



# Global Conference – Investors Meet

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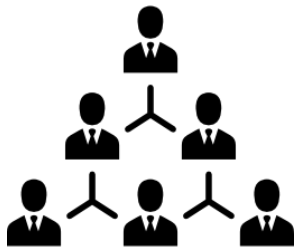
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# The Hinduja Group



More than  
70,000 employees



Presence in  
37 countries



Ashok Leyland-  
flagship company



# Vision Statement



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





# Ashok Leyland's journey

1948



Started on  
7th Sep

1950



Ashok Motors &  
Leyland UK  
collaborate

1967



India's first  
double decker

1970



Vehicles for  
Indian Army

1987



Acquires jointly with  
Iveco majority stake  
in Ashok Leyland

1993



First auto co.  
to receive  
ISO 9002

2010



Pant Nagar  
begins operations

2013



Neptune engine  
launched

2013



Boss  
ICV launched

2014



Captain trucks  
launched

2016



India's first  
electric vehicle  
launched

2016



India's first Euro  
6 truck

2016

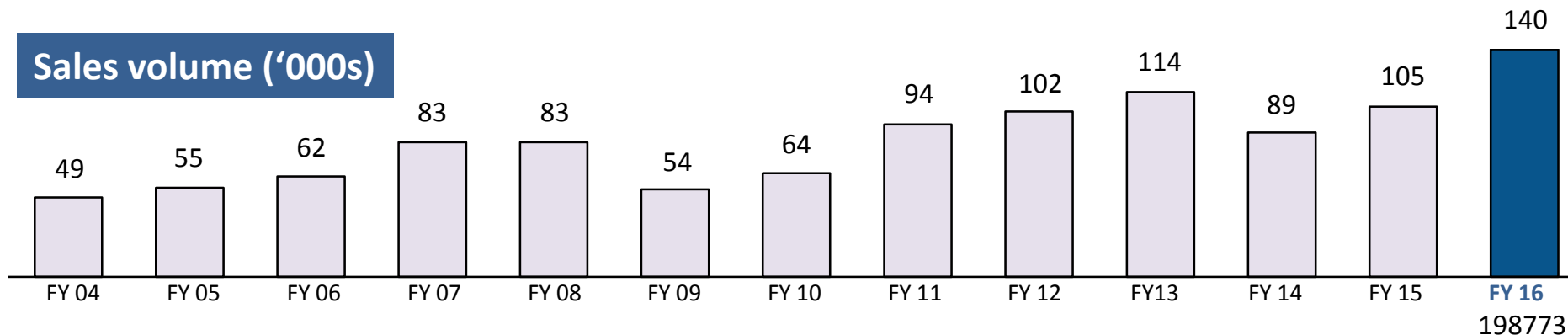


India's first  
rollover  
compliant school  
bus - Sunshine

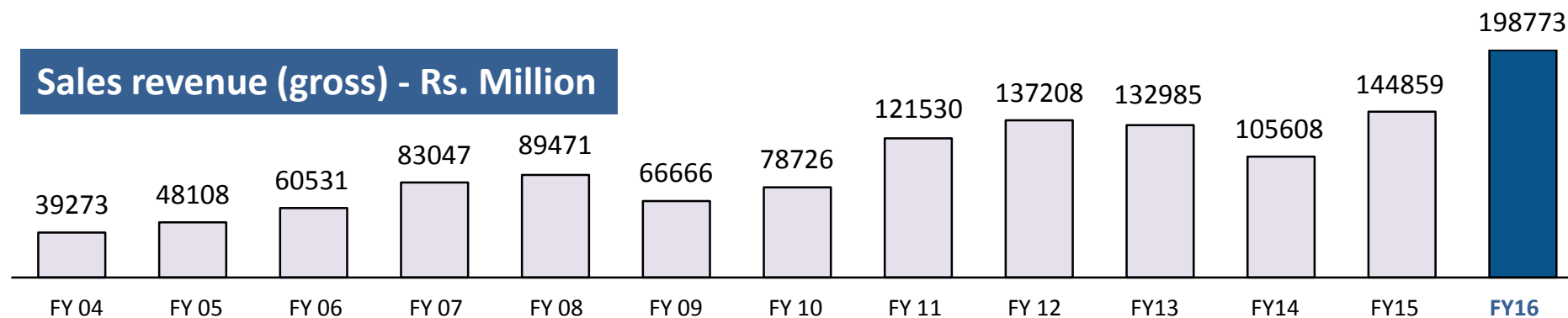


# Profitable since inception

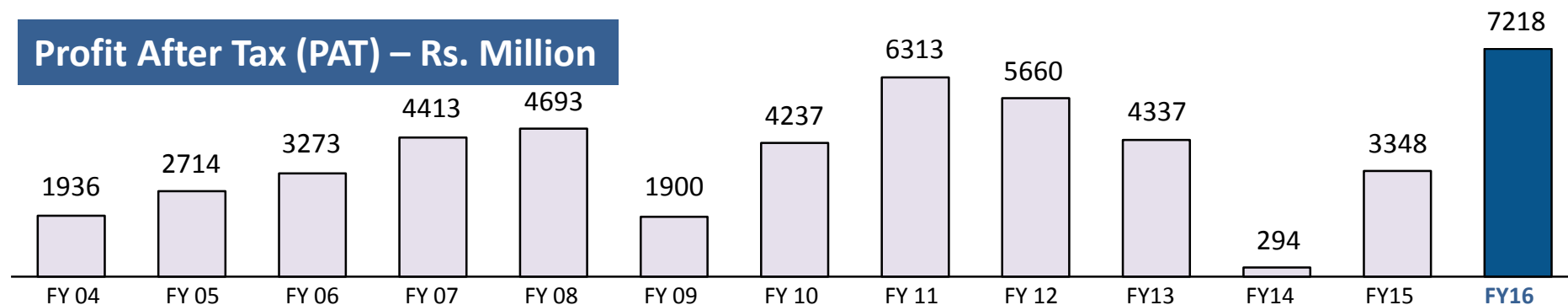
## Sales volume ('000s)



## Sales revenue (gross) - Rs. Million

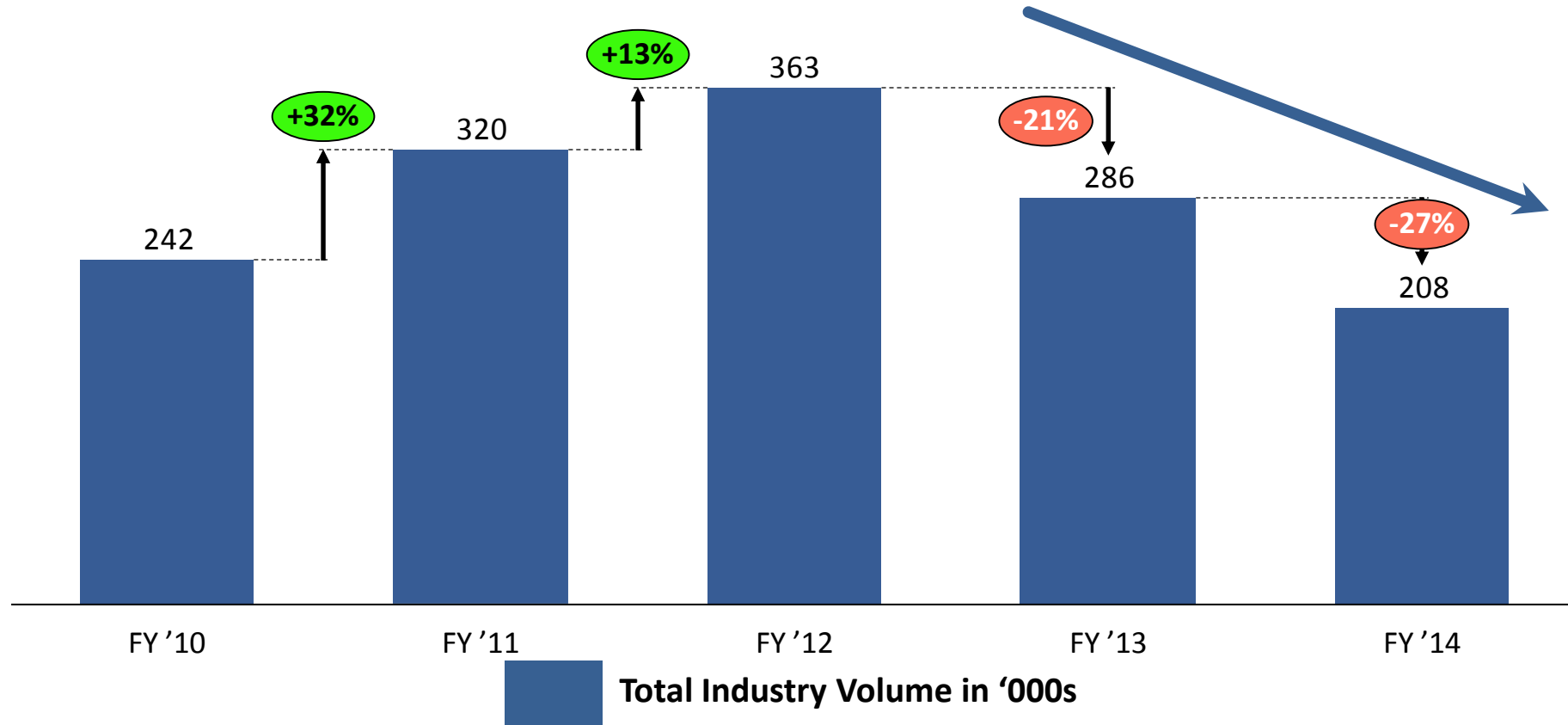


## Profit After Tax (PAT) – Rs. Million



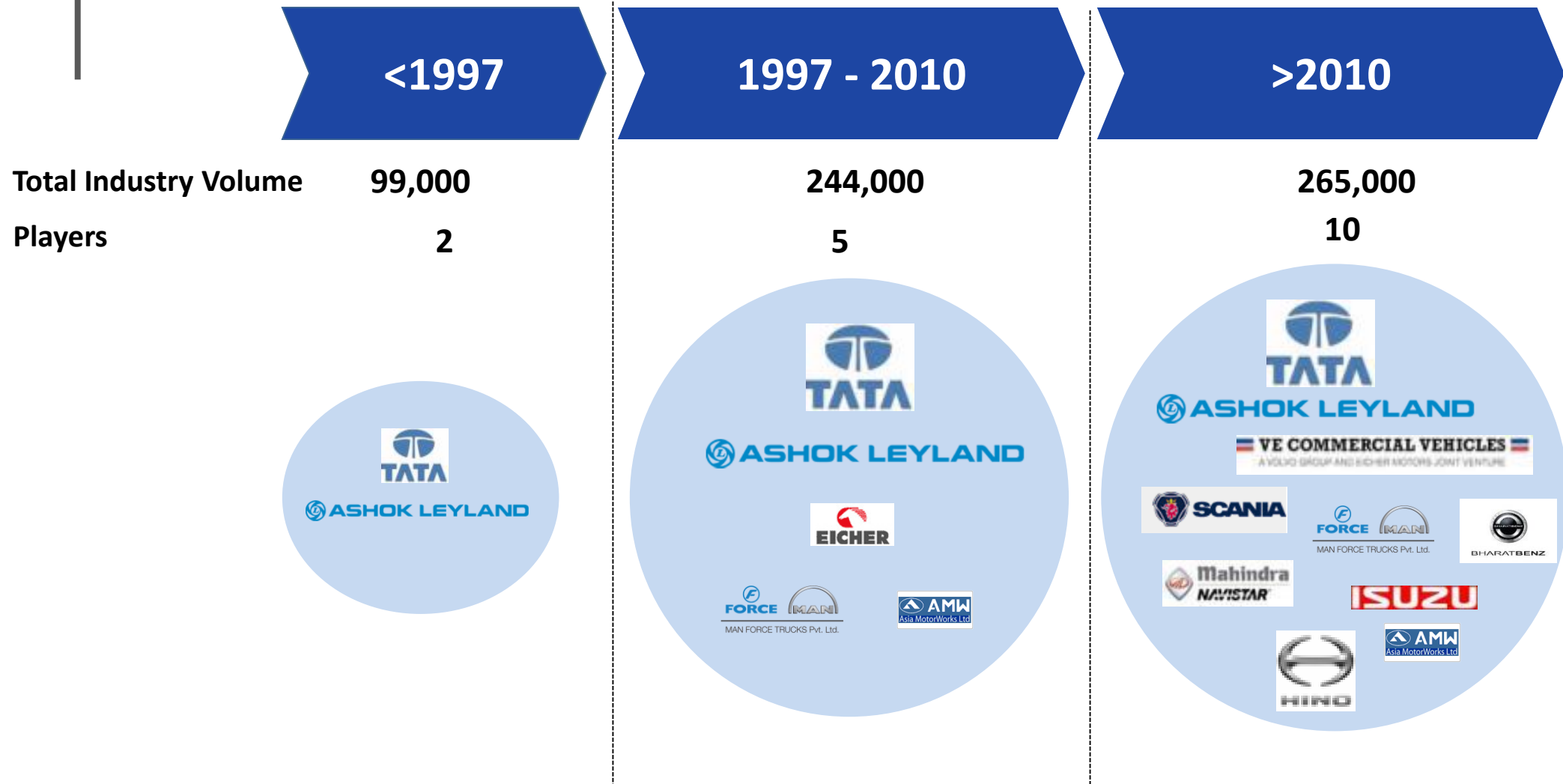


# Challenge 2012-14 - Industry collapsed





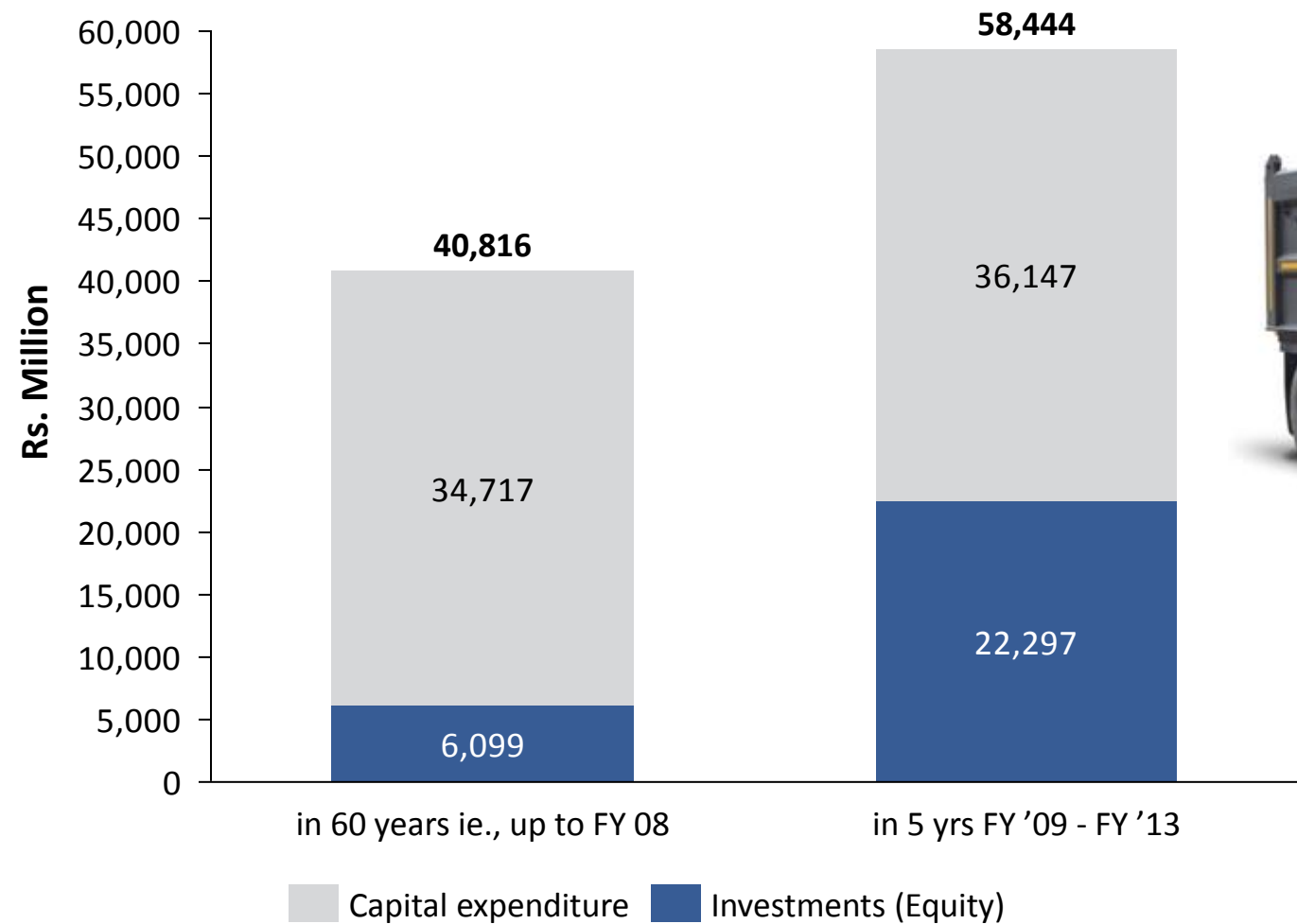
# Challenge 2012-14 - New competitors arrived





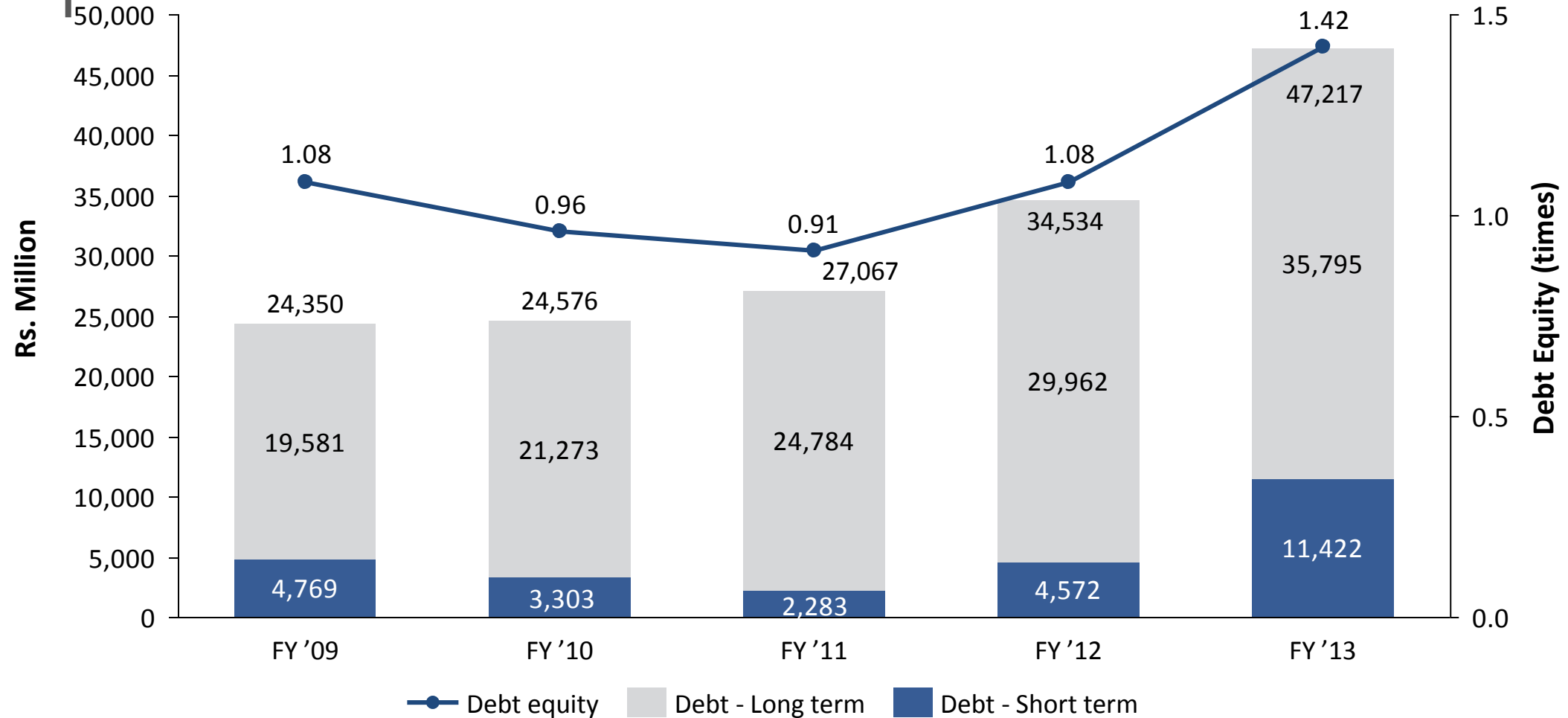


# Challenge 2012-14 - High investments leading to high breakeven





# Challenge 2012-14 - Huge debt





## Three overarching goals

To be the  
**No. 1  
Commercial  
Vehicle maker  
in India**

by becoming No. 1  
in M&HCV, No. 2 in  
LCV and No. 1 in  
Defence

**Grow acyclical  
business**

**2:1 – Domestic  
to International**



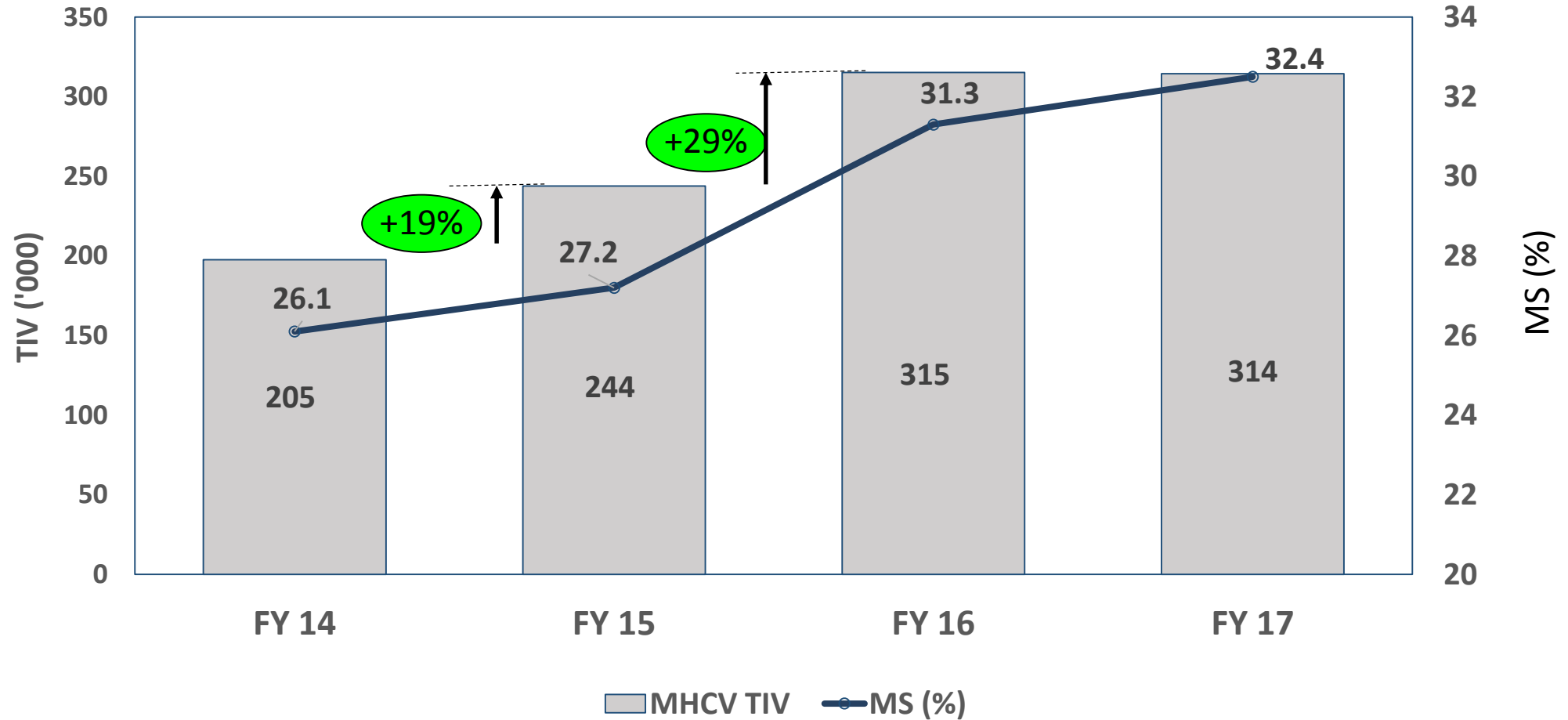
# Three overarching goals

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Defence



# Glorious year for AL – Continued our growth spree





# Innovative products launched...

## Truck



Captain Eco cabin -Tipper and Haulage variants



**GURU** launched in Jan' 17



10x2 and 8x2 Coal Tipper.

## Bus



Sunshine - June 16



Circuit EV – Oct 16



Oyster– Dec 16





# We engaged the customers differently

## Truck



Foot fall of 2500+ customers



Taking Customer video testimonials.  
56 completed across  
Hub-Application-Segments



1150+ customers visited  
our manufacturing plants  
and R&D center.

## Bus



40+ Plant visits



Electric vehicle demo  
across the country



Various programs  
covered 284 schools



# GURU – From board to road in 18 months







# GURU – wide range of customer applications



GC 2017 | 20-23rd April  
GC April 2017



sunshine

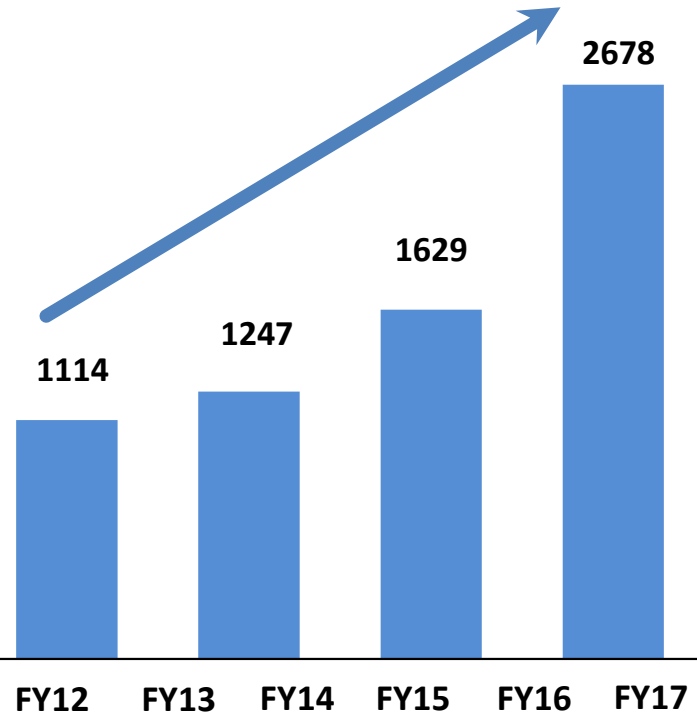


School Bus of the year





# Significant growth in Network using innovative formats



Dealership 3S



Dealership 1S



ALASC



SASSY



WOW



MMG



Quick Service



# Pantnagar Plant won the Deming Award

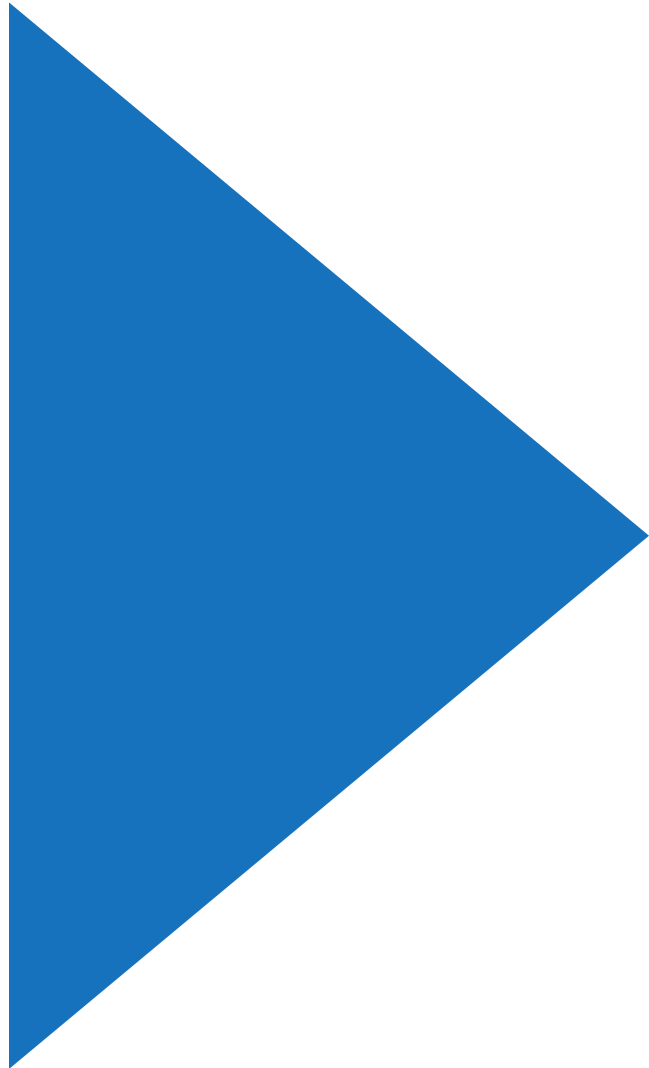


World's first Commercial Vehicle manufacturer  
To win the prestigious Deming Prize





## Three overarching goals



**Grow acyclical  
business**

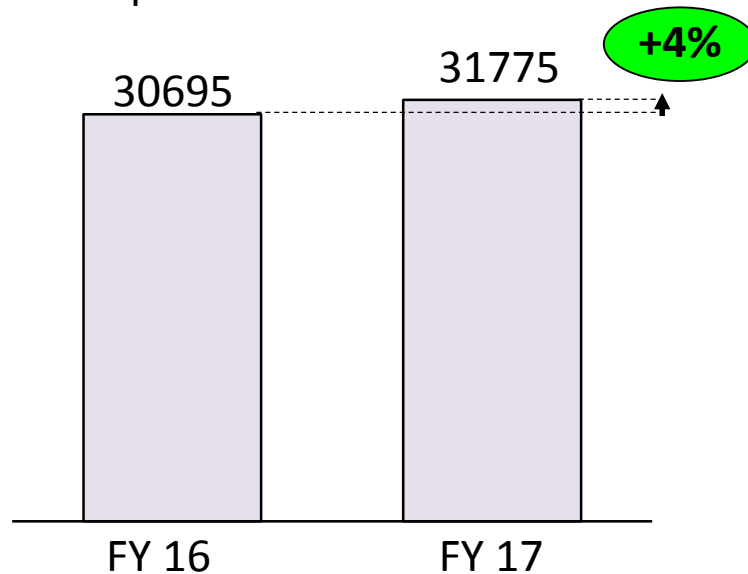




# LCV & PSB volumes increased



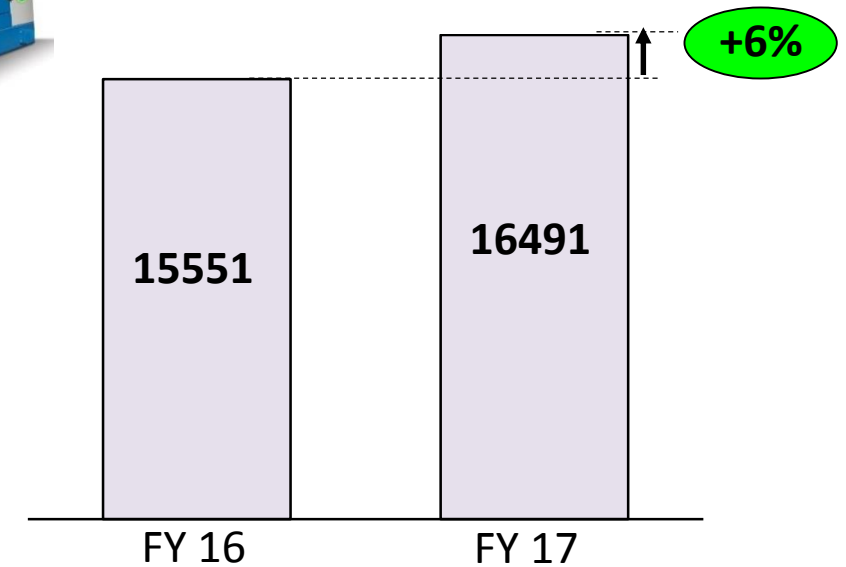
4% growth with single product for the first 3 quarters and slowdown in exports



- Retained our MS at 15%
- Best in Industry - SMS of 54% and Paid Service retention of 66%



PSB volumes up by 6%, aided by new product variants and customers



- Entry in to Global automotive Engine program
- Range expansion - Small & High Horse Power engines



# Expanding LCV product range...

0-3.5T  
(SCVs)



Higher GVW

3.5-7.5T



Power options

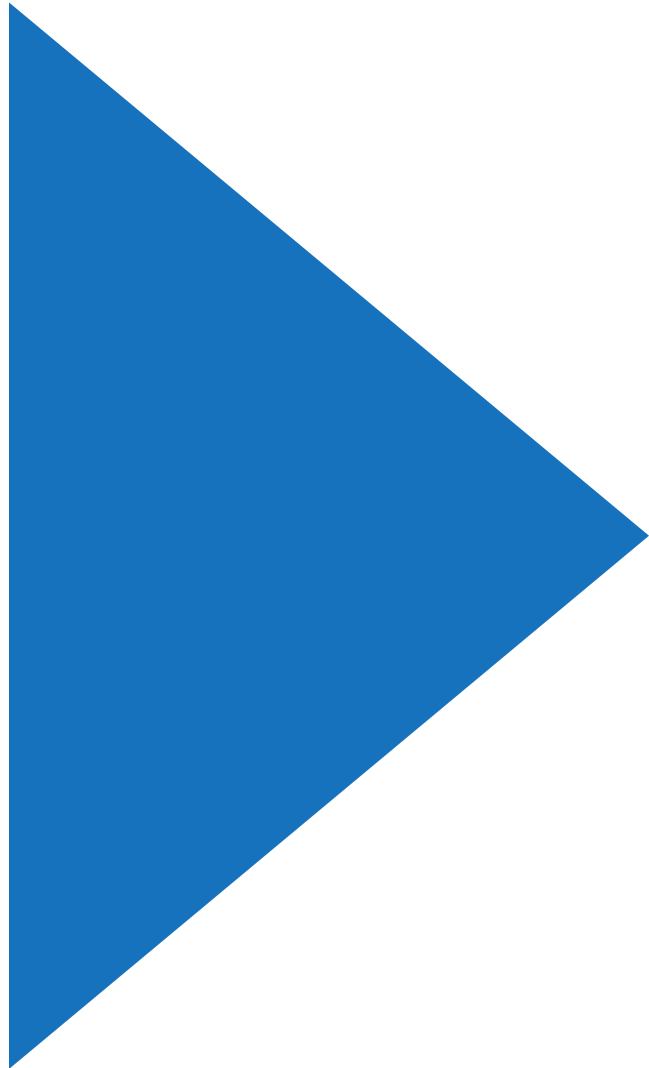
LCV  
Passenger



Seating options



# Three overarching goals



**2:1 – Domestic  
to International**



# Ashok Leyland - IO Dubai HQ inauguration



**An Operations, Manufacturing, Product Management; and Process HO**



# Organizing the eco system

## Sequencing product launch- country wise



## Building a sustainable Eco-system

**Build Brand**



**Enhance Network**



**Retail Financing**



**Processes**







# We achieved efficiency in RAK





Congratulations Bangladesh..5000 units achieved for the first time !!





# Oyster – Made in GCC, for the world







# Handing over of 475 Ashok Leyland buses to President of Senegal, H.E. Macky Sall on 07.10.2016





The Future Beckons...



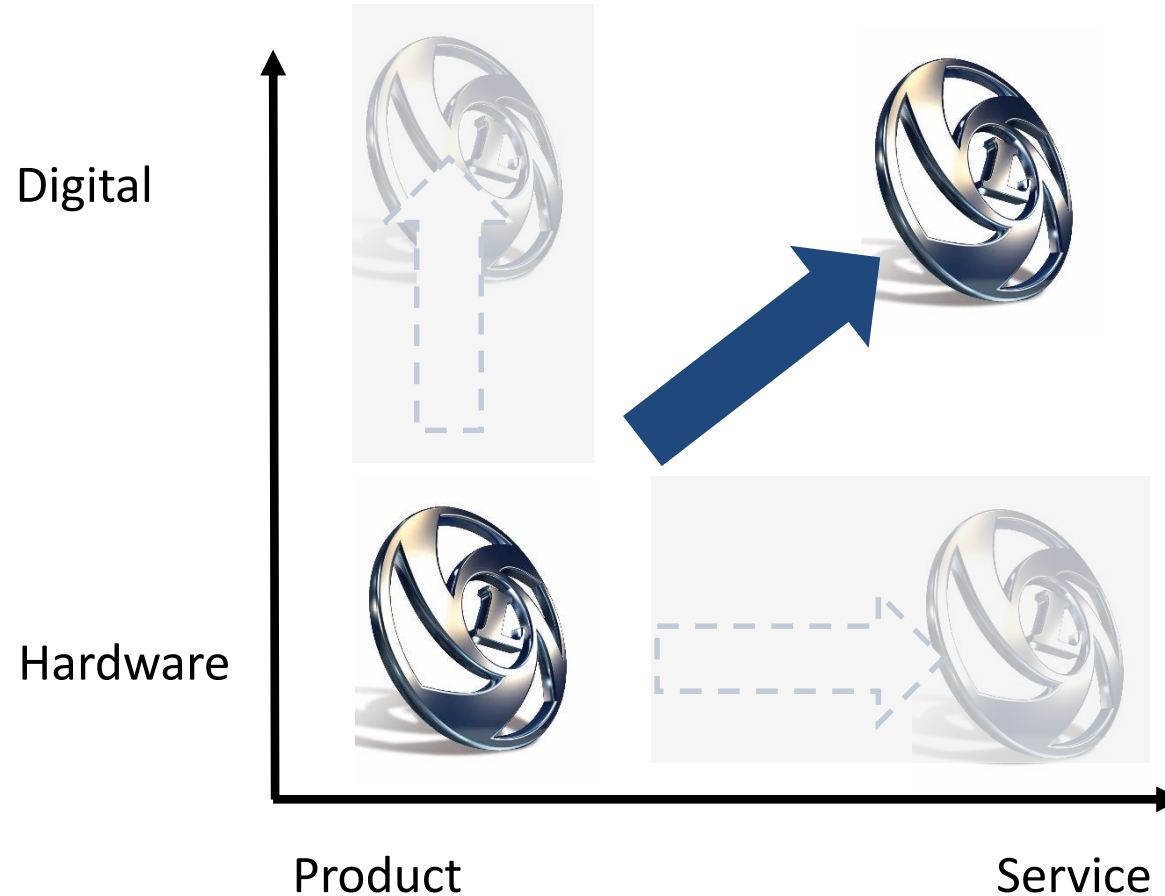
**Lets Conquer New Frontiers**



# Environment is changing



- Moving from world class products to services and solutions
- Moving from innovative trucks to digitally enabled







# BSIV



- ✓ Upto 10% better KMPL than BSIII
- ✓ BSIV compliant upto 400 HP
- ✓ No POC
- ✓ No need for additional electronics
- ✓ No additional sensors
- ✓ Lower maintenance costs
- ✓ Lighter in weight than SCR
- ✓ Better payload than SCR



## Service – Key differentiator in Sales



- 86% Response and 96% Restoration. **Best in industry.**



- Industry first en route *PIT STOP* service support



- International operations support cell

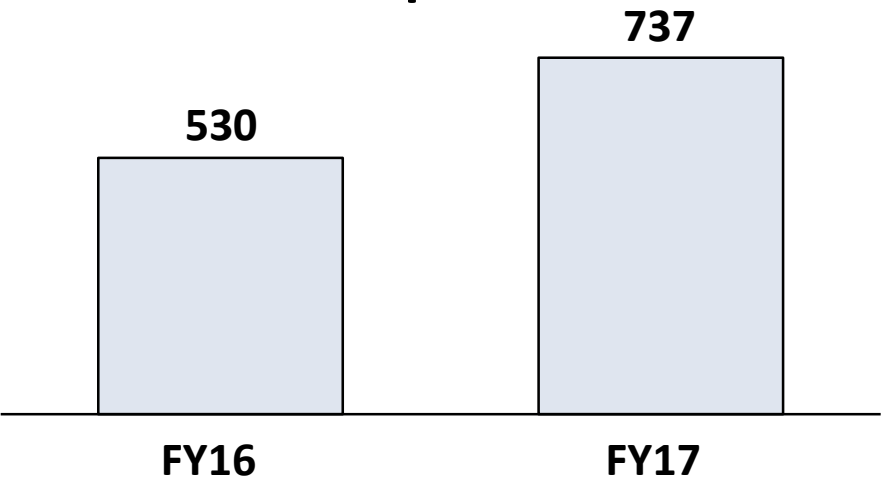


# Dealership revenue up by 39% and improvement in customer satisfaction

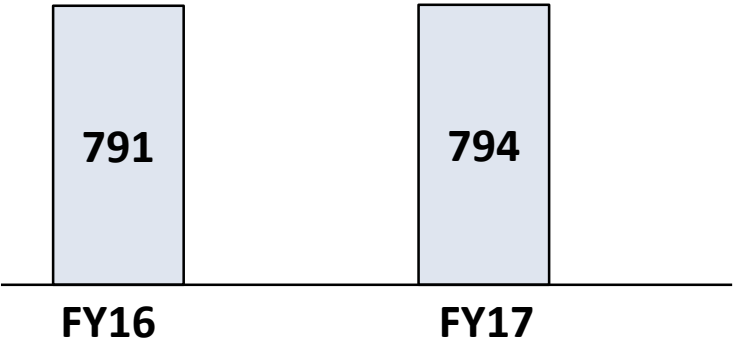


Dealership Revenue

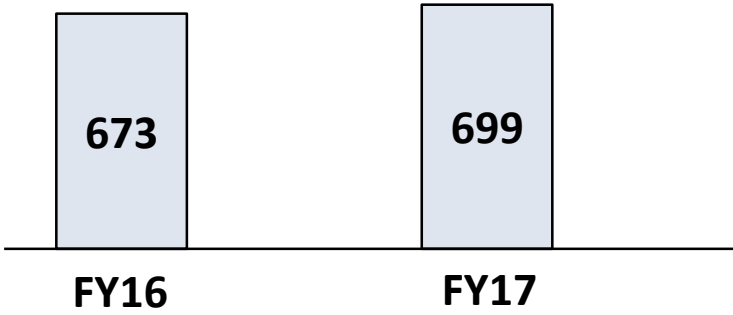
(Rs. Crore)



Sales satisfaction



Service satisfaction





## R & D – one of Asia's best

- Fully equipped – state of the art R & D centre in Chennai
- Capable of styling, design, proto build and testing
- State of the art equipment  
6 poster chassis dynamometer, complete test track with torture track and engine testing facilities.



Articulated test track



6 Poster test rig



Transient cycle engine dyno



Fully automatic dyno controllers



Hydraulic/eddy current





# Testing & validation - vehicle Level

## SIX POSTER TESTING



**PROLOGUE**

Six Poster Road Simulation Laboratory was commissioned on April 2006 as a part of Technical centre - an exclusive Product Development hub for Ashok Leyland. This laboratory, located in Chennai, is a unique test facility that can simulate any type of road terrain and test the structural durability of vehicles of up to 40 tons GVW. With the Road simulator it is possible to conduct tests using various nearly identical road surfaces with exceptional accuracy and repeatability.



**NABL**  
CERTIFIED  
LABORATORY  
SINCE 2008

TEST SYSTEM	KEY APPLICATIONS	NABL ACCREDITATION	SETUP - ACQUIRE	ANALYZE - EDIT	SIMULATE - TEST
The lab is equipped with a set of constant flow, variable pressure pumps and a state-of-the-art controller which can operate six servo-hydraulic actuators all supplied by MTS-USA, capable of doing more than simulating the roughest terrains in India.	Versatility is the key feature of the Road Simulator. Its applications include: •Structural durability •Ride comfort •Articulation up to 12° •Full vehicle running mode analysis •Suspension response •Vibration frequency mapping	The lab is the only test facility of its kind in India to be accredited for ISO/IEC 17025:2005 by National Accreditation Board for Testing and Calibration Laboratories (NABL). The lab meets the international standards in maintaining a strong management system and producing accurate results with high percentile of repeatability, reproducibility & maintains confidentiality.	Data Acquisition System from IMC - Germany, is used for road load data acquisition. Axle acceleration, displacement and strain at critical location are measured.  Features: •It accommodates a maximum of 128 channels with GPS channel. •It can operate at a maximum of 80°C & up to 2 km altitude	Data Editing & Analysis are done using RPC Pro, IMC FAMOS and mCode Glyph works software. Data is analysed using different techniques like Damage Analysis, Component Life Estimation, Strain or Acceleration based time compression, Statistical, Spectrum and Duty Cycle Analysis to filter out the Non-Damaging data (Plain road data).	Road simulator rig is setup for the vehicle wheel base and wheel track and the vehicle is loaded on the rig. The Flex Test GT (FTGT) Controller has 18 control channels, 30 Analog Inputs, 6 Analog outputs and 32 Digital I/O channels to simulate the road profiles. The correlation achieved between the response and the desired signal is more than 90%. The drive files to the actuators can be sequenced in case of multi-track testing to any number of repeats.

CAPABILITY	ACTUATORS
No of Wheels Upto 8 Wheeled vehicle Max Load 40 ton GVW Wheel base 1.4 m to 9.5 m Wheel Track 1.3 m to 2.5 m Seismic block 1200 Ton concrete block	Front Capacity 150 KN Quantity 2 Nos Stroke 300 mm Servo valve 3- Stage Electrohydraulic Rear Capacity 214 KN Quantity 4 Nos Stroke 300 mm

HYDRAULIC POWER UNIT	CONTROLLER
Quantity 4 units with 6 pumps each Model MTS Silent Flow Oil Mobil DTE25 Capacity 7600 lts Operating Pressure 3000 psi max. Max Flow Rate 100 lpm each (Total- 2400 lpm)	Model Flex Test GT Control Channels 18 Analog Input channels 30 channels



**NABL**  
National Accreditation Board for  
Testing and Calibration Laboratories  
CERTIFICATION NO. ACC/1001/2015  
ISO/IEC 17025:2005  
In Mechanical and Electrical Engineering  
SIX POSTER  
Road Simulation Laboratory  
Ashok Leyland Limited  
Chennai, India  
NABL Logo





# Testing & validation– component level

## Frontal Impact Test







# Testing and validation – vehicle level

Clutch drop



Water wading



Grade ability



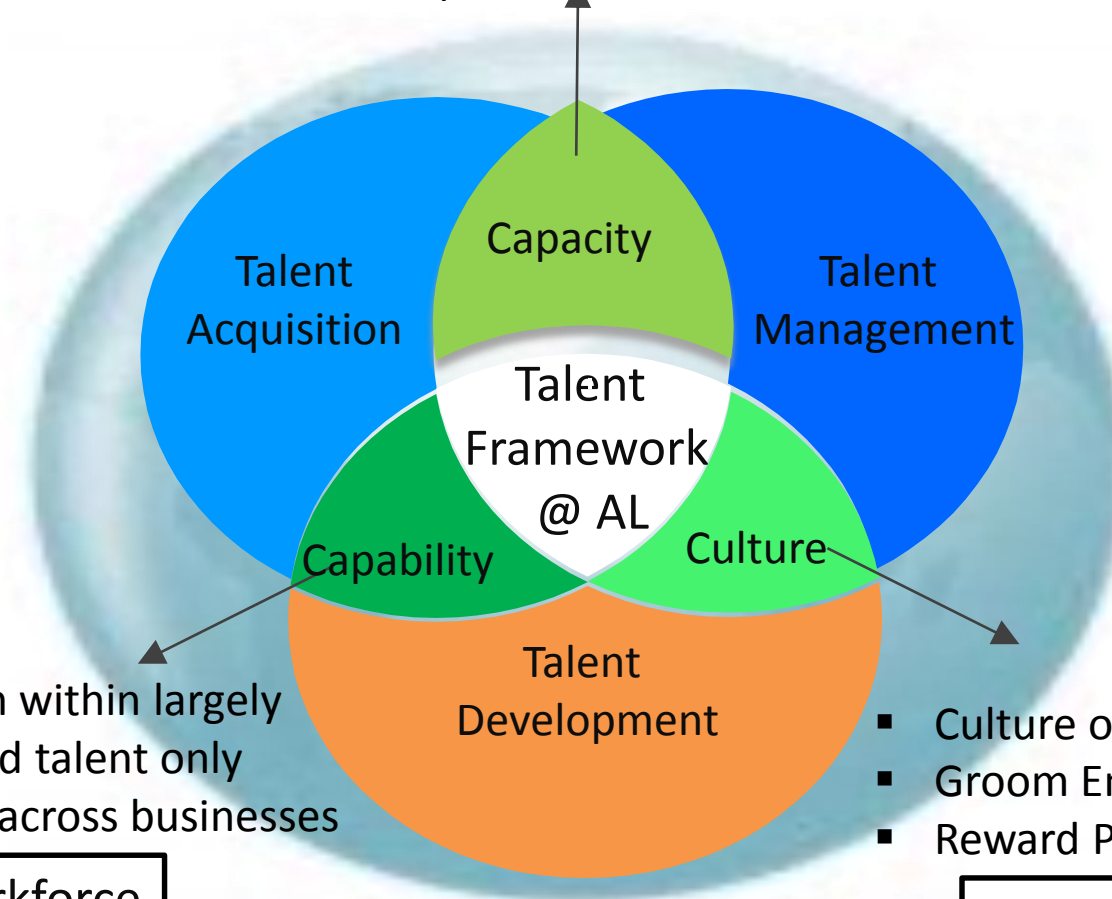


# HR Strategy to achieve HR Vision

Good  
to Great!

- Onboard diverse and young talent
- Create performance differentiators for global workforce
- Build Leadership Succession

AGILE Workforce



- Build leaders from within largely
- Acquire specialized talent only
- Increase capacity across businesses

ENABLED Workforce

- Culture of High Performance
- Groom Entrepreneurial Leaders
- Reward Performance

EMPOWERED Workforce



# Blessings scheme (Ashirwad Yojna): Pant Nagar





# Diversity and inclusion







## Giving back to society(CSR)

Ashok Leyland's CSR activity '**Road to School**' aims to improve quality of education, nutrition and health of school children. Covers about 15000 children in 108.

'**Ashirwad Yojana**' started in 2010. Recently inducted the first batch of 135 youth who have successfully completed the 4-year Diploma in Manufacturing Engineering Program.

Thank you