

**Mahindra**  
Rise.

## Automotive Sector

**Tigers**  
of all terrain



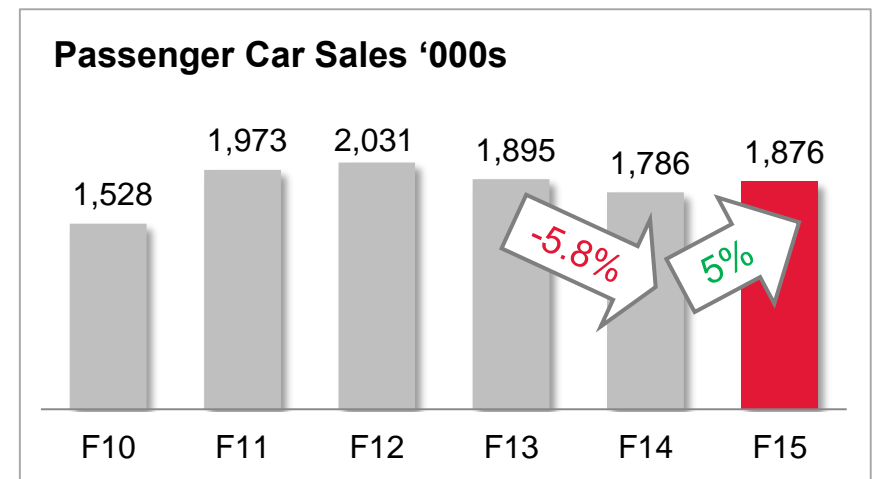
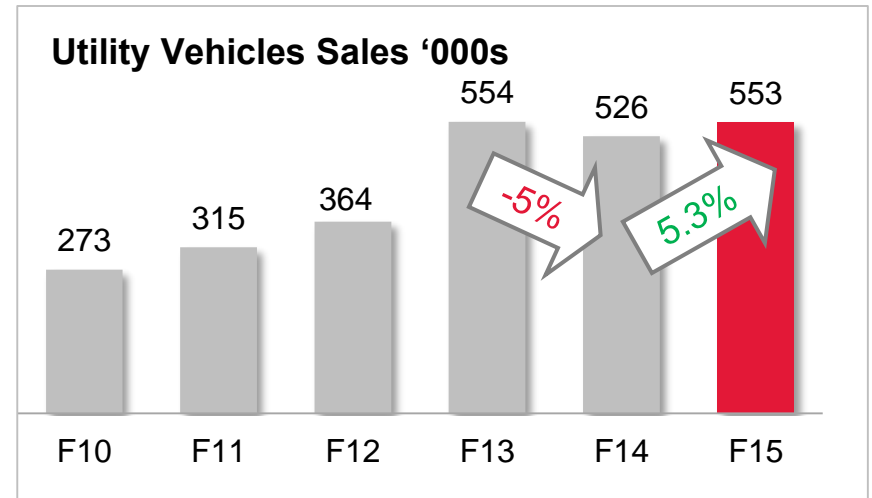
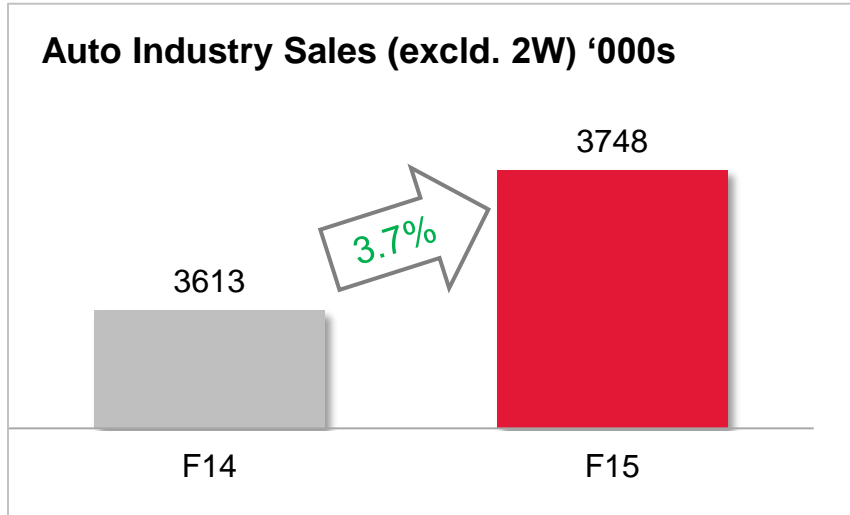
Pravin Shah

# F15 – A year of fragmented recovery

- Fragmented recovery in F15 from bottom of F14
- Only 6 of 17 OEMs have posted positive growth in PV
- CV segment (up to 3.5T) is still in red
- Turnaround of MHCV in H2

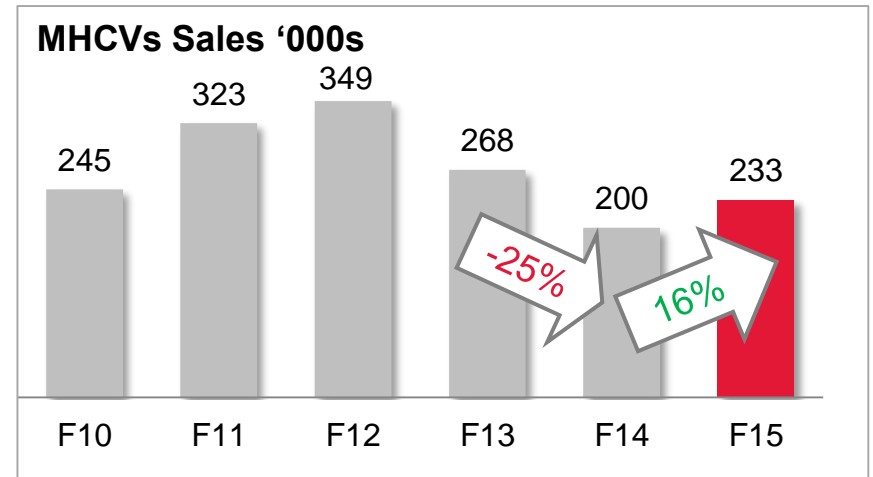
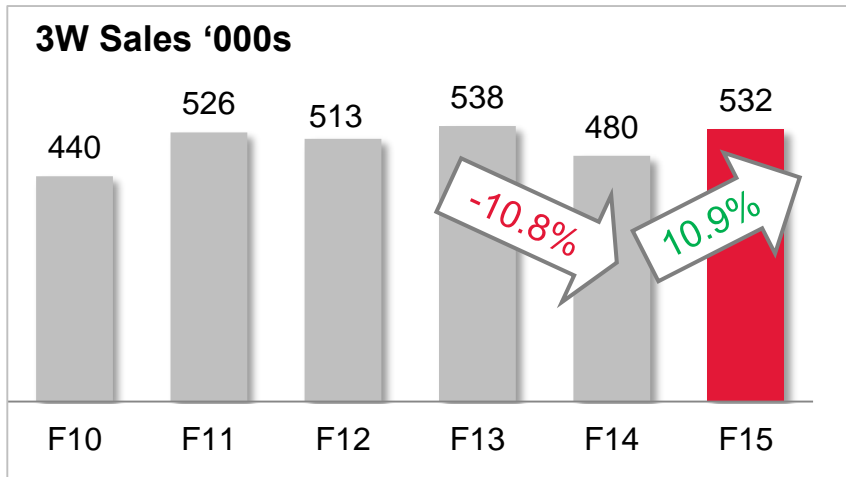
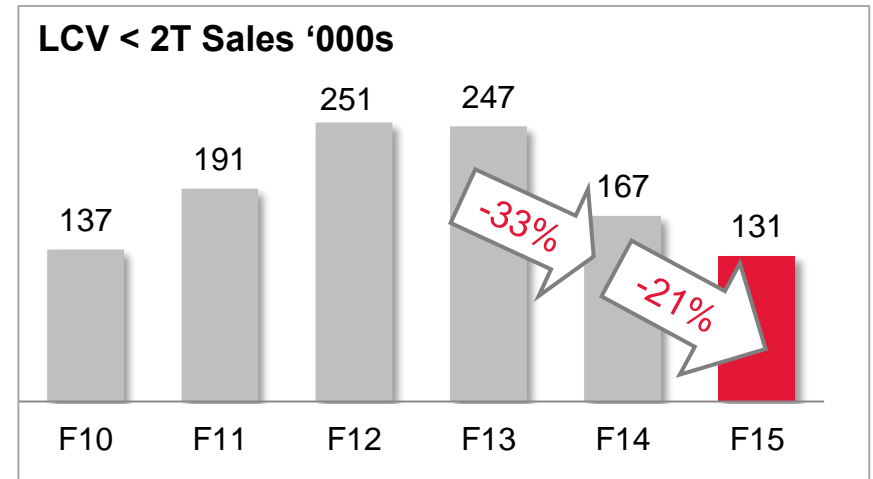
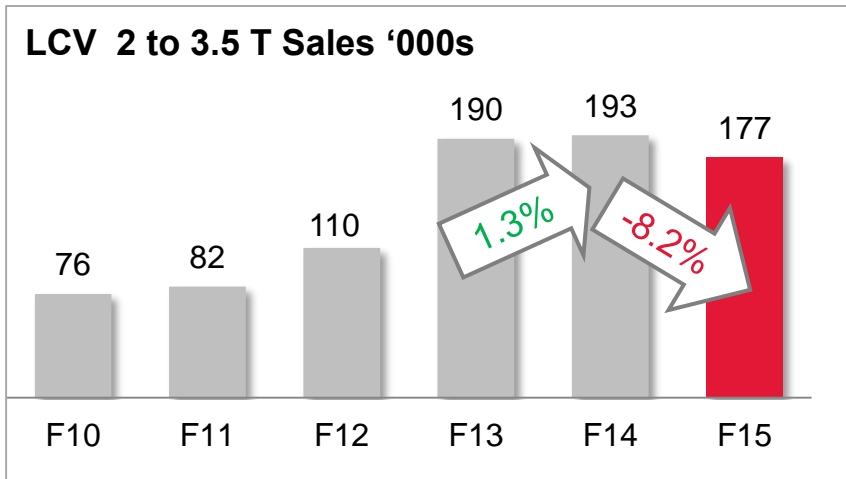
# The Year that was – Auto Industry

## Automotive (total) and Personal Vehicle Industry



# The Year that was – Auto Industry

## Commercial Vehicle Industry



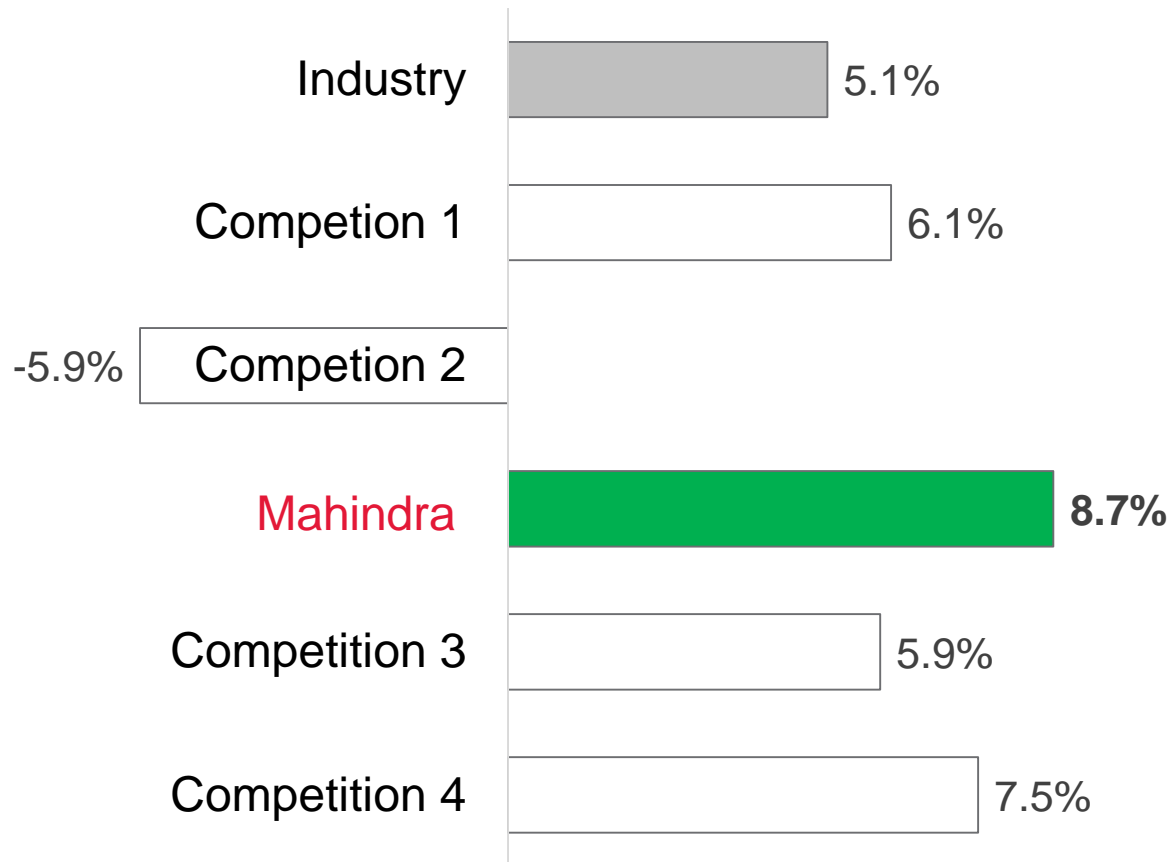
# F15 Domestic Market Performance

Gain in Pick Up & HCV market share

Segment	Industry		M&M	
	F15	Growth	F15	Growth
Utility Vehicles	553,699	5%	206,837	-5.7%
Cars	420,907	21.5%	3,184	-67.3%
Vans	171,395	-10.2%	13,947	-44.6%
LCV Goods < 2T GVW	131,455	-21.3%	15,255	-47.8%
LCV Goods 2 to 3.5T GVW	177,134	-8.2%	129,755	5.3%
3W	531,927	10.8%	56,764	-9.3%
<b>AD (Domestic) Total</b>	<b>1,986,517</b>	<b>4.4%</b>	<b>425,742</b>	<b>-9.3%</b>
LCV Passenger	44,816	4.7%	3,394	-7.5%
LCV Goods > 3.5T GVW	28,801	-2.2%	2,019	-8.5%
HCV Goods (>16.2T)	125,613	42.6%	3,499	53.1%
<b>AS (Domestic) Total</b>	<b>2,185,747</b>	<b>5.9%</b>	<b>434,654</b>	<b>-9.0%</b>
<b>Non Participating Segments</b>				
MHCV Passenger	36,837	-4.8%		
M+ICV Goods (7.5 to 16.2T)	70,305	-4.7%		
Cars (Non. Participating)	1,455,110	1.0%		
<b>AS (Dom.) Total</b>	<b>3,747,999</b>	<b>3.6%</b>	<b>434,654</b>	<b>-9.0%</b>

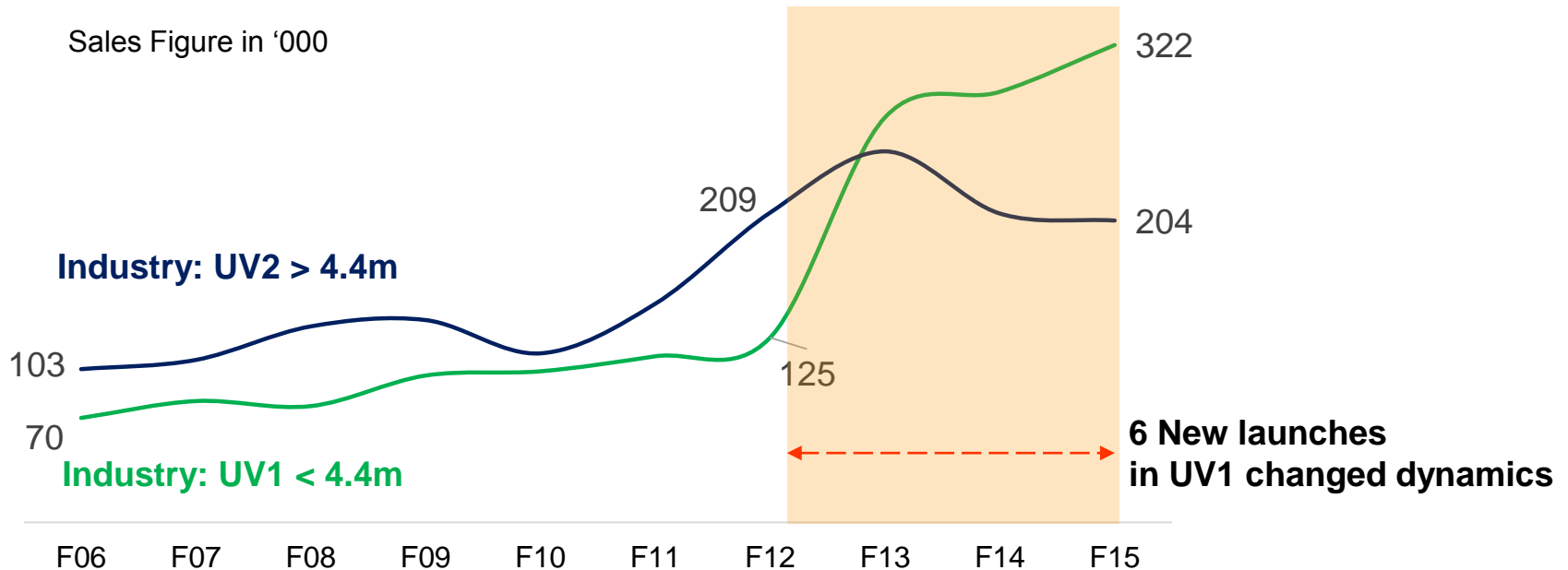
# 5 years (F10-F15) of Growth in India

## TOP 5 Players by Volumes



\* Sales fig. consist of PV, CV & 3W

# UV Market: Changing Dynamics



\* Numbers in '000

	Years	UV1	UV2	UV
Industry Growth	F12 - F15	37%	-1%	15%
M&M Growth	F12 - F15	1%	0%	1%
M&M Market Share	F12	74%	53%	55%
M&M Market Share	F15	30%	54%	37%

# Fantastic Four continues to fascinate

Growth over 2% (YoY)





# New Generation Scorpio

Crossed 50,000 Mark once again 4 years in a row, registers growth

Grows over 9% since launch on (Oct 14 – March 15) over same period last year



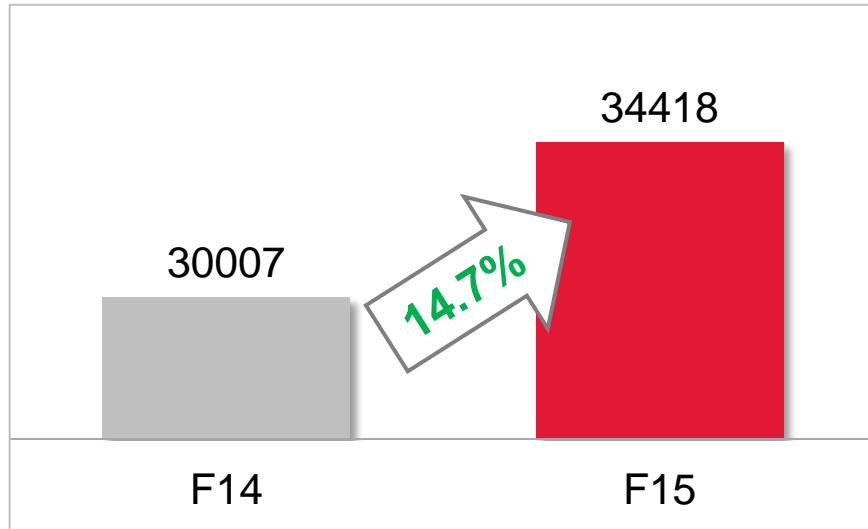
**IT ENJOYS WHAT OTHER SUVs DON'T.  
ADMIRATION. WINNER OF 8 PRESTIGIOUS AWARDS.**

**THE NEW GENERATION  
SCORPIO  
NOTHING ELSE WILL DO**

- SUV OF THE YEAR**  
Bloomberg TV Autocar India Awards 2015
- SUV OF THE YEAR**  
NDTV Car & Bike Awards 2015
- SUV/UV OF THE YEAR**  
ET Zigwheels Awards 2014
- PEOPLE'S SUV OF THE YEAR**  
TopGear Awards 2015
- SUV OF THE YEAR**  
Zignition Auto Awards 2015
- MOTORING SUV OF THE YEAR**  
Motoring World Awards 2015
- READER'S CHOICE AWARD - CAR**  
Car India and Bike India Awards 2015
- STORY BOARD COMMERCIAL OF THE YEAR**  
CNBC TV18 Overdrive Awards 2015

# XUV500 Turnaround

The fastest selling SUV\*



**XUV500 growth = 3X of UV Industry growth**

\* Fastest to achieve 100,000 sales among SUVs priced above Rs 10 Lakhs

# The New Age XUV500

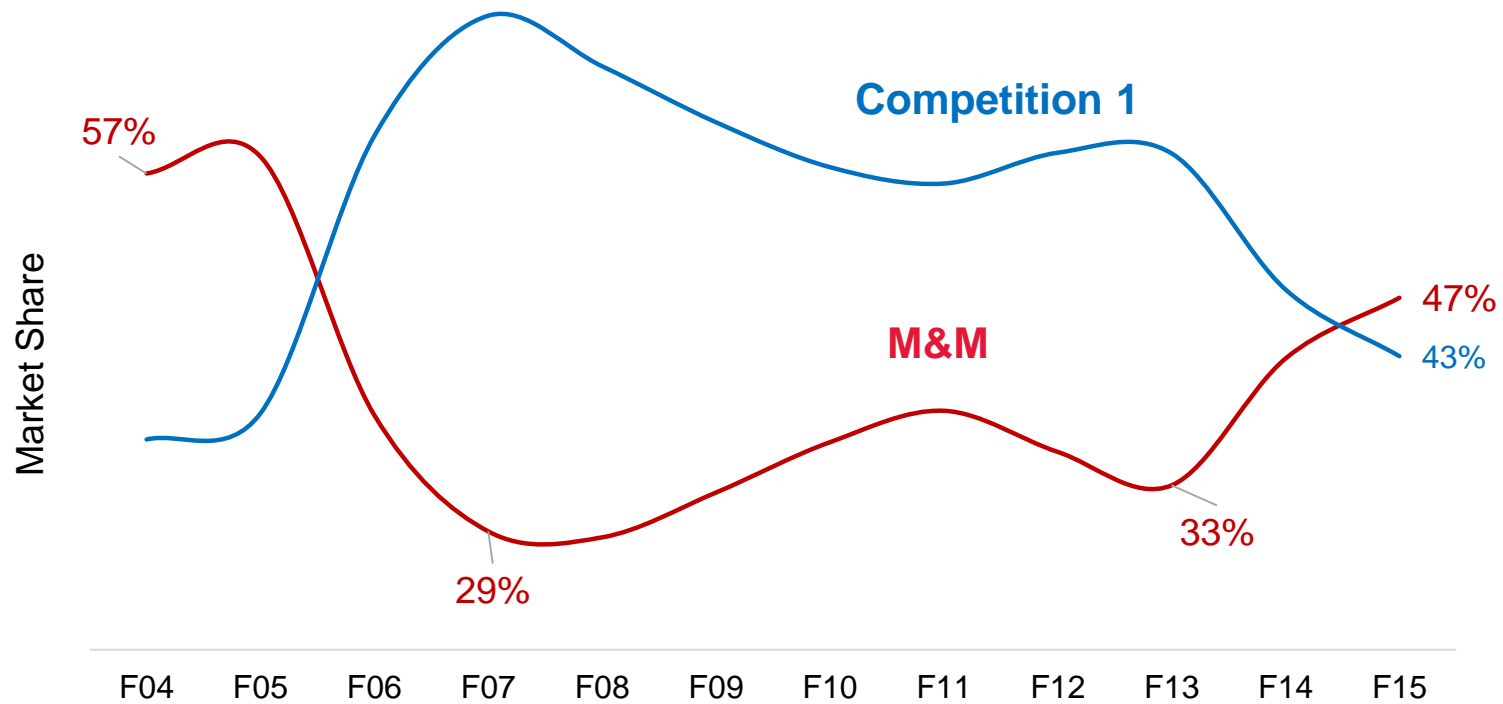


# Bolero

- No 1. selling SUV 9 years in a row
  - 1 Lakh+ Boleros sold 4<sup>th</sup> year in a row
  - 5<sup>th</sup> largest selling Passenger Vehicle (PV) brand in FY 15
- 



# M&M regains No. 1 position in LCV <3.5T



Segment de-grew: F15: -14% , F14: -17.6%

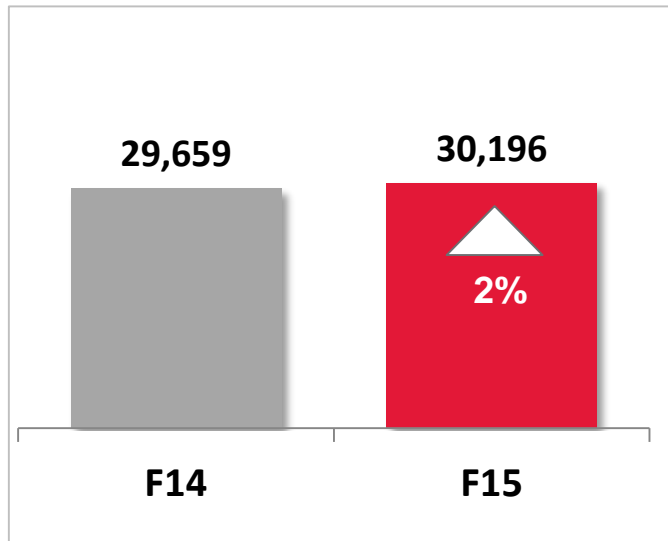
# Pick Up

## Highest ever market share

- M&M continue to rule the pick up segment with 73% market share
- Registered growth of more than 5% on Y-o-Y
- Crossed 1 Lakh mark 3 years in a row



# F15 Exports Performance

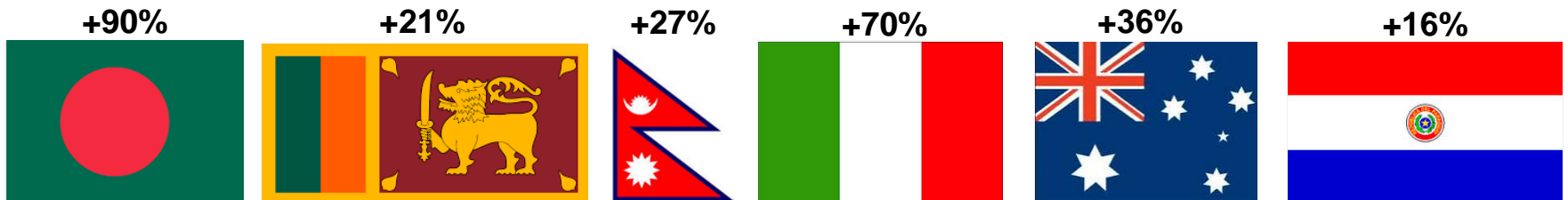


Highest ever market share in Srilanka, Nepal & Bangladesh

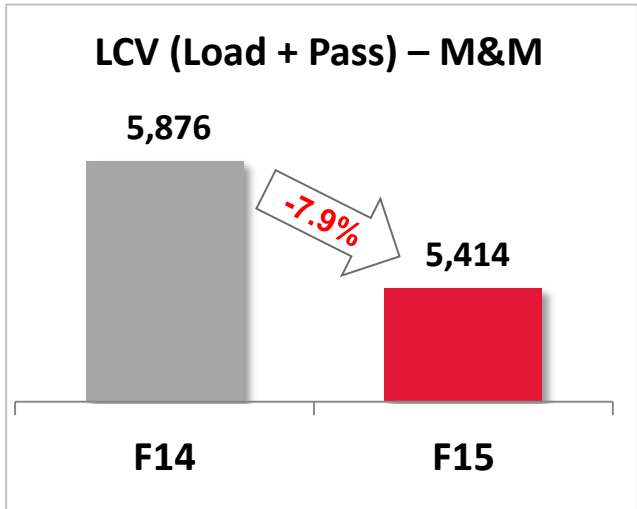
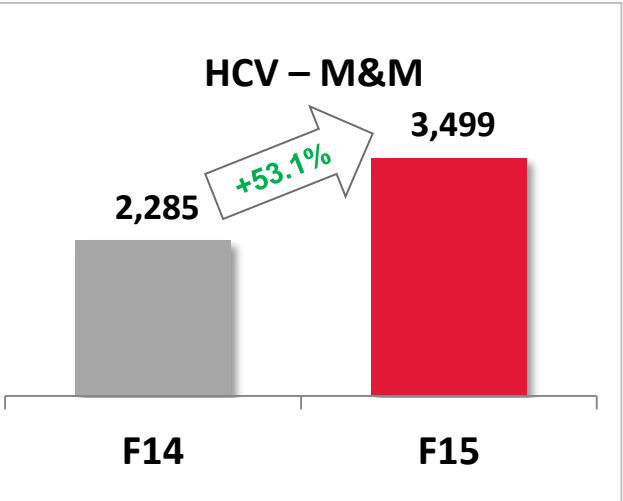
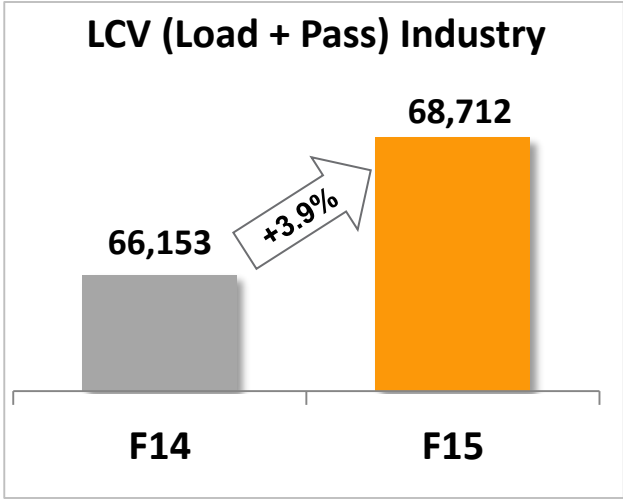
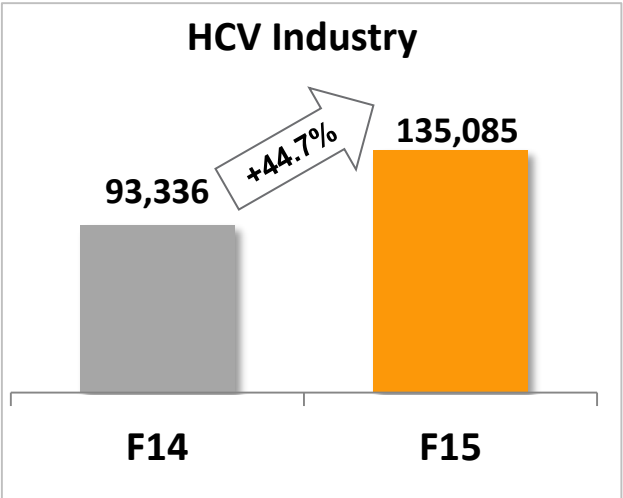
Strong focus on Africa markets

Increase in market share in Chile & Peru in despite slowdown

Prestigious order of 1470 vehicles bagged from Philippines Police force after competing with Global OEMs



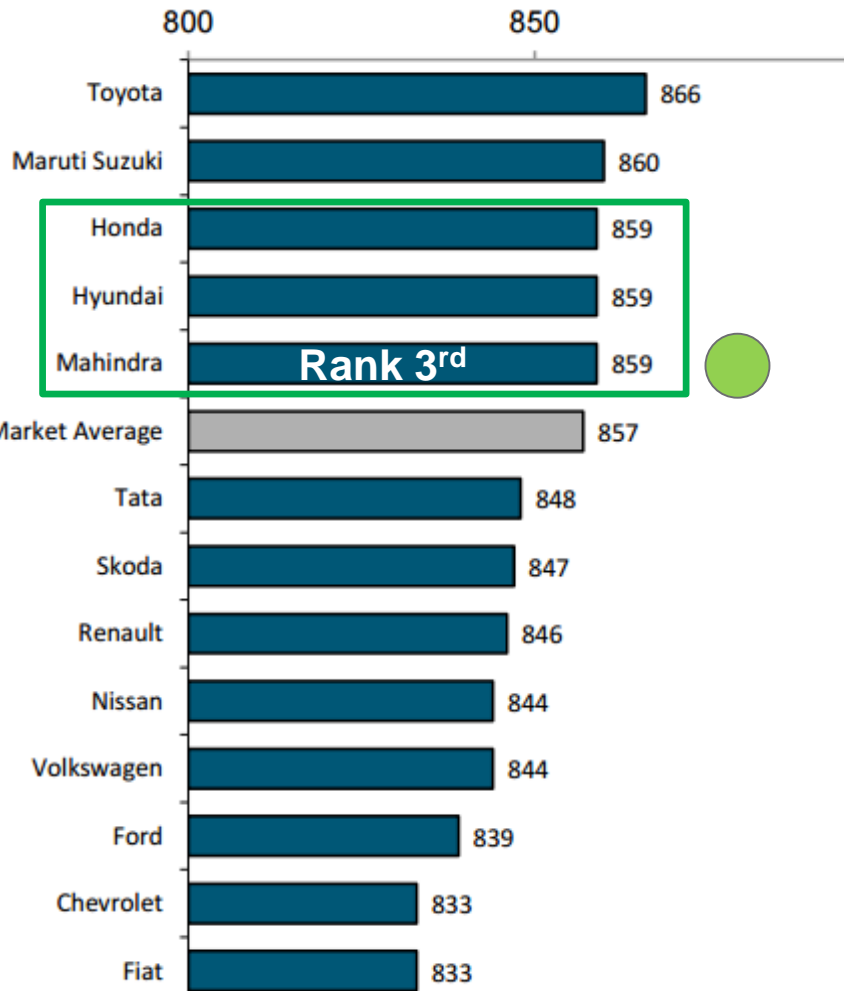
# F15 Performance – Trucks & Buses



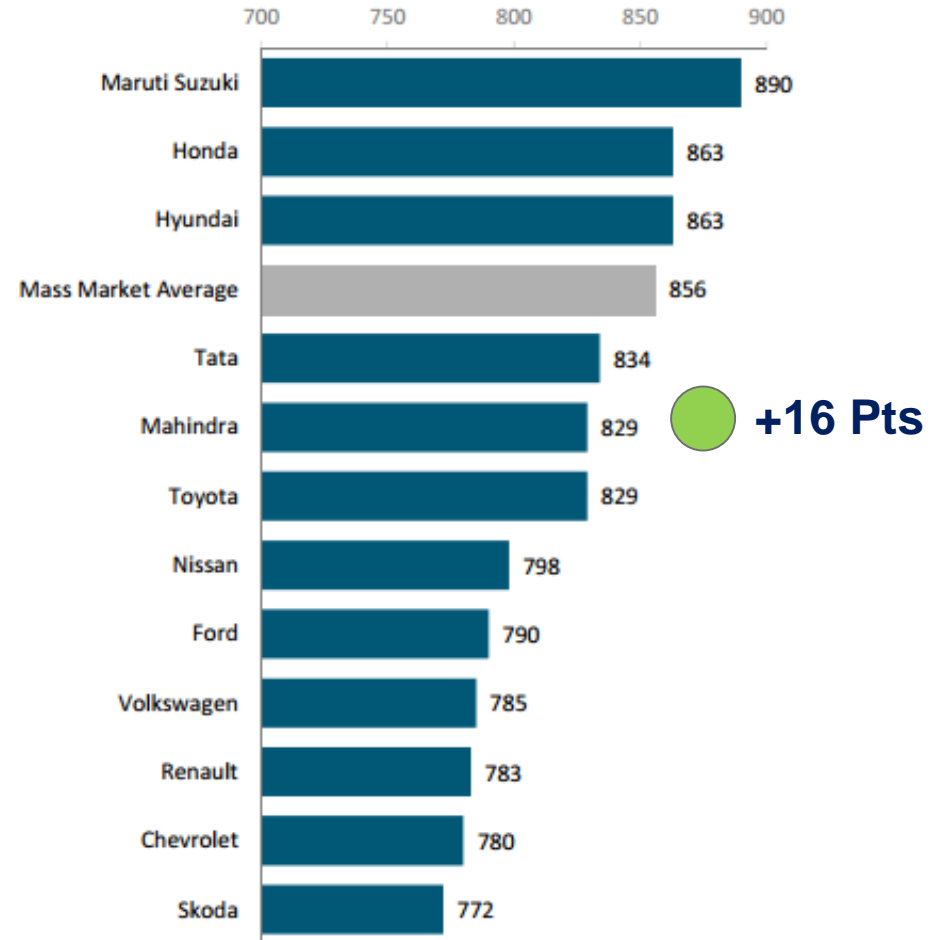


# Focus on Customer Satisfaction

3<sup>rd</sup> Rank in SSI



JD Power SSI 2014



JD Power CSI 2014

# Leading in Rural reach

- 33% Sales from Rural India in F15, a significant increase from 26% of last year
- Presence at Tehsil levels in pan-India through multiple formats
- Extensive synergy with Farm Division & 1200+ MMFSL outlets
- More than 250 Rural activation programs, Call center in vernacular medium and special field force to expand reach

**HAATS - THE RURAL SUPER MARKETS OF INDIA,  
WITNESS THE BIGGEST SYNERGY CAMPAIGN  
INVOLVING KEY BRANDS FROM  
THE MAHINDRA STABLE**

**हाट  
उत्सव**

Running successfully with 13,620 Enquiries, 2,349 Hot leads,  
3,670 Test drives & 217 On-spot bookings



**Mahindra**

**ग्रामीण  
महोत्सव**  
बेगुं, 12-13 जनवरी 2015

**आकर्षक सुविधाएँ**

- सीटिंग पीछा में बने कार्यालय का काम आसान
- विशाल साइड डोर की सुविधा और बंद बंद
- भूमे के भीतर का काम आसान बनाने की सुविधा
- बड़े कार्यालयों में भीर से आसान में आसान
- पुराने कार्यालयों का पुनर्निर्माण
- सीटिंग पीछा में बने कार्यालय का काम आसान

**आकर्षक ऑफरेंस**

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**स्थान: सामुदायिक भवन, बड़े बालाजी के मंदिर के सामने, बेगुं**

# Strengthening Brand in India



46 Mn+ Views

17 MN+ fans

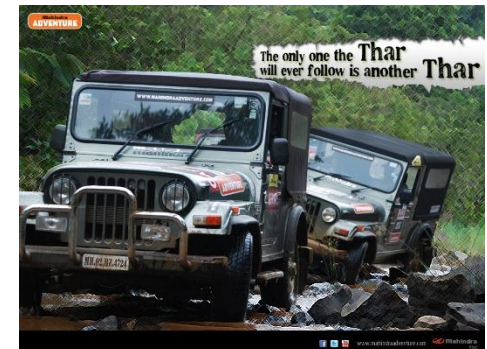
Pioneering Off-roading in India



Champions in Indian Rally Championship 2014



Purple Club – The best loyalty program Mahindra Great escapes



# Building brand in International markets

- Strong brand equity in SAARC markets
- 'Real People, Real SUVs' - Successful marketing campaign in South Africa
- Amongst the Top 20 Automotive Brands\* in Chile



# Celebrating 50 Lakh Vehicles

The 50 Lakh milestone vehicle, Mahindra Thar, was rolled down from Kandivali Plant on 5<sup>th</sup> Jan 2015



# Excellence in Quality – TPM Award

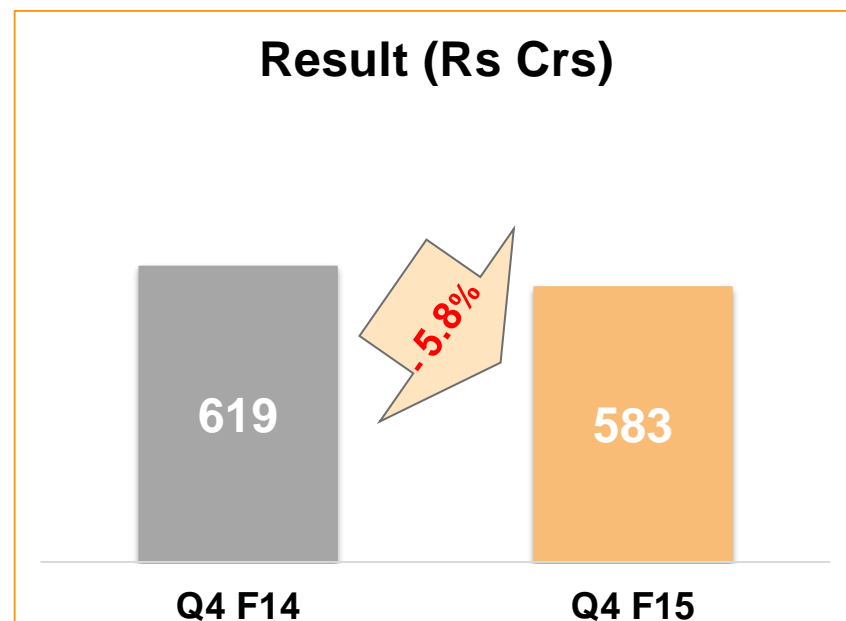
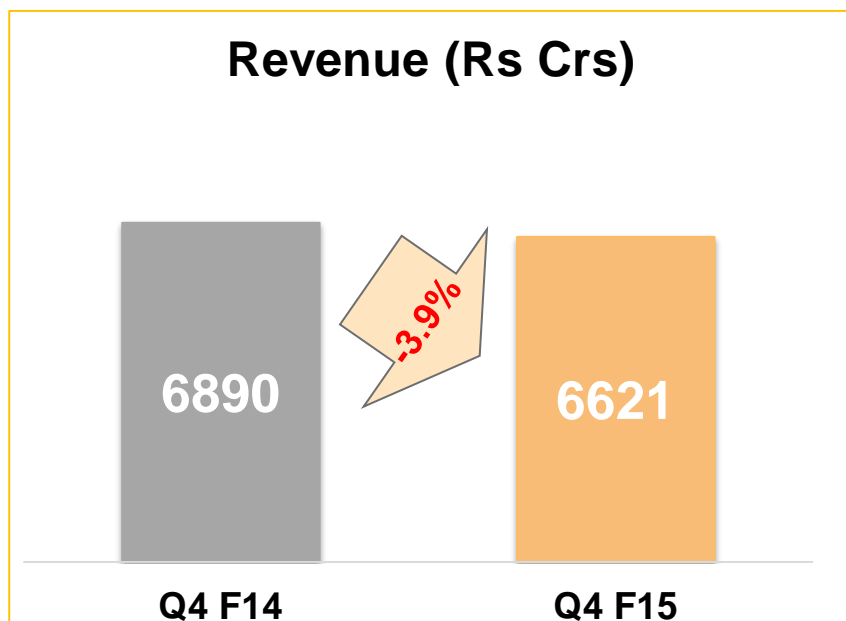
Awarded by JIPM on 18<sup>th</sup> Feb, 2015 in Kyoto, Japan





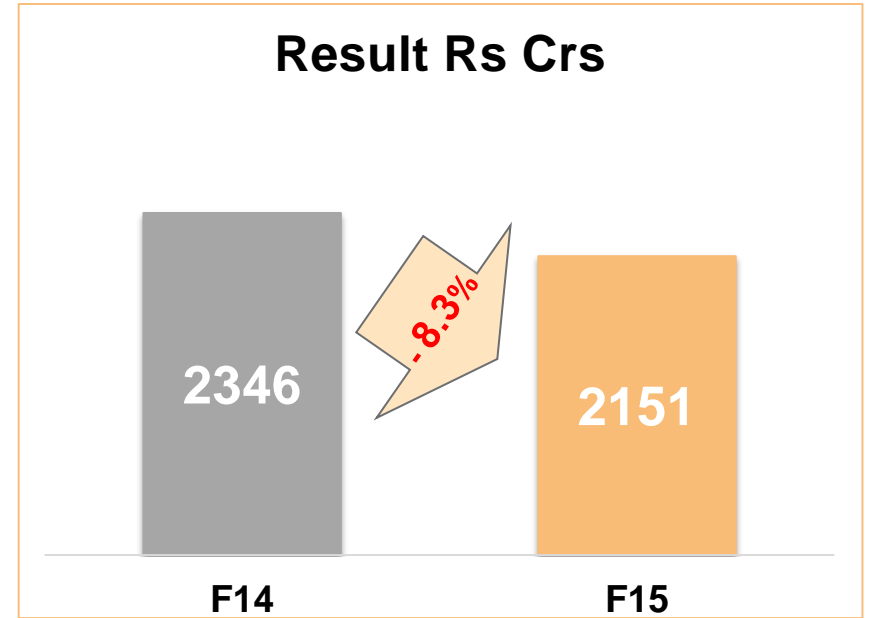
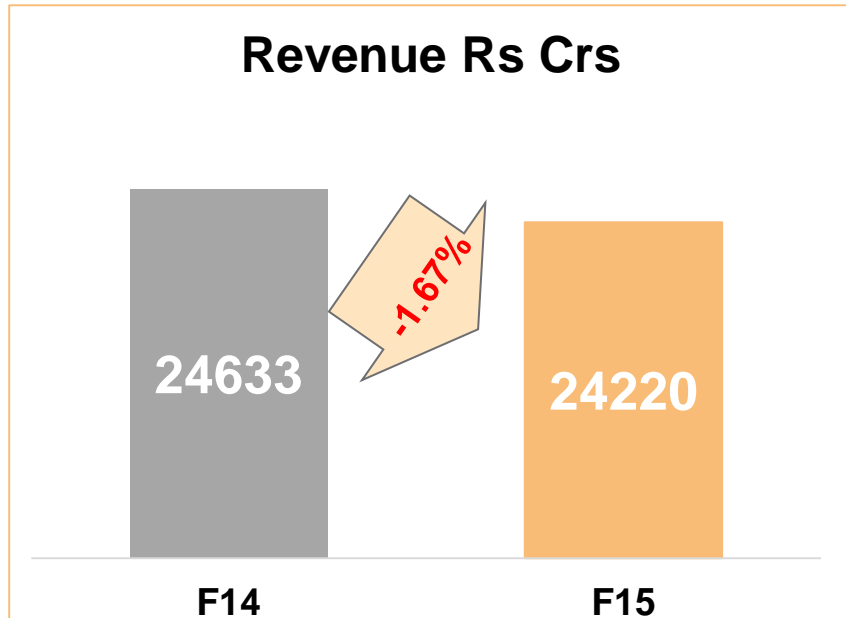
# F15 Performance

# Q4 F15 Financials Overview





# F15 Financials Overview





# Looking Ahead

# Thank You

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