



# Annual General Meeting

31<sup>st</sup> July 2019, Chennai





## FY19 Highlights



**MISSION:  
ACCOMPLISHED**



To be in the  
**Global Top 10**  
in M&HCV trucks  
(>7.5t GVW)

and

**Global Top 5**  
in M&HCV buses  
(8m and above)

in volume terms



## OUR VISION

**To be a  
Top 10  
Global CV Player**

creating reliable and differentiated  
products and solutions,  
while delivering outstanding  
stakeholder value



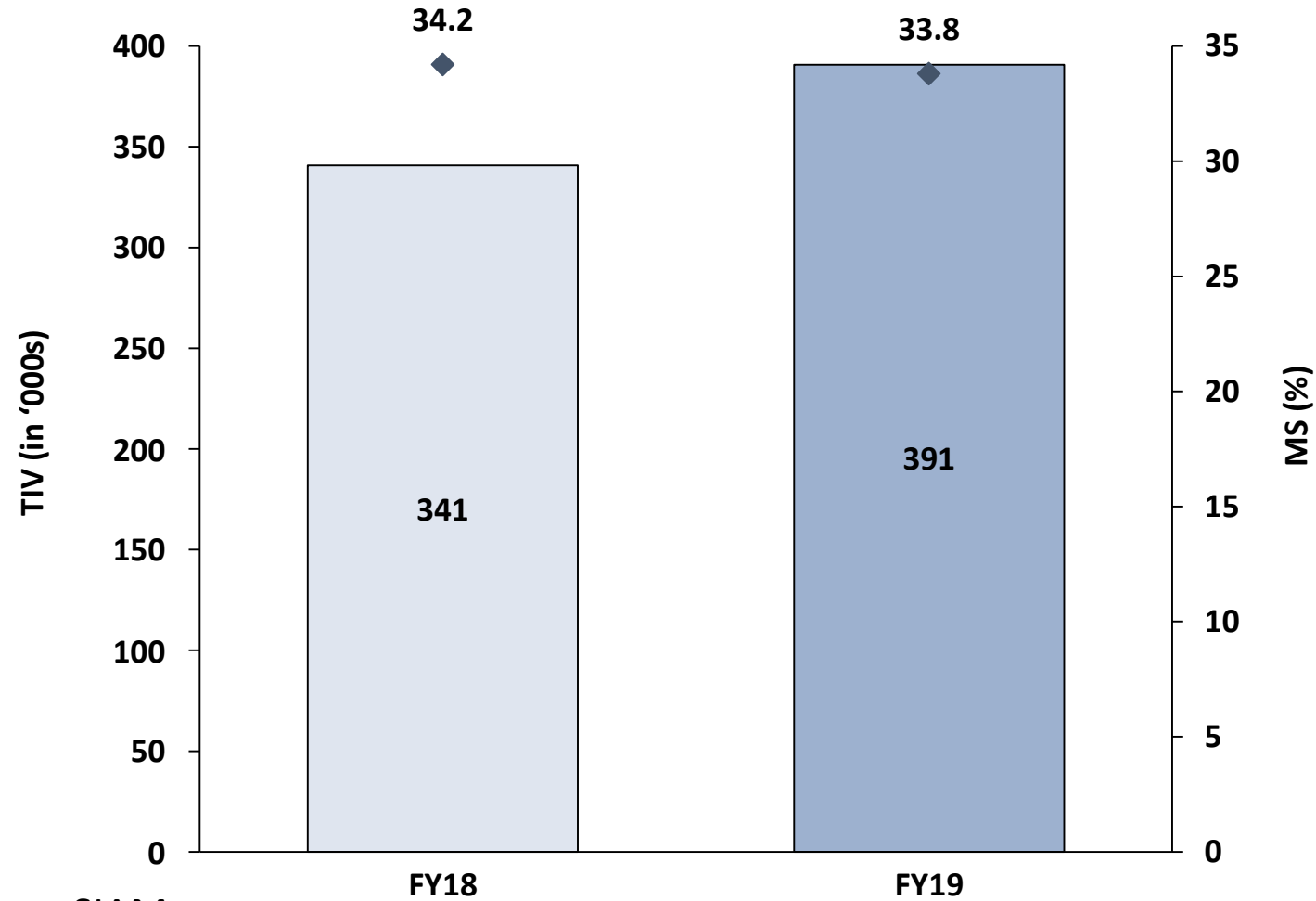
**4123 - 10X2 MAV | 16 wheeler | With twin tyre patented lift axle**

## Record

- MHCV sale volume 142858 nos.  
(FY'18 131432 nos.)
- LCV sale volume of 54508 nos.  
(FY'18 43441 nos.)
- MHCV production volume 149934 nos.  
(FY'18 121736 nos.)
  - PNR produced 55425 chassis in FY '19
  - Hosur 2 produced 1 lac + vehicles in FY '19
  - Foundries production crosses 1 lac MT
- Revenue Rs. 29055 Cr  
(FY'18 Rs. 26356 Cr) up 10%
- EBITDA at Rs. 3136 Cr  
(FY'18 Rs. 2964 Cr) up 6%

# Domestic MHCV Industry:

## TIV up by 15% & AL holds market share ~34%

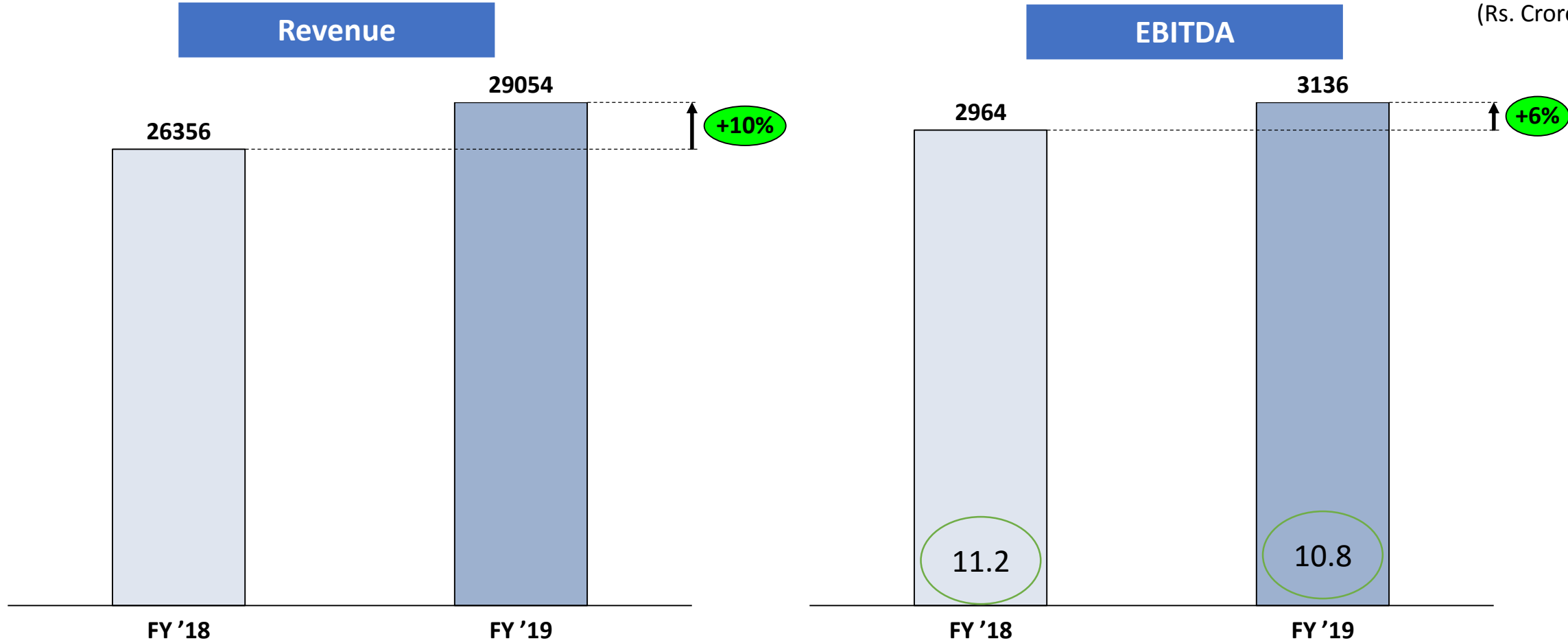


Source: SIAM

# Revenue grew by 10% driven by volume growth; We delivered double digit EBITDA in a tough year

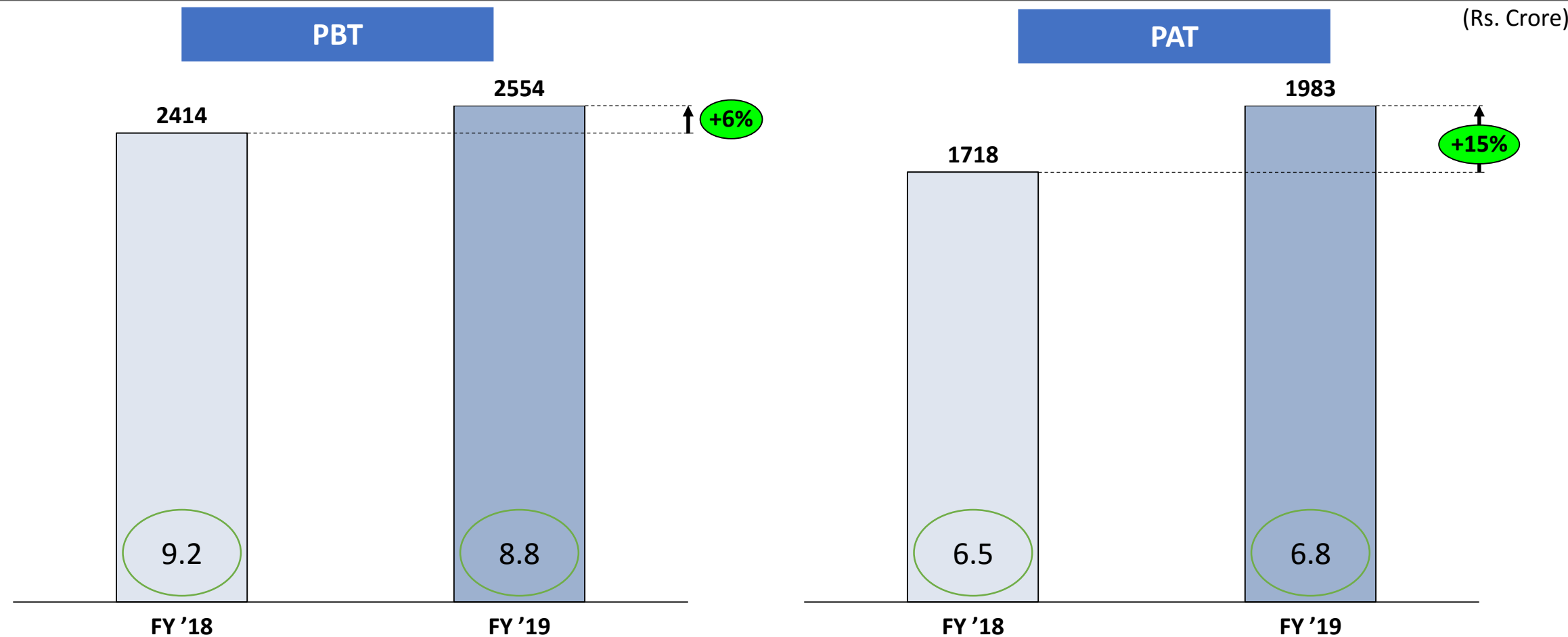


(Rs. Crore)



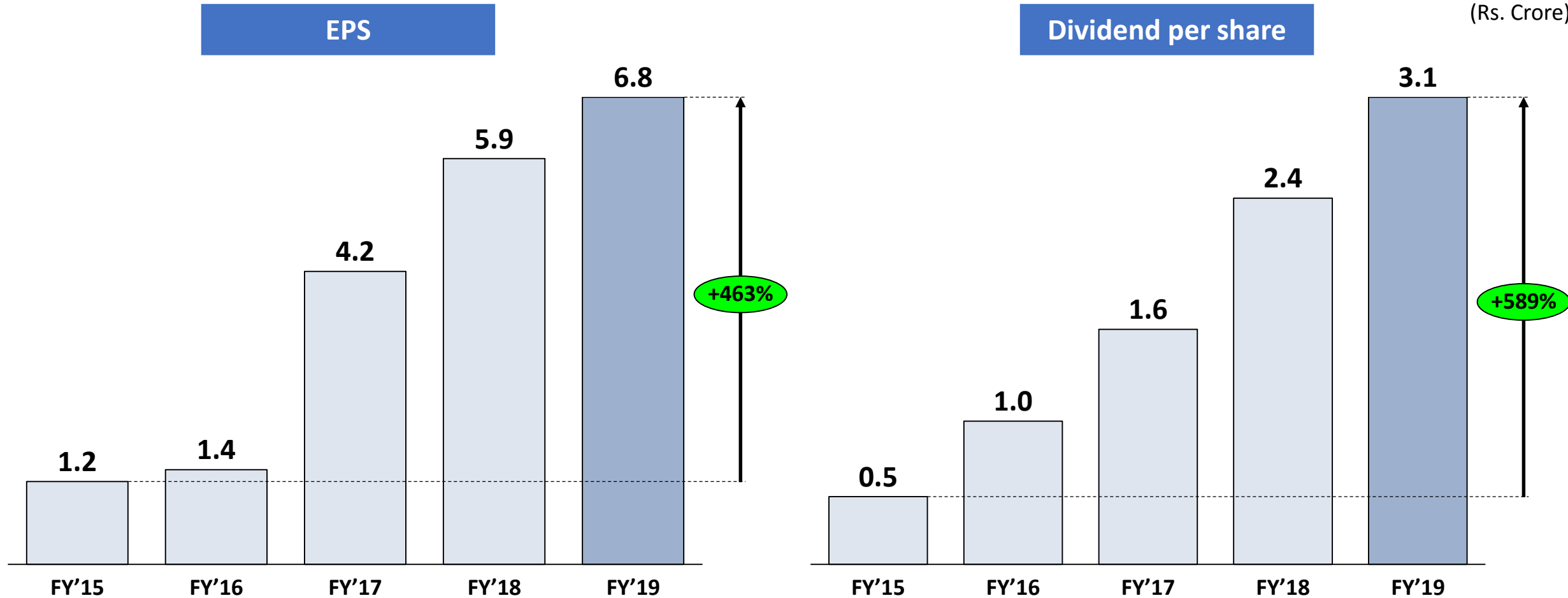


# PBT grew in line with EBITDA; Tax benefits from LCV merger drove PAT margin expansion





# Fifth consecutive year of growth in earnings and dividend per share



# We launched new products



**47.5T Rigid Truck  
with Twin Tyre Pusher LA**



**Guru 10T**



**Boss 913  
Tipper**



**Boss 1916  
with Sleeper cabin**



**High Horsepower Tippers**



**32ft Container truck**



**Side Wall trailer**



**7cum RMC**





# And launched a few more...



DOST Family Refresh



DOST+ Bangladesh



Partner -Bangladesh



Partner 17 ft



MiTR 31 S AC  
MiTR 34, 39 S Non AC



Partner Ivory Coast





# We electrified Gujarat

- Ashok Leyland unveiled 'Circuit'- India's first BRTS electric bus
- Electric buses deployed in Ahmedabad



EXHIBIT



THEME – FUTURE PERFECT



CIRCUIT S



TECHNOLOGY DISPLAY



INAUGURATION



MUNICIPAL COMMISSIONER'S VISIT



AWARD TO THE DESIGNER  
MR.CHANDIK



AJL OFFICIALS VISIT THE STALL



# We continue to expand into new markets



Regional websites operative in 5 regions  
UAE, Russia, Ivory Coast, Nepal, & B'desh



Partner launched in UAE, Ivory  
Coast & Ghana



Auto Expo in Bangladesh



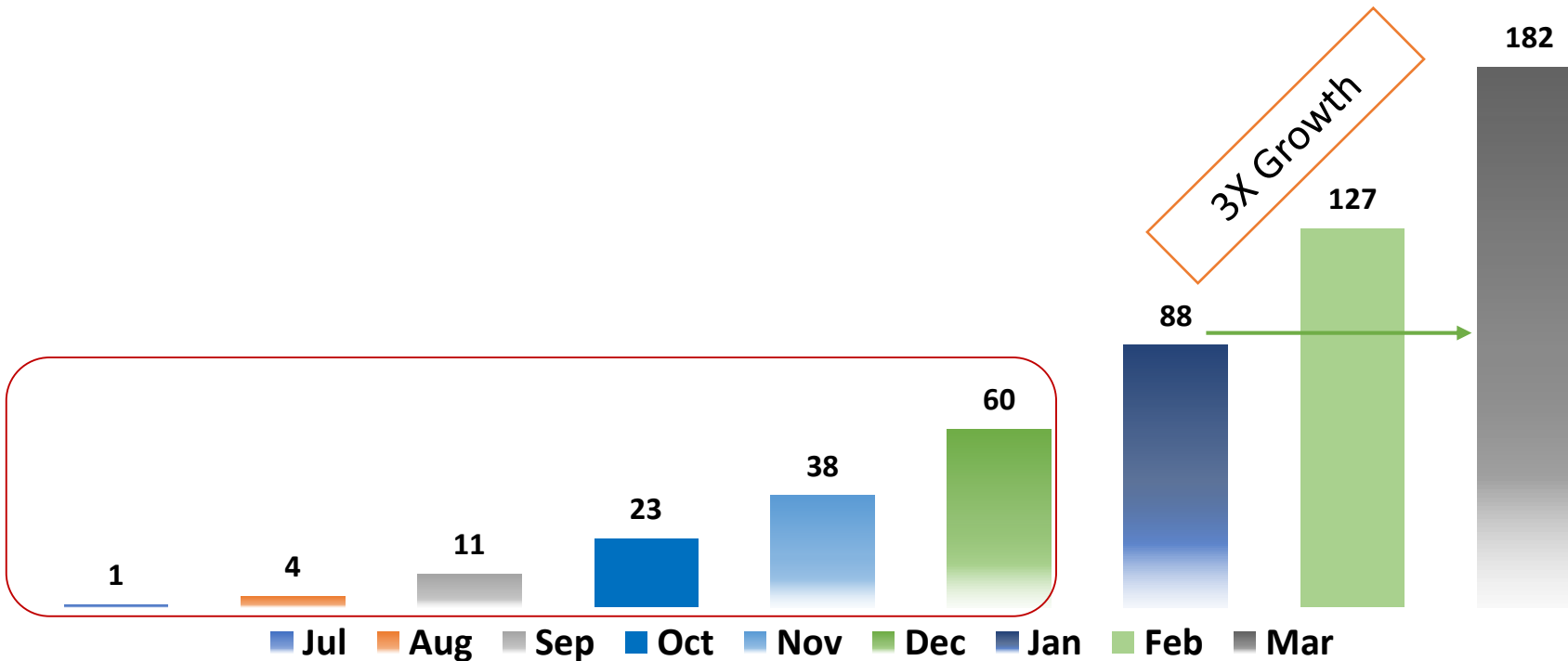
New Parts warehouse opened in  
UAE Jabel Ali Free Zone



# Customer solution business (CSB) grew rapidly within just 9 months of launch

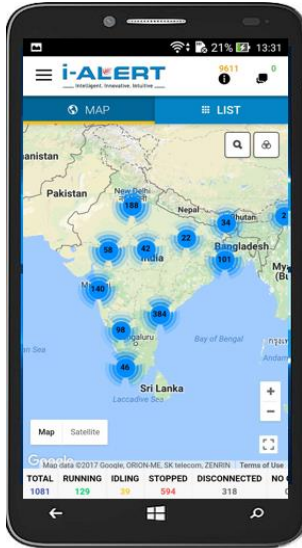


## CUM. GMV\* (IN CRS.)



*\*Gross Merchandize Value (GMV) - Value of transaction done through eN-Dhan cards*

# Our digital offerings gained more traction



- Monitor location & health
- Reach: Pan India
- User base: **48K+ customers**
- **125K+ vehicles**



- Customer base 75,000+
- More than 1,25,000 Fuel Cards issued
- Gross Merchandise Value (GMV) Rs 182Cr

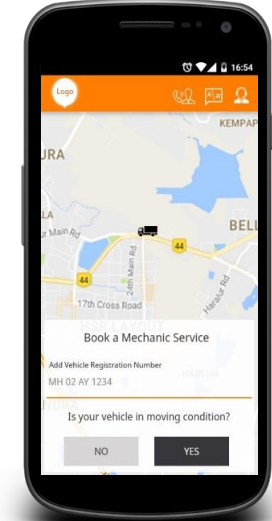


## Adoption

- 53,000+ Registrations
- 31,500+ Orders
- 14 Lakh+ search events

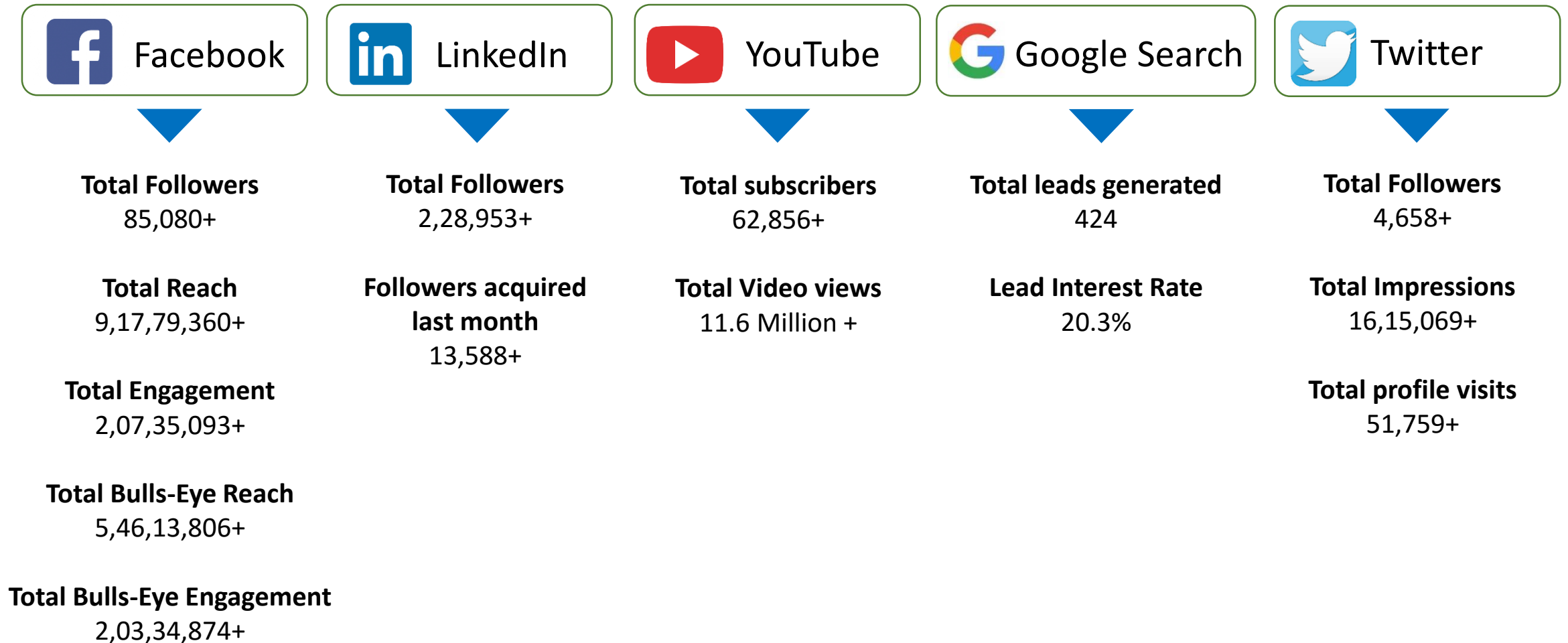
## Fulfilment

- 11,000+ SKUs
- 99.5% Order fulfilment
- 16,000+ Pin Codes



- Annualised GTV of Rs. 750 Cr
- 8.5 lakh + transactions
- 41500+ customers
- 275000+ vehicles enrolled
- 12000+ workshops registered

# We expanded our social media footprint



\*Engagement calculation includes video views



# FY'19 was an year of awards and recognition



EV Buses of the Year Award



Gold – Automotive Digital Communication – Big Bang 2018



Ashok Leyland becomes a part of the prestigious Superbrands community



Gold – Best Social Media Brand – Automotive – SAMMIES 2018



Ashok Leyland's debut on Forbes Asia's FAB 50 List





# FY'19 was an year of awards and recognition



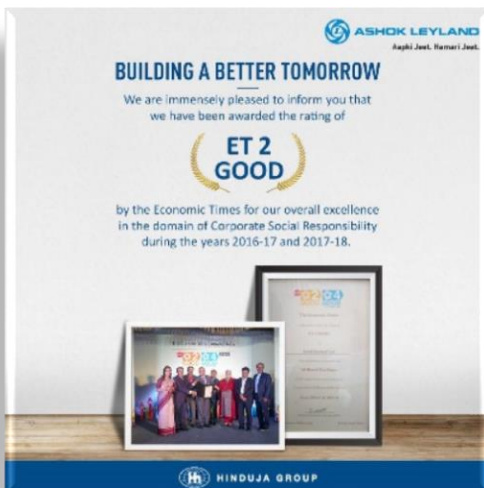
Golden Peacock award for Sustainability



DOST+ wins the 'Pickup of the Year' and 'SCV of the Year' award



Ashok Leyland wins Apollo "Promising debut" and "Pick up of the year" awards



Ashok Leyland wins ET 2 GOOD award for overall excellence in the domain of CSR from 2016 to 2018



Ashok Leyland listed as one of the most respected companies in India in 2018







# AL grew from 37<sup>th</sup> rank to 34<sup>th</sup> rank in Best Indian Brands

01  6% ₹ 787.22 bn	02  12% ₹ 428.36 bn	03  -13% ₹ 322.35 bn	04  14% ₹ 298.63 bn	05  9% ₹ 280.95 bn	06  3% ₹ 256.20 bn	07  5% ₹ 243.67 bn	08  9% ₹ 183.89 bn
09  5% ₹ 169.93 bn	10  6% ₹ 168.97 bn	11  13% ₹ 154.86 bn	12  8% ₹ 149.91 bn	13  18% ₹ 137.28 bn	14  -1% ₹ 134.50 bn	15  5% ₹ 110.91 bn	16  20% ₹ 108.34 bn
17  13% ₹ 96.06 bn	18  5% ₹ 94.70 bn	19  -5% ₹ 87.96 bn	20  10% ₹ 86.10 bn	21  -4% ₹ 84.53 bn	22  21% ₹ 68.81 bn	23  8% ₹ 66.78 bn	24  13% ₹ 64.22 bn
25  19% ₹ 50.76 bn	26  9% ₹ 47.16 bn	27  8% ₹ 46.19 bn	28  4% ₹ 40.43 bn	29  15% ₹ 37.80 bn	30  -13% ₹ 32.56 bn	31  12% ₹ 31.59 bn	32  4% ₹ 27.43 bn
33  NEW ₹ 26.86 bn	34  16% ₹ 23.11 bn	35  14% ₹ 22.90 bn	36  -3% ₹ 22.66 bn	37  NEW% ₹ 20.16 bn	38  2% ₹ 19.72 bn	39  NEW% ₹ 19.19 bn	40  13% ₹ 17.21 bn

www.intelbrands.com

Ashok Leyland is among the fastest growing brand with 16% growth in brand value

# We launched AL university and new learning and development initiatives



**AL Univ Boot Camp – Batch 1**  
56 APS Projects / 106 trainees



**AL Univ Boot Camp –Batch II**  
Initial Learning Phase /35 trainees

**5ML**  
5 Minute Learning

**My Incredible Opinion!**

The good thing about the 5 ML Platform is that the videos make a short point in under 3 minutes and it is easy to remember the learnings. The videos help to reinforce already known, as well as, new perspectives in terms of attitude and behavior.

In my view – these are interesting learning nuggets to take!

**5 Minute Learning via Digital Micro Learning Platform**



**COURSERA for Business**  
610 Global University Certifications



**SCRUM (AGILE Transformation)**  
86 executives



**Launched the new programs**  
ALITA, PEP and CARE





# Conferred with Golden Peacock award for Sustainability

Pond



## Water Positive

- Zero water discharge
- Reduction in water consumption
- Rain water harvesting

Dense forest



## Reduced Carbon Foot print

- Reduction in energy consumption
- Battery operated material handling equipment
- Tree plantation

Grinding dust converted as pavement blocks



## Zero waste to land fill

- Four plants achieved zero waste to land fill
- Reduction in hazardous waste generation
- Reuse of waste



## Renewable Energy

- 34% of energy consumed is green



## Bio Diversity

- Creation of dense forest
- Ponds at plants



# Conferred with Golden Peacock award for Risk Management





# We continued to enhance the environment: Ennore



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# We continued to enhance the environment: Hosur 1





# We continued to enhance the environment: Bhandara





# We continued to enhance the environment: Hosur 2





# We continued to enhance the environment: Pantnagar





# We continued to enhance the environment: Foundries





# We continued to enhance the environment: VVC





# Our efforts extended beyond our boundaries



## Lake rejuvenation at Tiruvallur and Hosur





# Rain water harvesting across plants



2 new ponds created inside our plants...



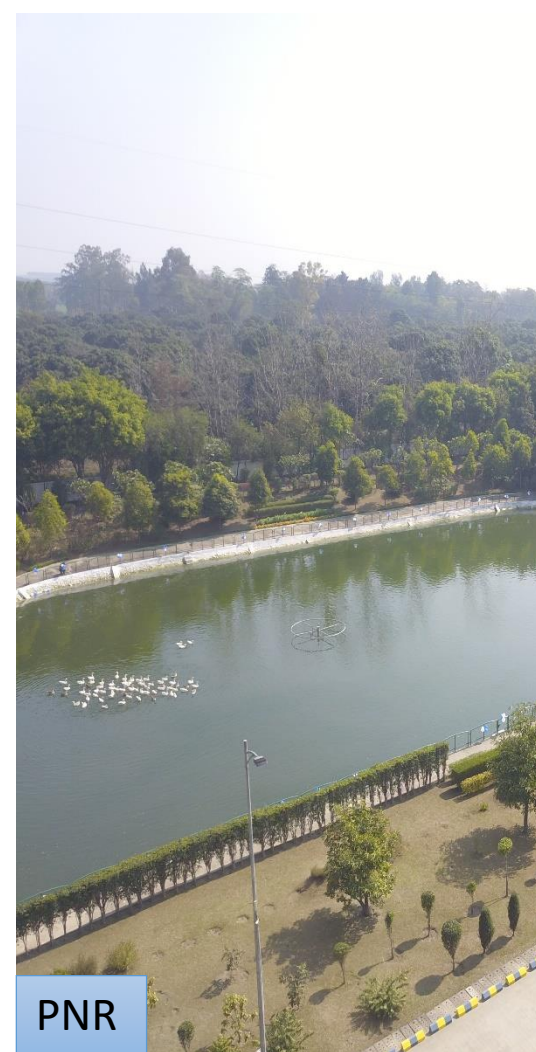
Sriperumbudur



Ennore



Hosur



PNR



71 new recruits

# CSR initiatives- Touching lives and engaging communities



Indicators	2015-16	2016-17	2017-18	2018-19
Number of Schools covered	36	108	151	333
Number of Children covered	4000	14,500	19,500	34,431



FICCI CSR Award



Launch of hot nutritious breakfast in partnership with Akshaya Patra Foundation (covering 7840 children)



Digital Learning Lab inaugurated in Model School in Chennai



Economic Times Recognition as 2Good





# CSR Highlights

In 4 years, a growth of 10x schools & a growth of 8x children



Education



Health



Nutrition



Sports



Music

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Thank You