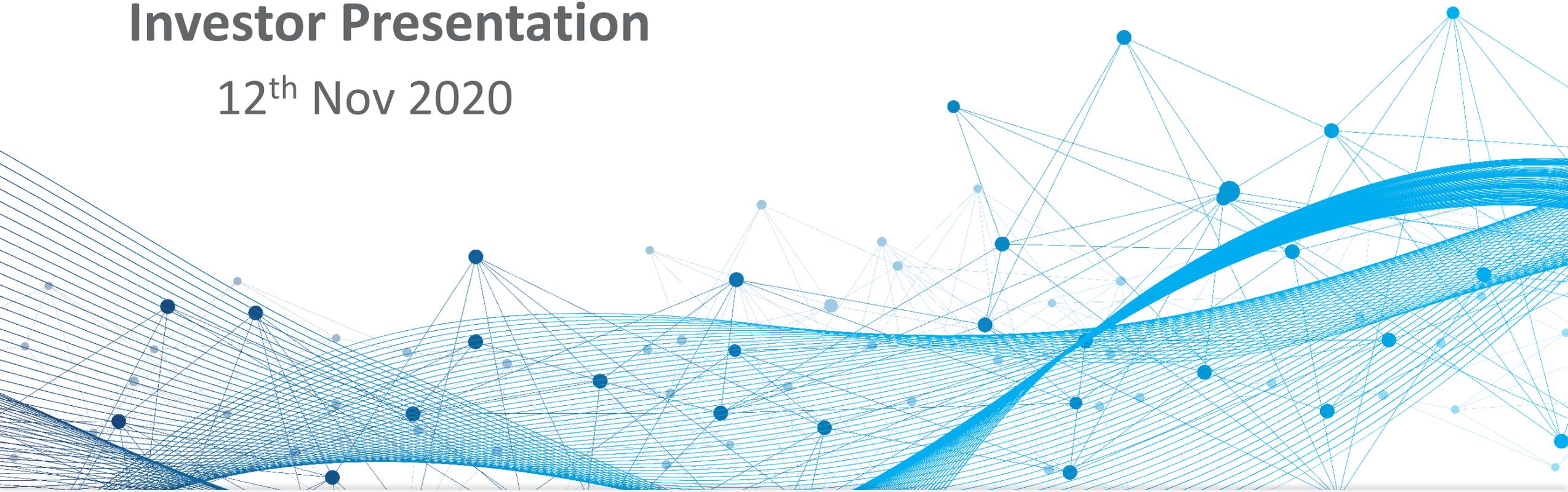


Gabriel India Ltd.

Investor Presentation

12th Nov 2020



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COVID-19: Update

OUR RESPONSE TO COVID

Employee Strength: 2951

Number of Locations: 7

Number of COVID +ve: 10*

*Total 34 employees infected since beginning, 24 recovered

Daily Monitoring of Health Status via Google form
|| 90% response across Gabriel ||

- On time action - reducing the risk of employees getting sick
- Supporting employees & their families reporting sick

Thermal Scanning & Arogya Setu app
|| Twice a day ||

- Thermal screening for **100%** employees twice a day
- Restricting entry at workplace - High Risk in Arogya setu app

COVID Monitoring Officer (CMO) & Plant Crises
Management Team (PCMT)
|| Dedicated role created ||

- CMOs - eliminating various surface touch points, Ensuring employee discipline w.r.t covid guidelines
- PCMT: Rapid action force to support immediately upon need

Disinfection & Sanitization of workplace
|| Disinfection (1 / wk) & Sanitization (1 / 2hrs) ||

- Weekly disinfection - reducing the risk
- Sanitization – reducing the risk through multiple touch points

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Q2 FY21 Result Update

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Business Overview

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Strategy Going Forward

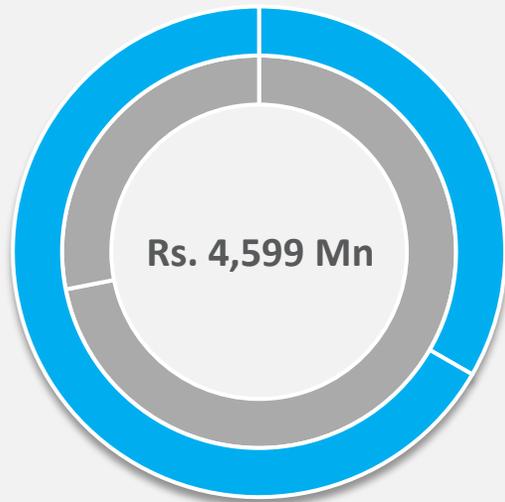


Q2 FY21 Result Update

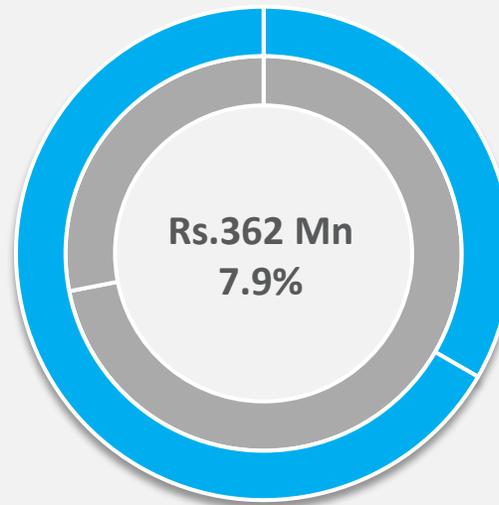
Financial Highlights – Q2 FY21

Q2 FY21

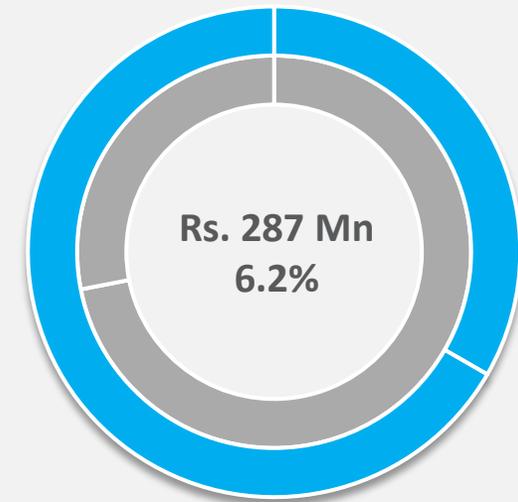
Revenue



EBITDA



PBT



Q1 FY21

Rs 1,229 Mn

Q2 FY20

Rs 4,727 Mn

Q1 FY21

Rs -171 Mn / -13.9%

Q2 FY20

Rs 313 Mn / 6.6%

Q1 FY21

Rs -242 Mn / -19.7%

Q2 FY20

Rs 223 Mn / 4.7%

Financial Highlights – H1 FY21

Revenue

Rs. 5,827 Mn

as compared to Rs. 9,898 Mn in
FY20 (Y-o-Y -41.1%)

EBITDA

Rs. 192 Mn (3.3%)

as compared to Rs. 725 Mn in
FY20 (Y-o-Y -73.6%)

PBT

Rs. 45 Mn (0.8%)

as compared to Rs. 540 Mn
in FY20 (Y-o-Y -91.6%)

Balance Sheet

Net Cash position of Rs. 2,115 Mn

Cash Flow

Cash Flow from operations to the
tune of Rs. 1109 Mn as compared
to Rs. 641 Mn outflow in FY20

Capex

Capex incurred during the quarter
Rs. 211 Mn

Financial Track Record

P&L (Rs. Mn)	Q2 FY21	Q2 FY20	YoY	Q1 FY20	QoQ	FY20	FY19	YoY
Revenue from Operations	4,599	4,727	-2.7%	1,229	274.3%	18,700	20,765	-9.9%
Gross Margin (%)	26.2%	25.1%	1.1%	29.6%	-3.4%	26.8%	27.4%	-0.6%
EBITDA Margin (%)	7.9%	6.6%	1.3%	-13.9%	21.8%	7.4%	8.6%	-1.2%
Net Margin (%)	6.7%	3.9%	2.8%	-19.4%	26.1%	4.5%	4.6%	-0.1%

Balance Sheet (Rs. Mn)	H1 FY21	FY20	FY19
Net worth	6,462	6,518	5,900
Gross Debt	97	78	70
Liquid Investments	2,115	1,326	936
Fixed Assets	3,692	3,662	3,515

Key Performance Indicators	H1 FY21	FY20	FY19
Net Working Capital (days)	28	33	30
ROIC (%)	1.5%	19.8%	29.1%
Cash Flow from Operations	1,109	1,201	928

Q2 FY21 vs Q2 FY20

Improved Margins on account of Cost reduction drives



- Strengthened Net worth
- Maintenance of high liquidity
- Improvement of Working Capital efficiency

Profit & Loss Statement

Particulars (Rs. Mn)	Q2 FY21	Q2 FY20	YoY	Q1 FY20	Q-o-Q	H1 FY21	H1 FY20	Y-o-Y
Revenue from Operations	4,599	4,727	-2.7%	1,229	274.3%	5,827	9,898	-41.1%
Raw Material	3,392	3,538		865		4,257	7,334	
Employee Expenses	364	389		337		702	794	
Other Expenses	480	487		197		677	1,045	
EBITDA	362	313	15.9%	-171	312.1%	192	725	-73.6%
Other Income	42	22		25		67	40	
Interest	13	9		7		20	17	
Depreciation	105	103		89		194	208	
PBT	287	223	28.8%	-242	218.7%	45	540	-91.6%
Tax	-19	38		-4		-23	135	
PAT	306	185	65.5%	-238	228.7%	68	406	-83.2%
EPS	2.13	1.29		-1.66		0.48	2.82	

- The results of H1 are not comparable due to the adverse impact by outbreak of Covid-19
- However, due to stringent cost reduction measures Gabriel has managed to minimise the impact of the Pandemic on its performance

Balance Sheet

ASSETS (Rs. Mn.)	Sep-20	Mar-20	Mar-19
Non-current assets	4,374	4,677	3,970
Current assets	6,347	5,056	5,722
TOTAL ASSETS	10,721	9,733	9,692

EQUITY AND LIABILITIES (Rs. Mn.)	Sep-20	Mar-20	Mar-19
Equity	6,462	6,518	5,900
Non-Current Liabilities	374	335	436
Current liabilities	3,885	2,880	3,356
TOTAL EQUITY AND LIABILITIES	10,721	9,733	9,692

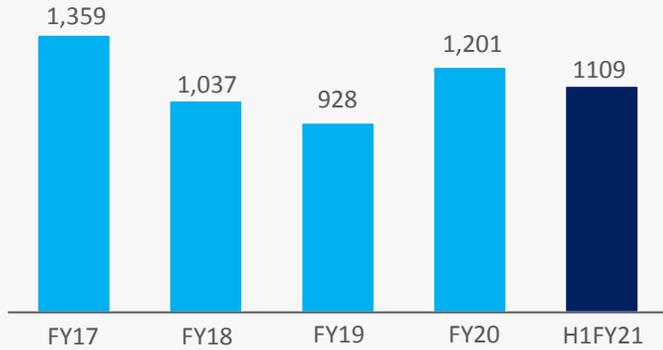
- Net Cash stood at Rs 2115 Mn at the end of Sep'20
- Net Working Capital Days at 28 as compared to 33 last year
- Capex for H1 FY21 to the tune of Rs. 211 Mn

Capex including CWIP for H1 20-21

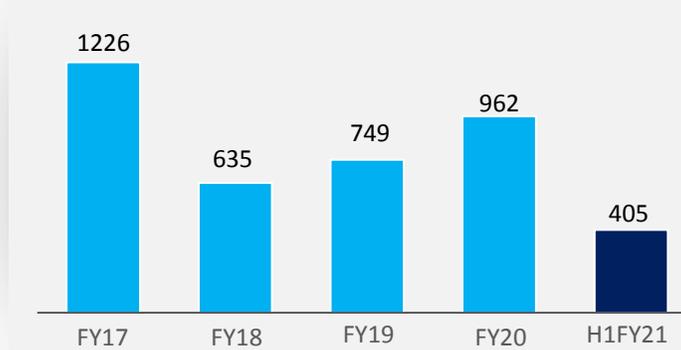
- Dewas Building for D2 & Paint Line
- Tech Centre at Chakan
- Expansion in Chakan, Hosur & Casting Plant

Cash Flows

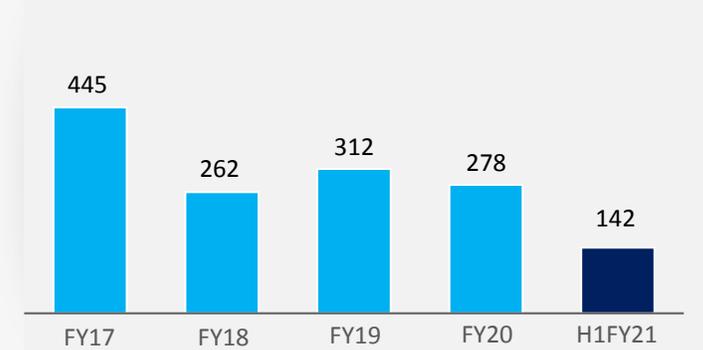
Cash Flow from Operations (Rs. Mn)



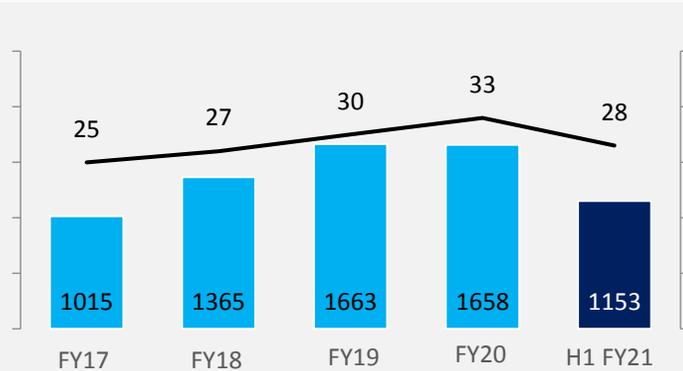
Cash Flow used in Investing (Rs. Mn)



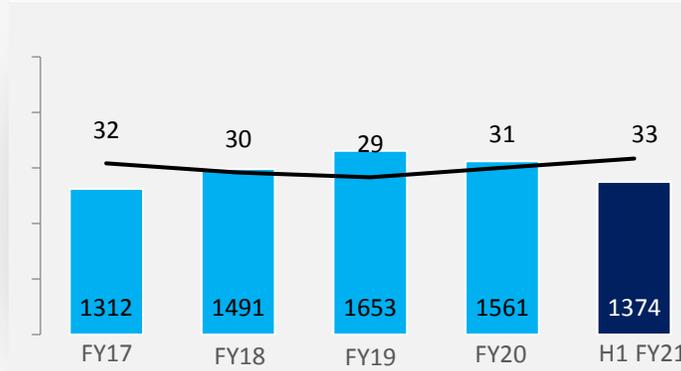
Cash Flow used in Financing (Rs. Mn)



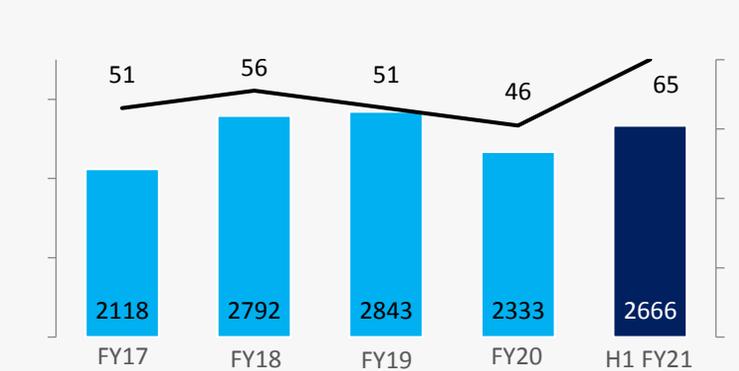
Working Capital Days



Inventory Days



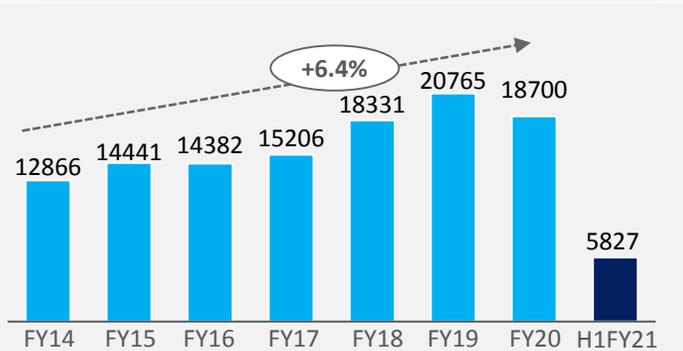
Debtors Days



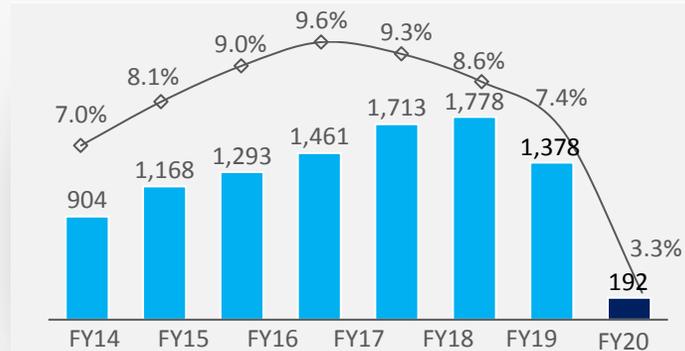
- Healthy cash generation continues

Financial Track Record

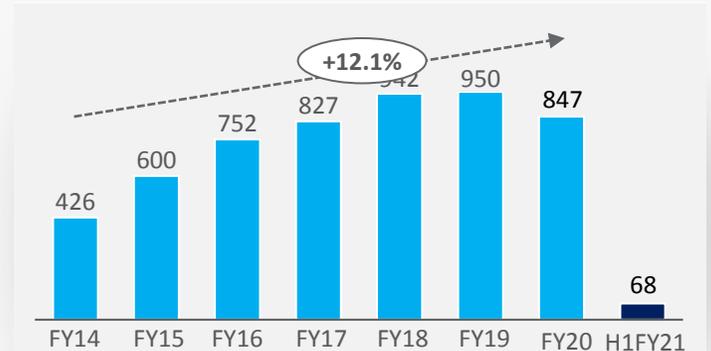
Revenue (Rs Mn)



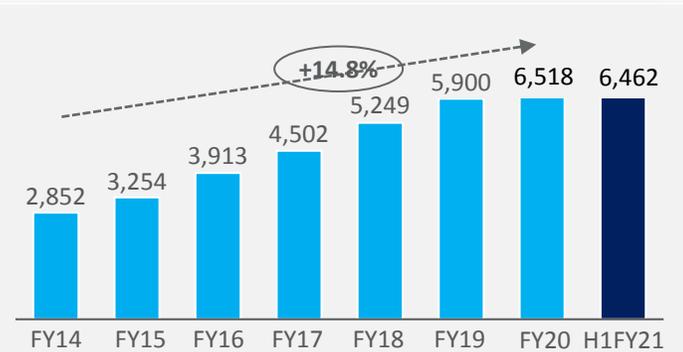
EBITDA (Rs Mn) & EBITDA Margin (%)



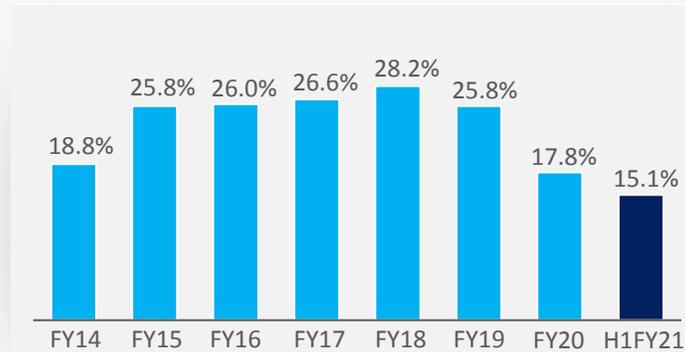
PAT



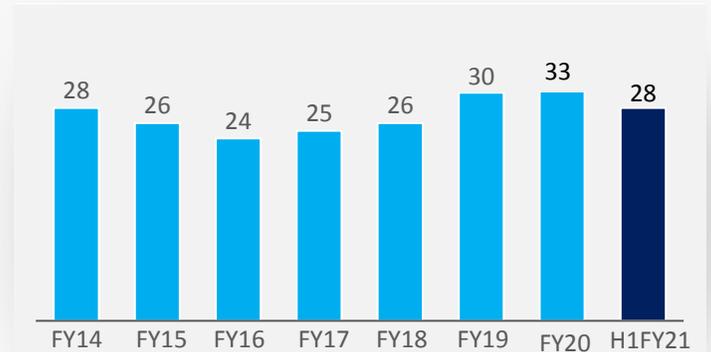
Net worth (Rs Mn)



RoCE (%)



Net Working Capital Days



^Note: Financials for FY17-20 as per IND-AS

Key Ratios

Return on Equity (%)



Return on Assets (%)



Fixed Asset Turnover (x)



Current Ratio (x)



Debt : Equity Ratio



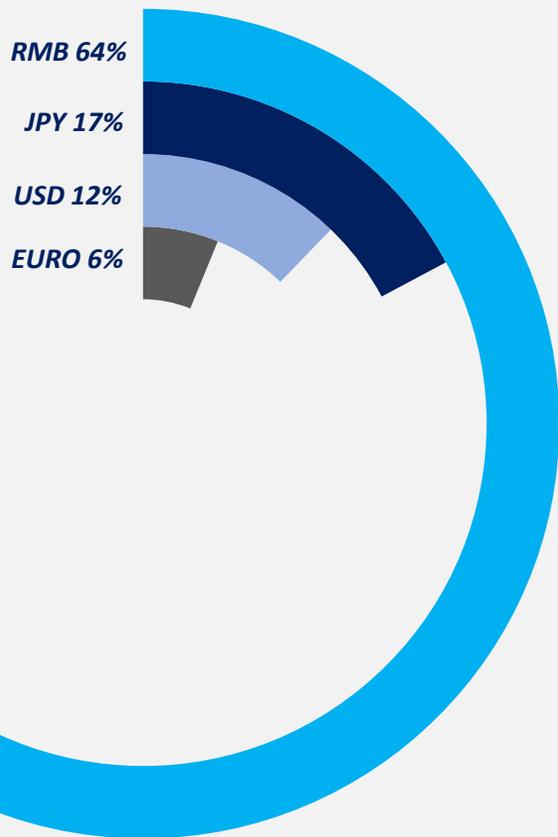
Dividend* (Rs/share) & Pay-out (%)



*Dividend excluding Dividend Distribution Tax

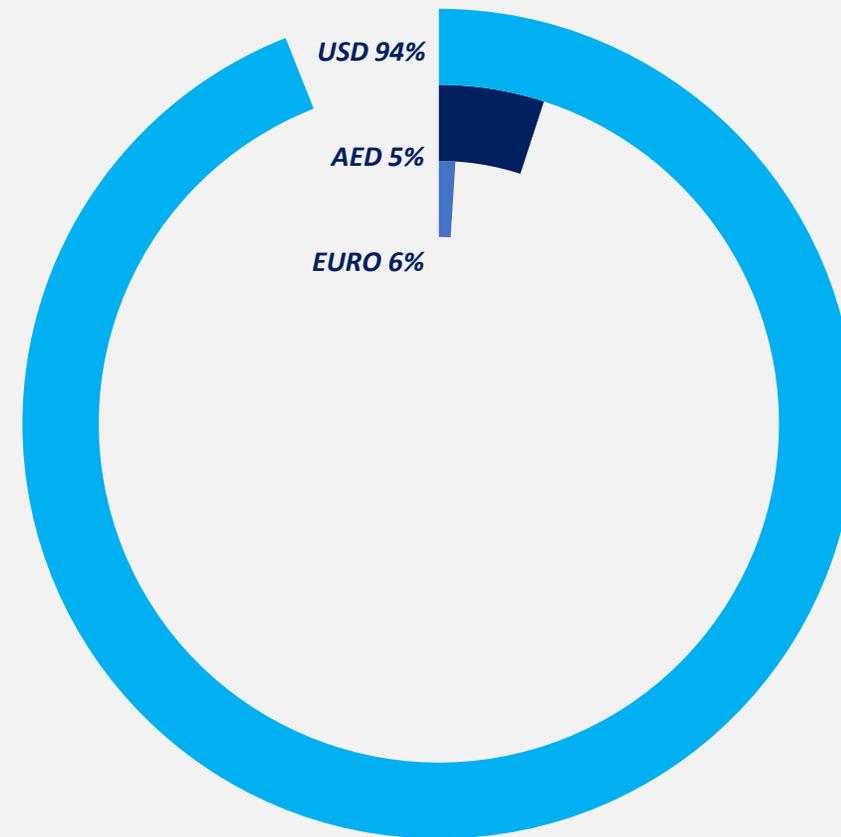
Currency Exposure

IMPORTS



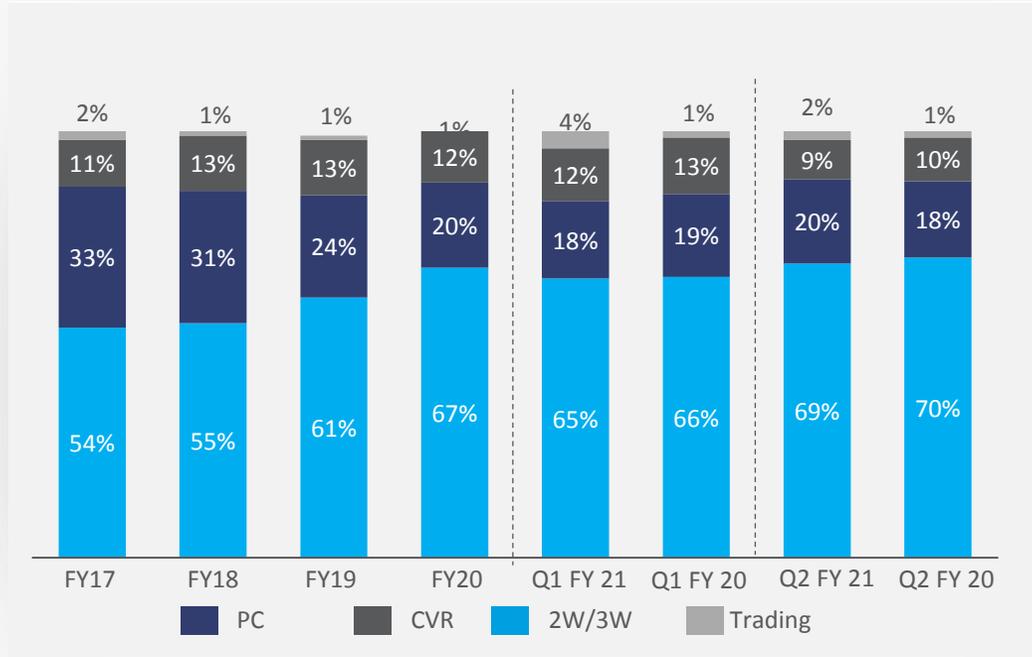
Total Import content in RMC: 15%

EXPORTS

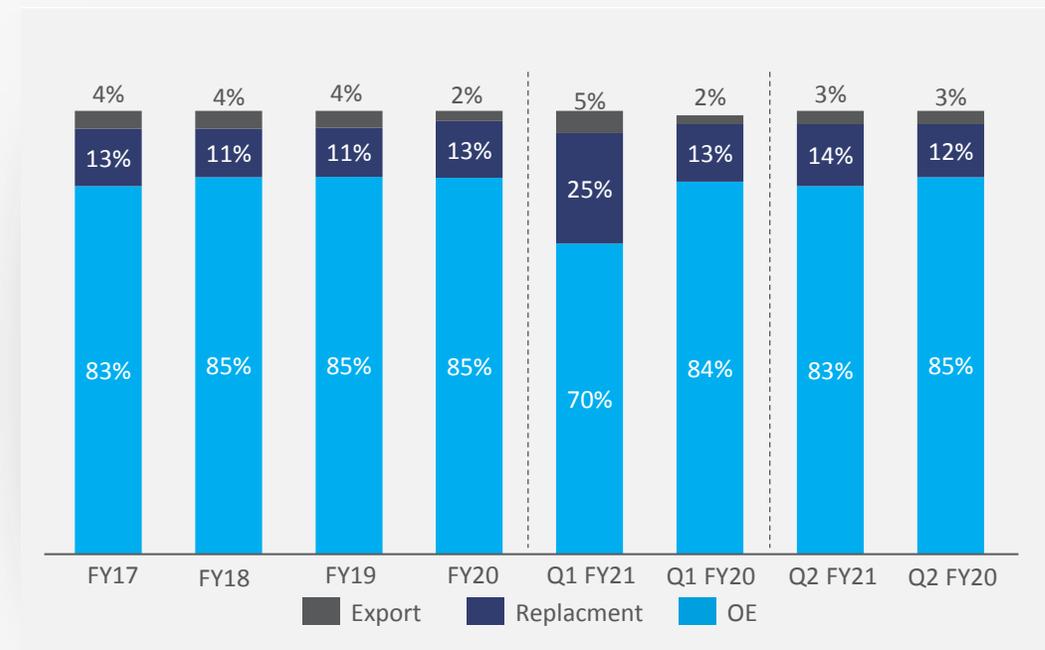


Revenue Mix (Inc. Trading)

Segment Mix



Channel Mix



- Change in product mix towards 2W segment where GIL continues to gain market share
- Passenger car segment impacted by discontinuation of Maruti Omni due to safety norms, Alto and replacement of Wagon R with newer model where GIL is not the supplier

YTD Segment Performance – 2W&3W (Incl. AM)

Performance

- Growth was primarily driven by efforts in terms of improving market share with key customers, higher efforts in terms of developing new products and on account of strong acceptance of end products in the market

New Program

- TVS Motors – N360, N282, N289 RR
- Bajaj Auto – R107, CNG

Challenge

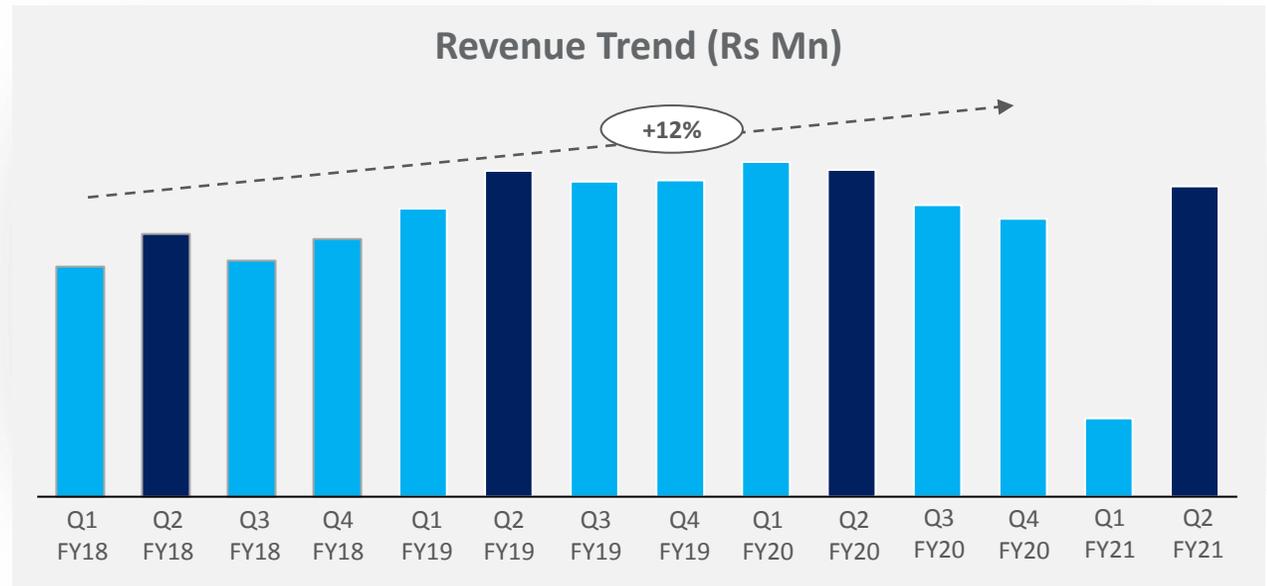
- As per SIAM data, the 2W and 3W sales declined 5% YoY and 55% YoY respectively in Q2 FY21
- Within the 2W segment, Scooters, declined by 21%, & Motorcycles and Mopeds improved by 2% and 14% respectively in Q2 FY21

Future Development

- Electric Vehicles
 - 2W - Okinawa, Ather, TVS, Hero Electric
 - 3W – Bajaj, M&M, TI

Top 3 Customers

- TVS Motors, Yamaha, Bajaj Auto



YTD Segment Performance – Passenger Vehicles(Incl. AM)

Performance

- Growth impacted by discontinuation of Maruti Omni due to safety norms and replacement of Wagon R with newer model where GIL is not the supplier

New Program

- Maruti Suzuki: YOM

Challenge

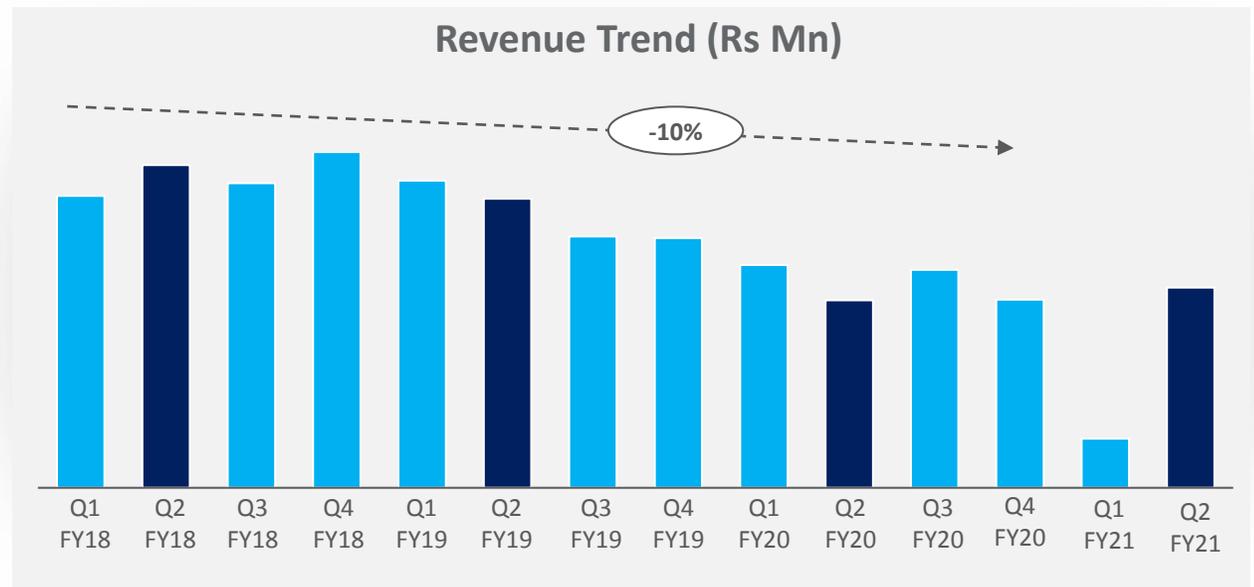
- As per SIAM data, the sale of Passenger Vehicles declined by 3% in Q2 FY21 over the same period last year
- Within Passenger Vehicles, the sales for Passenger Cars, Utility Vehicle & Vans declined by 12% YoY and improved by 15% respectively in Q2 FY21

Future Development

- M&M (3), VW (2), PSA (1), TML (1)

Top 3 Customers

- Maruti Suzuki, Volkswagen, Mahindra & Mahindra



YTD Segment Performance – Commercial Vehicles(Incl. AM & Railways)

Performance

- Growth impacted by significant cut in production volumes by OEMs
- Drop in M&HCV in Q2 FY21 is over 41% YoY, LCV's 7% YoY

New Program

- WABCO- Air suspension, MTBD- ICV 16T & Force Motors – T1 3350

Challenge

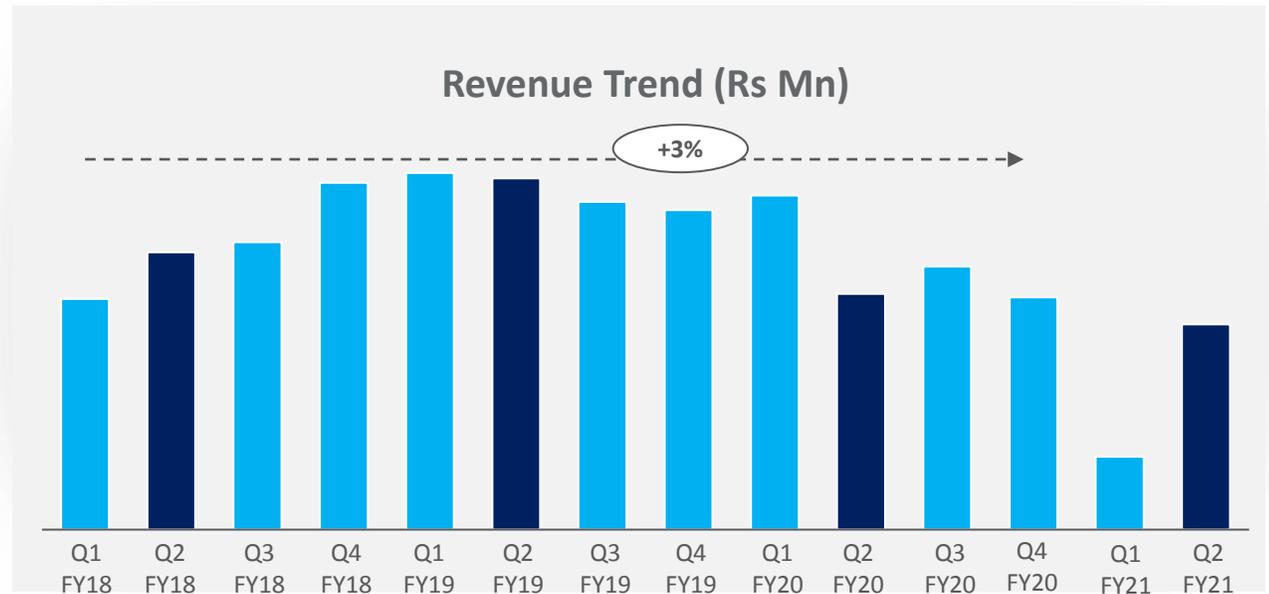
- As per SIAM data, the overall commercial vehicles segment registered a decline of 16% Q2 FY21 as compared to Q2 FY20
- Medium & Heavy Commercial Vehicles (M&HCVs) sales declined by 41% YoY and Light Commercial Vehicles (LCVs) declined by 7% YoY in Q2 FY21

Future Development

- Ashok Leyland – MBP, Partner; Force Motors – T1N

Top 3 Customers

- Tata Motors, Mahindra & Mahindra, Ashok Leyland



Aftermarket

Strong Brand Equity

- Brand “Gabriel” synonymous with shock absorbers and struts
- Leadership with market share > 40%

Extensive Distribution Network

- 11 CFA locations & 664 dealer network
- ~12,000 retail outlets supported by effective sales force
- Present in the aftermarket segment across six continents

Recent Highlights

- Operationalized two product lines which received positive market response (drive shaft, break fluid & Brake pads)
- Appointed new channel partners for Latin America and Africa
- Growth of 6% which is ahead of market in very tough market domestic conditions

Widest Product Range

- Launched 150 SKU’s LY
- More than 750 SKU’s launched in last 5 years
- Continuous focus on expanding Product Portfolio

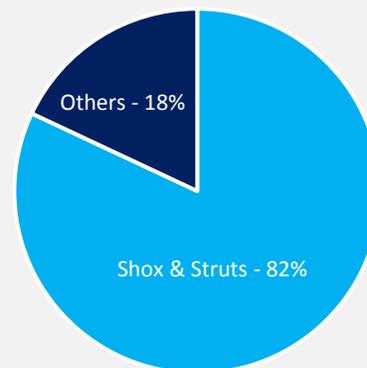
Presence Through Allied Products

- Leveraging Brand Strength & Distribution Network
- 11 New Product lines launched successfully

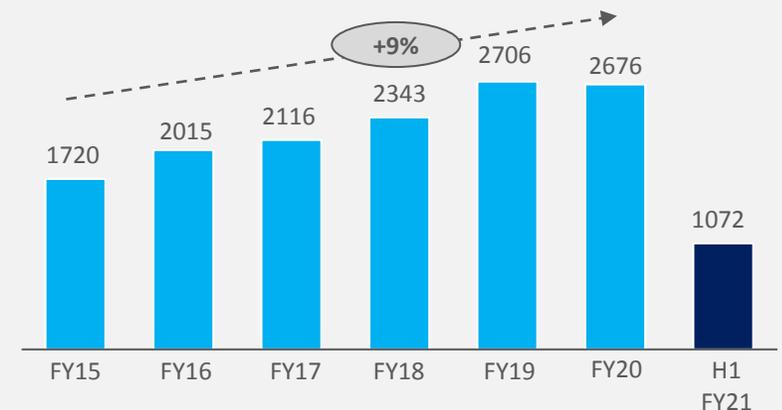
Focus Areas & Outlook

- Develop more products for the core segment
- Increase sales through national channels
- Major focus in B & C class towns
- Leveraging Brand Gabriel by launching new product lines
- Launch 200+ SKUs and kickstart CRM model to forge stronger ties with key clients
- Focus on export markets with share of 20% by 2023

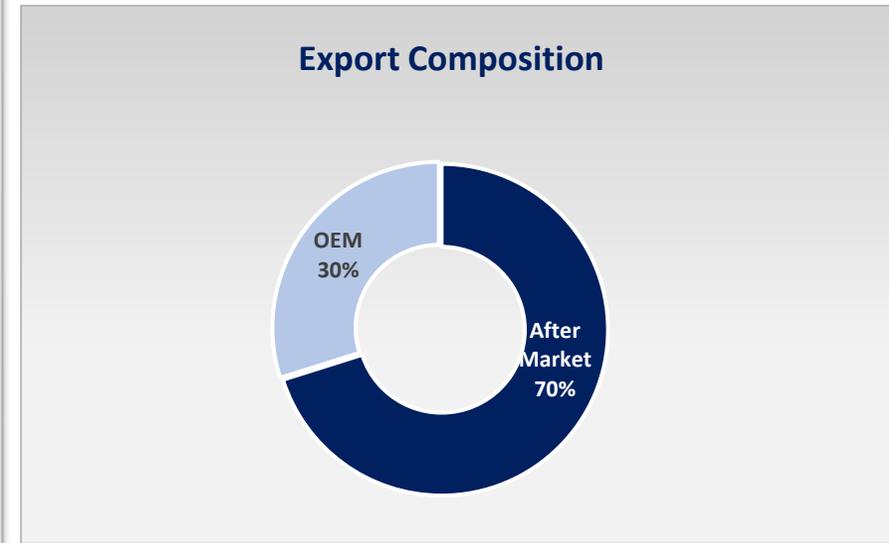
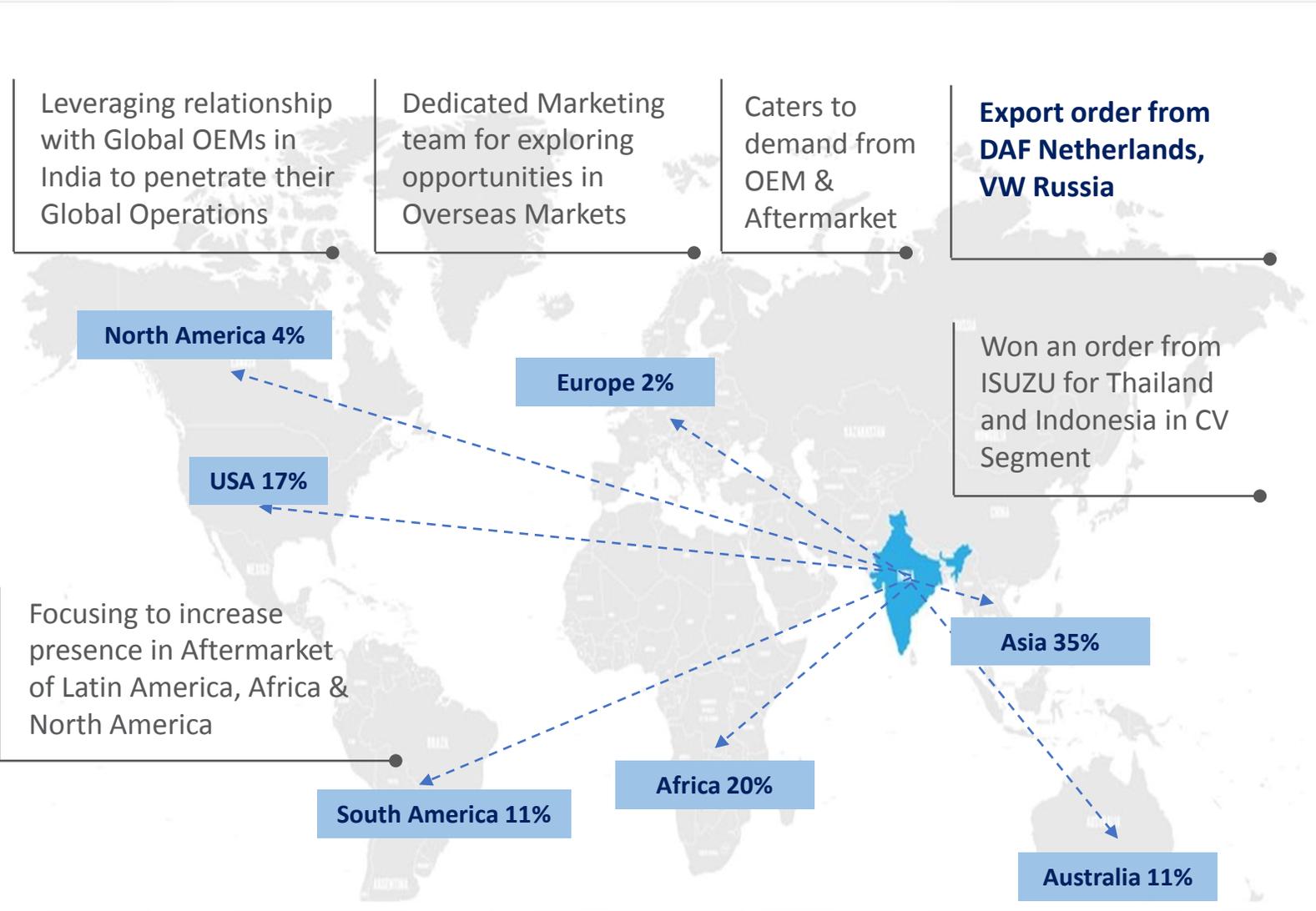
After Market Parts



Aftermarket Sales (Rs. Mn)



Creating Global Presence through Exports



Exports

CVBU



DAF NETHERLAND



LATERAL DAMPER

PCBU



VW RUSSIA



REAR SHOX

VISION

TO BE IN THE
GLOBAL
TOP 5
IN SHOCK ABSORBERS
MANUFACTURERS IN THE WORLD



Exports



Domestic Dominance



M & A



Technology

Technology



R&D Centre at Chakan Pune



Ride Trailer

Gabriel's journey of five decades is marked by strong research and development, innovation and technological alliances that make it a preferred OEM supplier



Corporate Overview

Gabriel At A Glance

Corporate Profile

- Incorporated in 1961
- Pioneer of Ride Control Products in India with state-of-the-art integrated operations
- Strong R&D focus, employing 60 specialists, highest in the industry
- Experienced, professional management team and Board of Directors
- Marquee clientele across all vehicle segments
- Market Leadership in Aftermarket
- Impetus on Sustainability and Environment: 1,984 MT Reduction in Carbon Footprint over last 6 years; 19.5% of power from renewable sources in FY19 from 0% in FY14
- Consistent dividend track record since '98

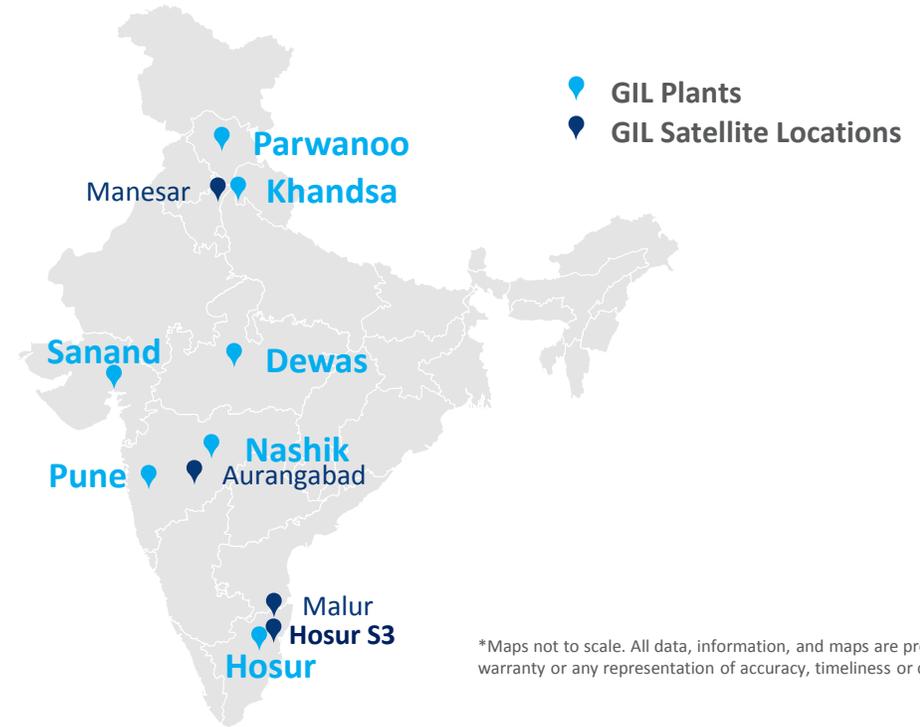


#90 OVERALL

Recognized fifth year in a row

Financial Strength (FY20)

Revenue	PAT	ROCE	Net Cash
INR 18,700 Mn	INR 847 Mn	18%	INR 1326 Mn



*Maps not to scale. All data, information, and maps are provided "as is" without warranty or any representation of accuracy, timeliness or completeness.

Key Metrics

500+ New Product Additions	25 Countries of Presence	664 Distributors
7+4 (satellite plants) Manufacturing Plants	75 Patents Filed	3,684 Employees

Strategic Manufacturing Footprint

Plant Location	Segment Served	Commencement Year	Products	Clients
Nashik	2W / 3W	1990	Shock absorbers, front forks	Bajaj Auto, HMSI , Suzuki, Yamaha, Piaggio, M&M, Atul Auto
Hosur	2W / 3W	1997	Shock absorbers, front forks	TVS, HMSI, Royal Enfield, Yamaha, Suzuki, M&M
Parwanoo	2W, PV, CV, Aftermarket	2007	Shock absorbers, front forks, struts	TVS, Tata Motors, M&M
Chakan	PV, Railways & 2W	1997	Shock absorbers, struts	Volkswagen, M&M, Toyota, Tata Motors, Bajaj Auto, Piaggio & Indian Railways
Khandsa	PV	2007	Shock absorbers, struts	Maruti Suzuki, Honda Cars
Sanand	2W, PV	2010	Shock absorbers, struts (final assembly)	HMSI, Tata Motors
Dewas	OE, Aftermarket and Exports	1992	Shox – Commercial Vehicles	Tata Motors, M&M, Daimler, Force Motors, Ashok Leyland, VECV

Proximity to OEMs Ensures Just-in-Time Supply As Per Demand While Rationalising Logistics Costs

Sticky Relationships with Marquee OEM Client Base

2/3 Wheelers



Passenger Cars

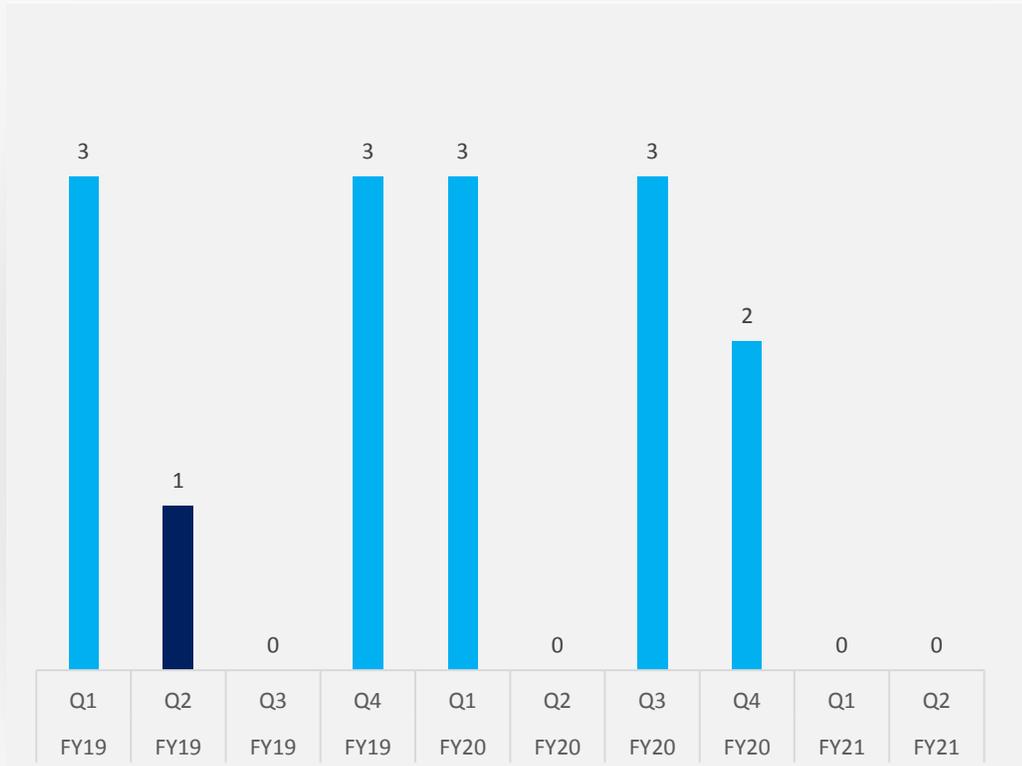


CV & Railways

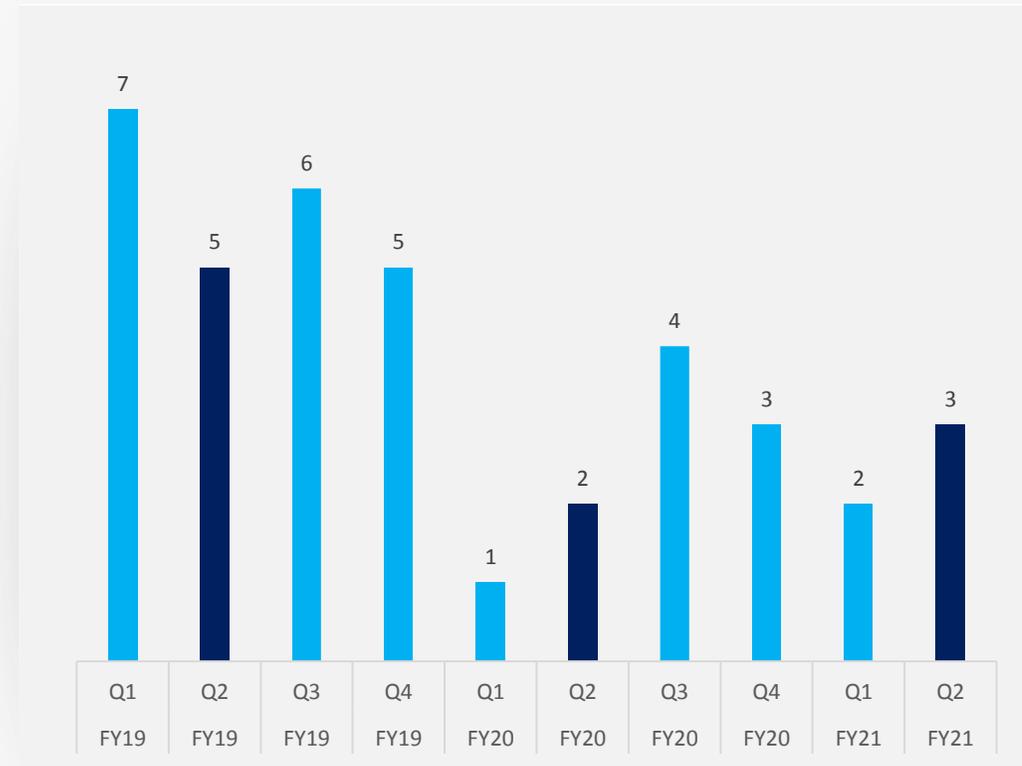


Safety Development

Accident



First Aid



Human Resources



In-depth sectoral knowhow

Seasoned Resources

Strong employee connect

Partnership-oriented approach

Employee-friendly systems and policies

Key Metrics	Mar'20	Mar'19	Mar'18
Revenue per employee (Rs Cr)	0.51	0.53	0.45
Average employee experience (person years)	8.0	7.0	6.5
Investment in training programmes (Rs Cr)	2.21	1.45	1.44
Employees covered under training programmes (%)	80%	65	40

“Great Place to Work” – 5th Consecutive Year

2019

- **Rank #90** among Top 100 Companies to work for in India

2018

- **Rank #89** among Top 100 Companies to work for in India
- Ranked in Top 25 workplaces in manufacturing in India



2017

- **Ranked #2** in Auto & Auto Component Industry
- Rank #52 among Top 100 Companies to work for in India

2016

- **Ranked #3** in Auto Component Industry
- **Rank #70** among Top 100 Companies to work for in India



2015

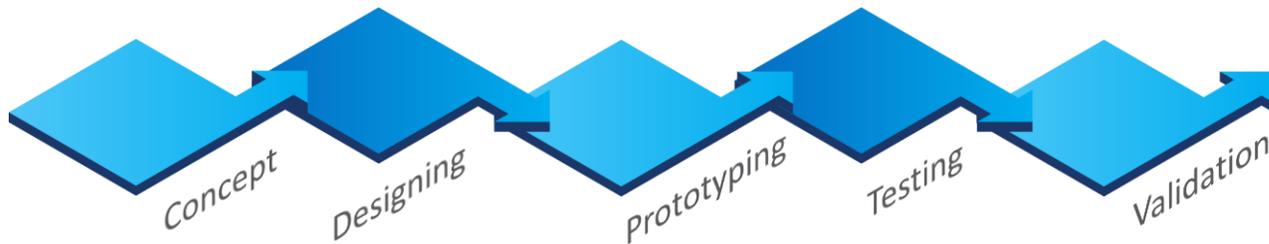
- **Ranked #2** in Auto Component Industry
- **Rank #43** among Top 50 Companies to work for in India

2012

- **Ranked #3** in Auto Component Industry
- Recognized among the Best Companies in its Industry

Strong In-house R&D & Technology Partnerships

End-to-End Product Development Capabilities



DSIR Approved state-of-the-art R&D Facilities at Chakan and Hosur

A strong team of 60+ Specialists

Over 75 patents filed till date

Technical Collaborations with KYB Japan
(Passenger Cars) and KONI (Commercial Vehicles)

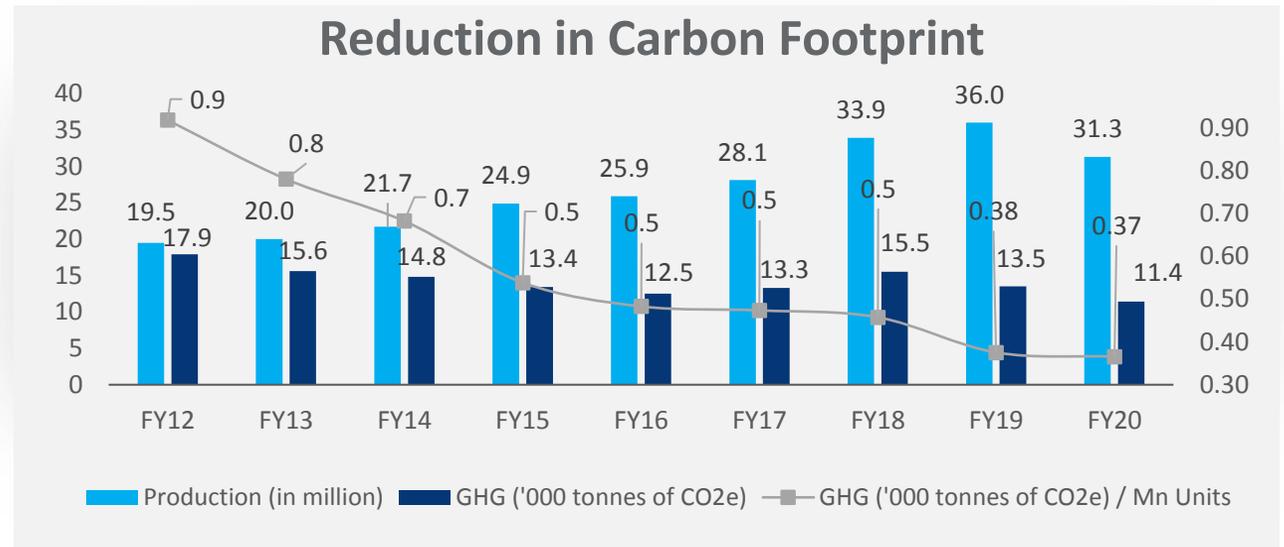
Key Initiatives

- In-house facility for customers for ride tuning of vehicles
- Advanced damper technology for the enhanced user experience
- CO2 footprint reduction through product light weighting and use of green technologies
- Virtual analysis for structural durability assessment of components
- Implementation of product life cycle management (PLM) to increase the reuse of existing components & to improve productivity
- NVH measurement and reduction techniques to address noise issues in the new generation vehicles

Environmental Sustainability



**“Sustainability Award – Automotive and Farm Division”
from Mahindra in FY18**



- Reducing energy consumption per unit of shock absorber through reduction in manufacturing losses
- 6,464 MT reduction in carbon footprint since FY12
- Invested in solar rooftops across manufacturing plants with a capacity of 1.1 MW
- Invested in group captive wind power plant to source renewable power at Hosur of 3.6 million units annually.
- 19.5% of power from renewable sources from 0% in FY14

Achieving Engineering Excellence

Designed & Developed Remote
Canister Shock Absorber

Shock Absorbers with
Floating Piston

Shock Absorber with Hollow
Piston Rod

Robotic Assembly line



Laser Welding Technology, Friction
Welding Technology, Water based
Autophoretic Paint System

Adjustable Electronic-Hydraulic
Shock Absorber for a leading SUV
vehicle in Aftermarket

Zero Discharge Chrome Plating

Shock Absorbers for High
Speed Railway Trains – LHB
Coaches

Many Firsts

Honoured with “Golden Peacock Eco – Innovation Award for Hollow Piston Rod”

CSR Initiatives

Thematic area	Parwanoo	Dewas	Nashik	Hosur
Education	<ul style="list-style-type: none"> • 11 Govt. School • 2100 Students • 18 Teacher • SNSF scholar programme @ANAND school – Increase Scholars from 1 to 4 	<ul style="list-style-type: none"> • 5 Govt. School • 766 Students • 6 Teachers • Classes for adults • MEDHAVI @ govt. polytechnic & acropolis: 10 awardees (New – 2 , Graduate – 2) 	<ul style="list-style-type: none"> • 9 Govt. School • 2856 Students • 18 Teachers 	<ul style="list-style-type: none"> • 3 school • 7 Teachers • 2637 student • MEDHAVI@PMC Tech 31 awardees (New – 15, Graduate – 14)
Skill Development (Introduction of NSDC Certification across courses)	<ul style="list-style-type: none"> • 6-month Courses in Cutting & tailoring, dress designing • Beauty culture • Computer 	<ul style="list-style-type: none"> • 6-month Courses in para nursing (Health assistance training program) 		
Health & Hygiene	<ul style="list-style-type: none"> • Doctor consultation & free medication in slums • Govt. partnership project of HIV/AIDS & RCH 			
Community Conservation	<ul style="list-style-type: none"> • Maintenance of ANAND municipal park and sports complex • Maintenance of war trophy memorial park (ANAND van vatika) • Classes for out of school students & adults 	<ul style="list-style-type: none"> • Ultra high-density mango plantation in lake view farm incl. GIL share land • Continuation of NABARD's E shakti and livelihood entrepreneurship Development program 	<ul style="list-style-type: none"> • Development Of Village Rohile as a model village 	

Board of Directors



Anjali Singh

Executive Chairperson,
Gabriel India

- Business Management at University of Westminster, UK, and Fine Arts at Central Martin's School of Arts and Design, UK
- Joined ANAND Group in 2005
- Chairperson, Supervisory Board, ANAND Group since 2011



Manoj Kolhatkar

MD, Gabriel India

- B.E. (Mechanical) & DBM, with more than 25 years of experience in Automotive industry
- Associated with Gabriel India since 2011
- Prior to this, served in TATA Group in senior roles for 22 years



Jagdish Kumar

Group President
& Group CFO,
ANAND Group

- Joined ANAND Group in September 2015
- Over 29 years of cross-cultural experience of running business at Asia Pacific level as well leading strategic planning efforts for Asia-Pacific at Global Companies like Du Pont, BILT, TCS



Aditya Vij

Non-Executive
Independent
Director

- Operating Partner, Kedaara Capital Advisors LLP
- CEO of Fortis Healthcare Ltd. from 2011 to 2014
- Spent 30 years in the Automotive and Defence Industries including 18 years with General Motors, Europe



Pradeep Banerjee

Non-Executive
Independent
Director

- VP, Supply Chain, South Asia at HUL. Director on the Board of HUL. Associated with HUL since 1980 in various senior roles
- Chairman of CII National Committee on intellectual Property and committee member on Environment, Convenor of CII National Working Group on Plastic Waste Management



Matangi Gowrishankar

Non-Executive
Independent
Director

- Graduate from XLRI in Personal Mgt & Industrial Relation, with more than 40 years of experience in Banking, Financial Services, IT, Manufacturing, Sports & Oil Industry
- Was board member of NHRDN and one of 20 mentors for NHRDN Womentoring Initiative
- Qualified coach and works with senior business leaders to support business leadership effort

Management Team



- Masters in Quality Management with over 20 years of experience
- Associated with Gabriel since 1999

Atul Jaggi

Chief Operating Officer, Two and Three Wheelers and Commercial Vehicles Business Unit



- MS Industrial Engineering, BITS Pilani
- PGDBA – Finance/Strategy, IFMR
- Over 25 years of experience
- Associated with Gabriel since September 2020

Vasudevan R

Chief Operating Officer, Passenger Cars Business Unit



- B.E. (Mechanical) with over 25 years of experience
- Associated with Gabriel since April 2007

Amitabh Srivastava

Chief Operating Officer, Railways and Aftermarket Business Unit



- MBA, Michigan, UDA, 2004, PG (MS Industrial Engineering), University of Ohio, USA, B.E. (Mechanical)
- Over 17 years of experience
- Associated with Gabriel since April 2010

Umesh Shah

Head of Strategy



- CA & CFA, DIFRS, FRM more than 17 years in the Mining, Construction, Metals, Garments and Automotive industry
- Associated with Gabriel since Sept 2019

Rishi Luharuka

Chief Financial Officer



- B.E. (Mechanical) with over 30 years of experience
- Associated with Gabriel since March 2004

Rajendra Abhange

Chief Technical Officer



- Masters in Personnel Management
- Associated with Gabriel since April 2016

Manoj Sharma

Chief Human Resource Officer



- B.E. (Production Engineering) with over 25 years of experience
- Associated with Gabriel since November 2012

Prashant Shah

Chief Purchase Officer



- Diploma in Management
- Associated with Gabriel since July 2001

CR Vijaykumar

Head Central Quality

Awards & Accolades



'India's Best Workplaces for Women' – 2019: Top 75



Gabriel was awarded for Delivery Management by Honda Motorcycle and Scooter India, at their 21st Supplier Convention 2020



Gabriel Chakan Team "Spartans" emerged as the winners at National Level Toyota Kirloskar Supplier Association Quality Circle Competition

Awards & Accolades



Gabriel Chakan is certified as ISO 27001 – Recognized & Trusted Information Security Management Standard

Gabriel Chakan Team won award for Quality by Toyota Kirloskar Motor Pvt. Ltd. in April 2020



Strategy
Going Ahead

Growth Strategies



Financial Worthiness

- Debt reduction
- Break even point (BEP) reduction
- Simplification of parts
- Automation

Customer Focus

- Enhancing customer delight and deepening relationships
- Collaboration and product co-development

Aftermarket

- Product development
- Expanding reach
- Exports focus

Technology & Innovation

- Improvement in quality
- R & D focus
- Sustainable manufacturing
- Innovation culture

Customer & Product Focus, Aftermarket Expansion and Export Push

Strengthening Focus Areas



Cultural Transformation

- Increasing organizational competencies and process orientation
- Regular trainings focused on talent development and leadership development with the help of ANAND University
- Promote equal opportunity and diversity
- Internal culture of collaboration, execution and accountability



Sustainability

- Reducing energy consumption per unit
- Using / improving energy efficiency using LED lighting technology at its plants, saving energy & reducing carbon footprint
- Installation of renewable sources of energy at various plants



Financial Robustness

- Leverage brand and diverse product portfolio to drive growth
- Focus on driving operational efficiencies, judicious allocation of capital while maintaining a lean balance sheet



Manufacturing Excellence

- Customer centricity
- Deepening competence, enhancing product quality and expanding product portfolio
- Adopted ANAND House of Quality Culture
- Driving increased asset utilization



Research & Development

- Investments in robust testing infrastructure to enhance value proposition to customers at compelling price
- Collaborations with global technology partners

To be amongst the 'Top 5 shock absorber manufacturers in the world' by 2025

For further information, please contact:

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