Founded in 1948 as Ashok Motors and became Ashok Leyland in 1955

Principal stakeholder since 1987

THE HINDUJA GROUP
VISION FOR TOMORROW - VALUES FOR ALL TIME

Trading   Project Development   Media   IT/ITES   Hydrocarbon, Chemicals & Agri Business

Automotive   Real Estate   Banking & Finance   Healthcare   Energy

Investments in Europe since 1970s, with widespread interests in India

Active in over 100 countries, 5 continents

100,000 + employees

Hinduja Group
Guiding Principles

"**My Dharma is to work so I can give**"

Shri. Parmanand Deepchand Hinduja
Founder, Hinduja Group. 1900-1971

- ▶ **Work to Give**
- ▶ **Word is a Bond**
- ▶ **Act Local. Think Global.**
- ▶ **Partnership for Growth**
- ▶ **Advance Fearlessly**

World's largest supplier of defence logistics vehicles.

4th largest manufacturer of buses in the World.

10th largest manufacturer of trucks globally.

Business Vision

To be a
Top 10
Global CV Player
creating reliable and differentiated
products and solutions,
while delivering outstanding
stakeholder value

Brand Positioning

Ashok Leyland is an **International Mobility Company** that designs, builds and markets commercial vehicles and after market solutions, combining **a passion for engineering** with **integrity** in its products and practices.

It is driven by the belief that **its greatest success lies in the success of its stakeholders.**

Mission

Enriching lives through mobility

- **Empowering our people** through a culture of joy, appreciation and mutual respect
- **Increasing the profitability** of our partners
- **Instilling pride** in the communities we serve

Values

- Passion
- Partnership for Growth
- Uncompromising Integrity
- Thoughtful Innovation

Our proposition is delivered through our operating principles

Performance

Speed

Innovation

Customer-focus

Quality

$4.2 bn in revenue

Listed on Bombay Stock Exchange, National Stock Exchange and London Stock Exchange

No of Vehicles

	2011-12	2012-13	2013-14	2014-15	2015-16	2017-18	2018-19
Bus	21,033	19,002	14,951	13,151	19,586	13,708	16,323
Truck	60,512	51,914	36,867	53,291	79,223	10,2826	11,5613

■ Truck   ■ Bus

A HISTORY OF INDUSTRY FIRSTS

1967
Double decker buses

1976
Front door, front engine bus

1978
Rear engine bus

1980
13 tonne truck

1982
Vestibule bus

1997
CNG bus

2008
Low floor bus

2012
Single step bus

A HISTORY OF INDUSTRY FIRSTS

2012
37 tonne haulage truck

2015
Zero emission electric bus

2016
Euro 6 Compliant Truck

2016
Electric bus

2016
Roll over compliant school bus

2017
iEGR launch

2018
Battery swap technology in the EV segment

First truck and bus company outside of Japan to win the Deming prize.

Pantnagar Plant

Hosur Unit II wins the Deming prize making it two in a row for Ashok Leyland

Installed worldwide capacity of 1,70,000 vehicles annually

Manufacturing facilities in India

Pantnagar

Alwar

Bhandara

Hosur   Ennore

5 targeted International clusters

Domestic Market

International Presence

SAARC

GCC

CIS

AFRICA

ASEAN

IN OUR 4ᵗʰ PHASE OF EVOLUTION

FIRST PHASE

1967 - 1986

Ownership and technology
support by British Leyland

SECOND PHASE

1987 - 2005

Hinduja Group + Iveco acquired
Ashok Leyland

THIRD PHASE

2006 - 2013

- Exit Iveco
- Diversification

FOURTH PHASE

2014 onwards

- Future-ready Platforms
- New Engine and Cab range

OUR FUTURE READY
TRUCK & BUS PLATFORMS

Full portfolio of future ready truck platforms
2.5T to 49T GVW

Dost
- Launched Sep '11
- 2.5T GVW

Partner
- Launched Jan '14
- 6-7.2T GVW

Boss
- Launched Sep '13
- 10-12T GVW

Captain
- First product launched Jan '14 (25T tipper)
- Suitable for tippers, multi-axle trucks and tractor trailers (up to 49T GVW)

Guru
- Launched in Jan'17
- 10T- 30T GVW

Bus platforms
16 to 80 seats

Mitr

- 16-32 seats

Metrocity

- Urban transit midibus developed by Optare

Jan Bus

- Innovative low floor (Entry+1 step) front engine bus
- 4 patents applied covering 18 unique features

Metrodecker

- Monocoque double-decker developed by Optare

Versa EV

- Electric vehicle developed on Optare Versa platform
- **SMMT 2012 Award** for automotive innovation

Sunshine

- Safe School Bus with RFID
- Antimicrobial interiors

OUR FUTURE READY
DEFENCE VEHICLE PLATFORMS

Platforms and capabilities for growth in defence business

Products

Stallion 4X4

Stallion 6X6

Super Stallion 6X6

Super Stallion 8X8

Product range

10X10

Super Stallion 6X6
New Cab

FAT 6x6

Stallion 4x4

Engines from 40 hp - 400 hp

P15

1.5-litre

40 - 75 hp

100 - 180 Nm

Euro-3/4/5#

CNG Option

ZD30*

3-litre

120 - 140 hp

320 Nm

Euro-3/4/5#

CNG-In Plan

H-Series

3.8 & 5.8-litre

120 – 230 hp

380 – 800 Nm

Euro-3/4

CNG Option

N-Series

5.3 & 8-litre

190 – 360 hp

600 – 1400 Nm

Euro-3 to Euro-6#

CNG-In Plan

#Euro-5/6 capability

OUR
PROCESSES

OUR MANUFACTURING,
TESTING & RD CAPABILITIES

Growth in manufacturing capability

All new integrated plant,
capacity of 50,000 units

Pantnagar Plant

VVC R&D Centre

Substantial investments in design capabilities (R&D)

Advanced simulation capabilities

State-of-the-art modeling and CAE facilities
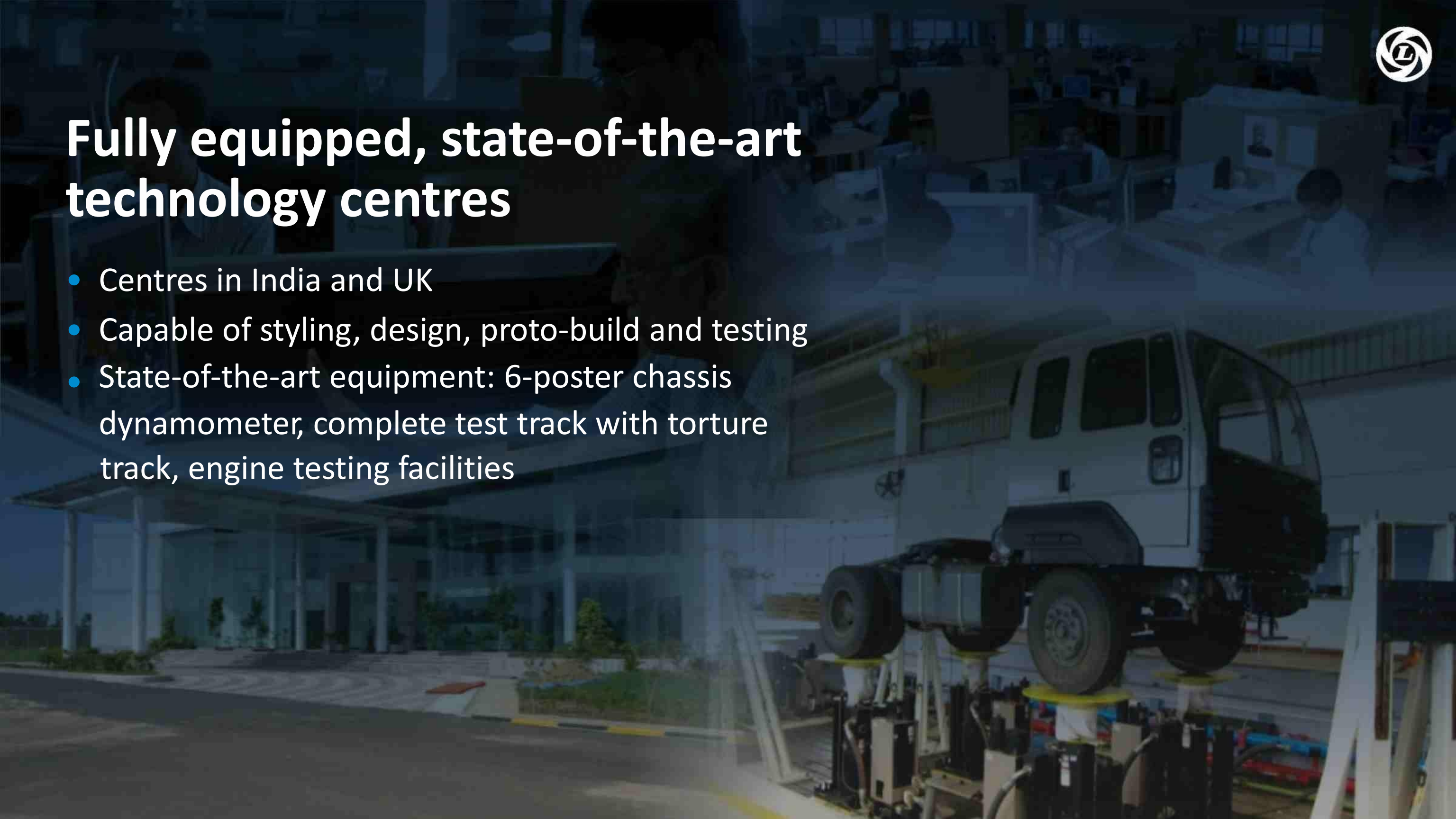
850 strong R&D Team

Advanced testing facilities

Fully equipped, state-of-the-art technology centres

- Centres in India and UK
- Capable of styling, design, proto-build and testing
- State-of-the-art equipment: 6-poster chassis dynamometer, complete test track with torture track, engine testing facilities

State-of-the-art physical testing facilities

Transient cycle engine Dyno

Fully automatic Dyno controllers

Hydraulic/ Eddy Current

Articulation test tracks

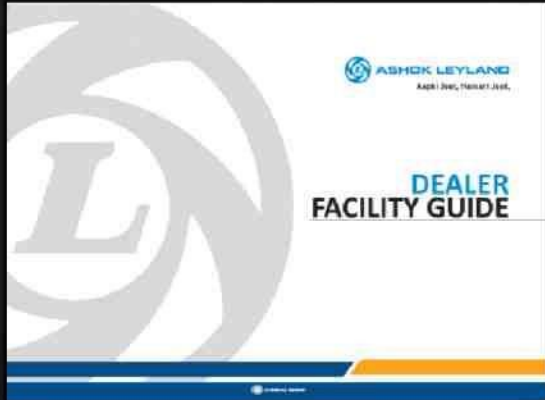High speed tracks

6 post chassis dynamometer

OUR PARTNER
SUPPORT APPROACH

Standardised processes and innovative formats for network scale-up

Dealer facility guide

HLF services- in-house manpower company

Balanced Score card

Containerised workshops

Low cost showrooms

Contemporary, branded outlets innovative and efficient formats

Proven ability to support customers, and helping them establish their business model

- Complete operation and maintenance of buses
  for several clusters of Delhi Transport Corporation and Delhi Inter Modal Transport Service

- Collaborated with Governments to provide key local user needs, improve quality of life and economic efficiency within a clearly defined budget.
  - BRT Lagos Lite, Nigeria - 700 buses, 2008
  - Ministry of Transport, Angola, 1500 4X4 Buses, 2008-2012
  - Ghana Metro Mass Transit Ltd - 100 Buses, 2012
  - Tanzanian Peoples Defence Army - 773 Army Vehicles, 2013
  - Dakkar Dem Dikk, Senegal - 475 Buses, 2015
  - Kenya Defence Forces - 30 4X4 Ambulances, 2016

i-ALERT
Intelligent. Innovative. Intuitive

Backed by state-of-the-art technology, i-Alert is a pioneering product that helps you monitor vehicles round-the-clock using real time data analytics on geographical location. Unlike standard fleet management systems, i-alert provides valuable MIS on vehicle performance, predicts service requirements, helps you plan maintenance schedules for quick and efficient service at your service centers, ensures faster turnaround, and helps vehicles stay on-road longer.

Key highlights:

- Continuous exchange of information across channel, customer and company
- Vehicle prognosis to predict problems and arrive at important findings in case of a breakdown
- Dealers can offer proactive service support by tracking all Ashok Leyland vehicles
- Provides customers a live feed on performance parameters

KEY FEATURES

Truck with GPS location & condition monitoring

Vehicle vitals integrated with GPS device

Data transmission through GSM/GPRS

Data received by all servers

Customer fleet manager

Access to application via mobile app or web interface

Real-time vehicle analytics and condition monitoring

Workshop service reminders to fleet managers and related alerts to dealers

OUR NEXT WAVE OF
GROWTH

Ready for the next wave of growth

- Portfolio of businesses with **less cyclicality**
- Footprint in **five targeted international clusters**
- Range of **contemporary** products (2.5T-49T GVW, 16-80 seats) and **globally benchmarked** business processes
- World-class manufacturing facilities, for 170000 vehicles per annum

Business portfolio with reduced cyclicality

LCV

Dost

Partner

MiTR

Defence and Aftermarket business

LCV Business

Power Solutions Business

Defence Logistics

Aftermarket

Delivered through Innovative HR practices ...

- **Mission YEs – Powered by Youth**
- **Emerging Leader Programme (ELP)**
- **IMPROVE**
  - 11,000 new innovative ideas
  - 45% company participation

Proposed Diversity & Inclusion Agenda

OBJECTIVES:

- To increase women's participation in the workforce

- To make the environment more conducive for collaboration and diverse ways of working

- To create a framework for encouraging and capturing voice towards better engagement

Mentoring Training Coaching Engaging

Policy

- Extend the scope of **Maternity Policy**
- Introduce **Paternity Policy**
- Tie ups for **child care**

Network

- An **internal women's network** to help create a voice and set the foundation for engagement

Recruit

- Campaign to recruit **second career women**
- Creating **flexi roles** for them within the system

Champion

- An **honorary position** for a senior woman leader from industry to champion the movement and give time to employees

Giving back to society(CSR)

The Road to School is an educational initiative that addresses some of the critical issues related to primary and upper primary education. The vision of the Road to School Program is to "Provide holistic development opportunities focused on quality and inclusion leading to education as a Social Leveler". Road to School is a Global Program aligned with United Nations Global Sustainable Development Goals and to the National agenda of improving quality of education, improving health, nutrition, social and civic awareness amongst underprivileged children from Government Schools.

The initiative touches the lives of 54000 children across 715 schools in 5 districts- Hosur, Chennai, Namakkal, Salem and Sankagiri.

People, Planet and Profit for all stakeholders
especially our customers is at the core of
Ashok Leyland which resonates with our Philosophy of

AAPKI JEET
HAMARI JEET

THANK YOU