

Analyst Meet - 2017

Automotive Sector

30th May-2017

F17 Domestic Market Performance

Segment	Industry		M&M	
	F17	Growth	F17	Growth
Utility Vehicles	761,997	29.9%	222,541	0.1%
Cars	2,102,996	3.8%	3,219	-5.2%
Vans	181,734	2.4%	10,370	-2.1%
PV Total	3,046,727	9.2%	236,130	-0.1%
LCV Goods < 2T GVW	116,890	0.3%	30,043	7.9%
LCV Goods 2 to 3.5T GVW	207,610	13.2%	136,564	7.7%
LCV Goods < 3.5T	324,500	8.2%	166,607	7.7%
LCV Passenger	50,864	3.9%	4,640	22.8%
LCV Goods > 3.5T GVW	36,339	5.6%	2,986	12.8%
LCV > 3.5T	87,203	4.6%	7,626	18.7%
M+ICV Goods (7.5 to 16.2T)	89,357	0.9%	-	-
HCV Goods (>16.2T)	165,910	-2.3%	6,715	17.7%
MHCV Goods	255,267	-1.2%	6,715	17.7%
3W	511,658	-4.9%	52,306	-4.9%
MHCV Passenger	47,262	7.6%	-	-
AS (Dom) Total	4,272,617	6.5%	469,384	2.5%

Growth Drivers

- GDP Growth 7.1%*
- CPI Inflation 4.5%*
- Softening Interest Rates
- Good Monsoon

* Care Ratings

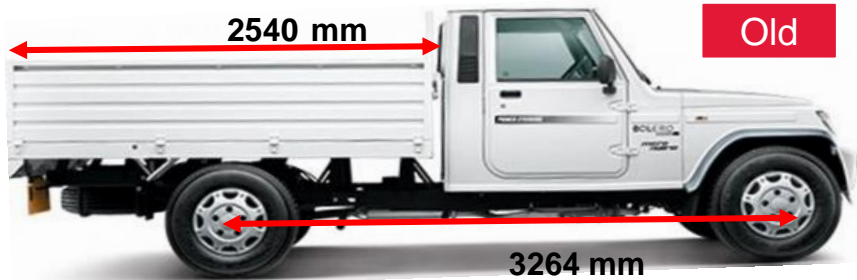
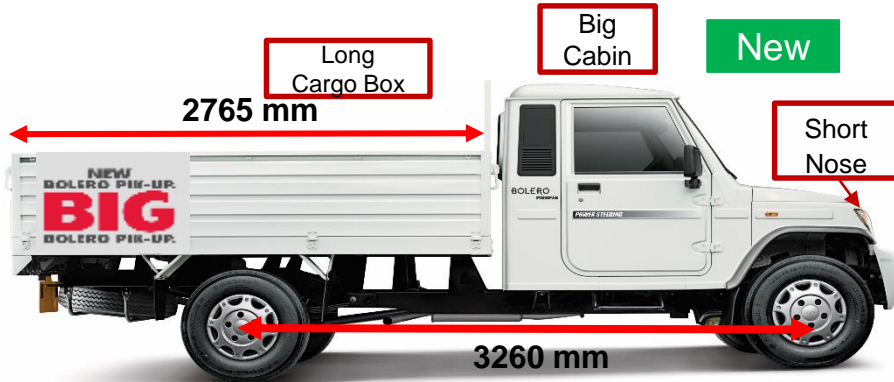
Challenges

- Hardening of Commodity Prices
- Demonetisation
- BSIII to BSIV Registration Challenge



Commercial Vehicles

Strengthening the SCV Portfolio



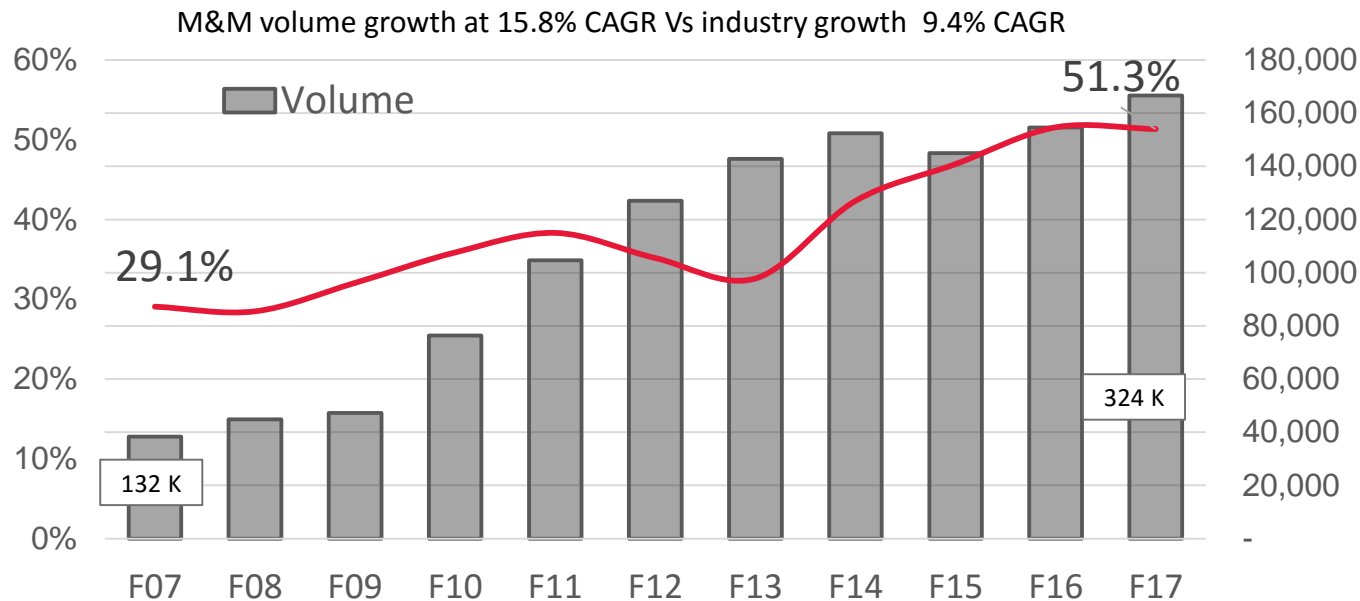
Building the Brand and Customer Confidence in HCV

Delhi-Mumbai Service Corridor



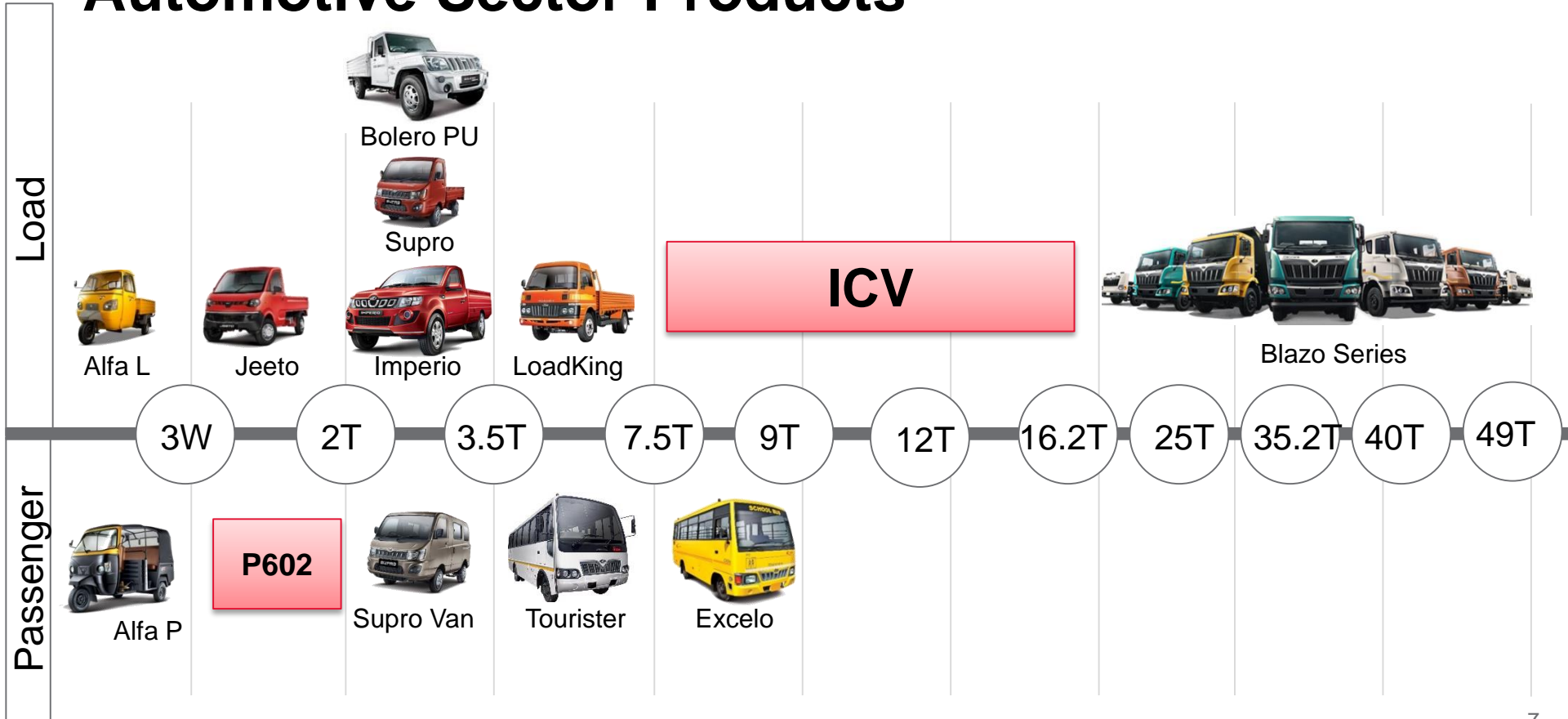
SCV Performance

Getting to a Dominating Position



- SCV Segment achieved Highest Ever Volumes of **166,607 Nos.**
- Widest range of offerings thru 3 Brands of : Jeeto , Supro & Bolero Pickups (0.6 T to 3.5 T).
- Consistently maintained > 50% market share since last 2 Years.

Automotive Sector Products





Passenger Vehicles

Strengthening the Bolero and Scorpio Brands



- More Power
- Better Mileage
- Better Maneuverability
- Enhanced warranty



Sprucing up TUV300 & KUV100



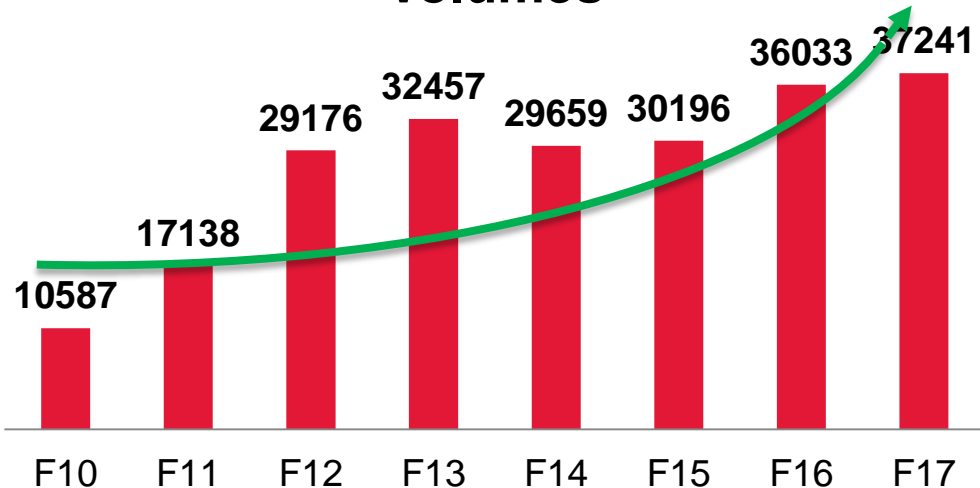


Exports from India

International Operation Performance

Building Brand – Channel – Product portfolio

International Operations Volumes



KUV100 Launch in S. Africa



KUV100 Launch in Nepal



Scorpio PickUp launch in Taiwan



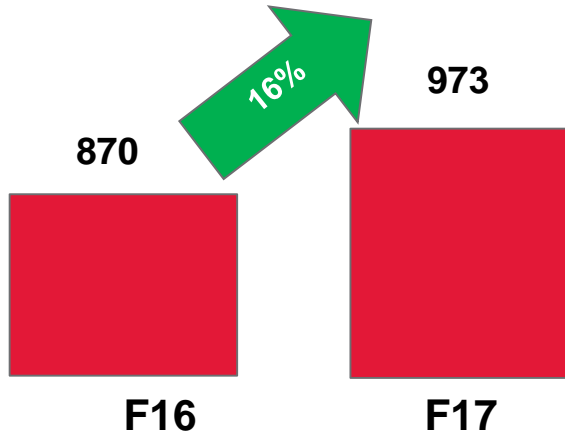
CKD Assembly Plant, Bangladesh



Electric Mobility

Mahindra Electric Performance

Vehicle Sales



New Launches in F17



e-Supro
(Cargo & Passenger Van)

E20 Plus

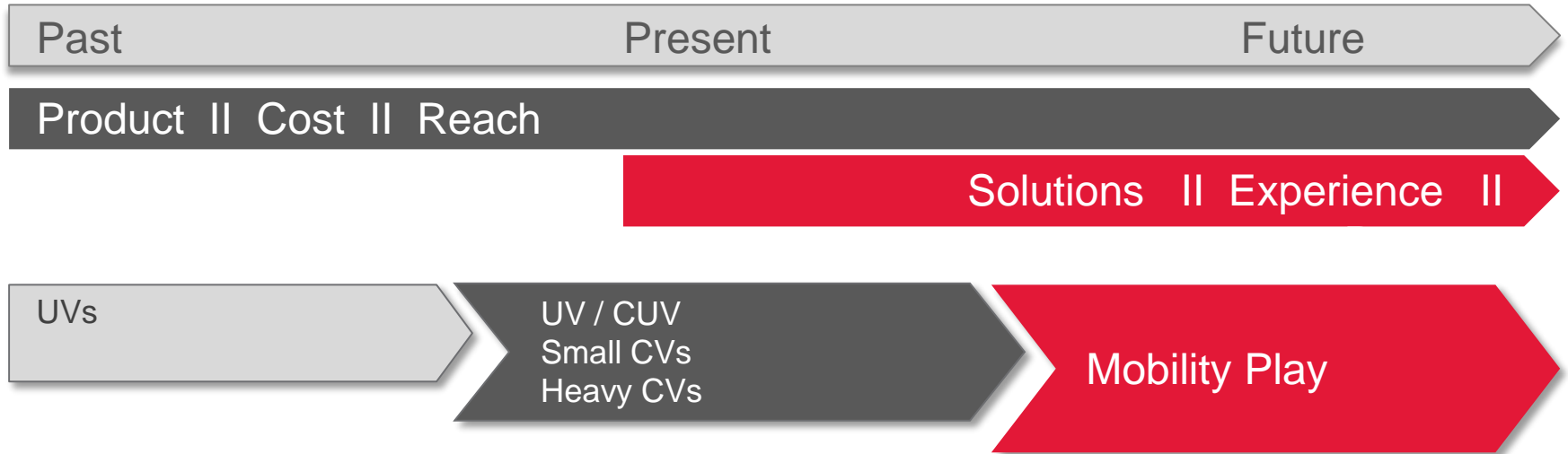


e-Verito

Powertrain Division : 1bn USD revenue by F22.

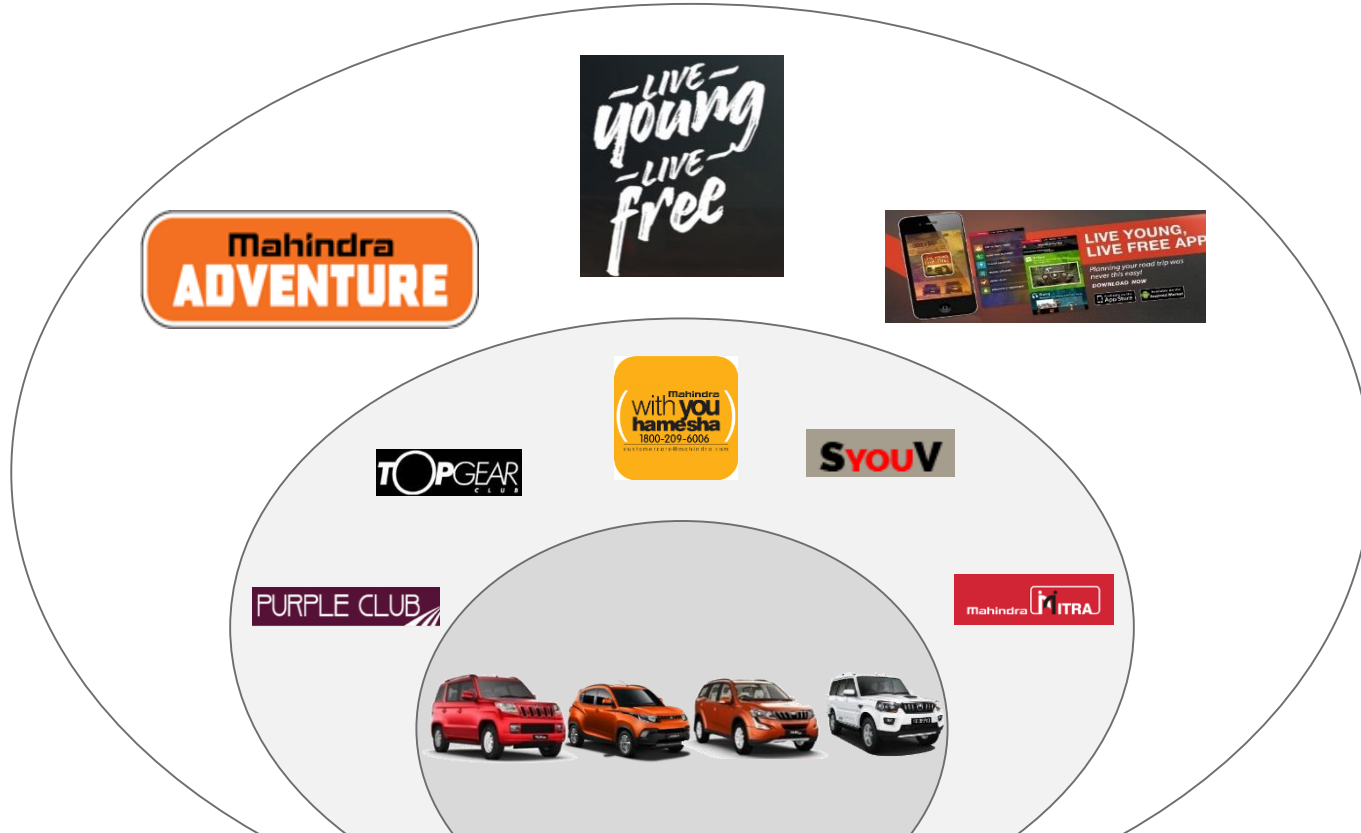
- 9.3 L Engines for 250 to 320KVA. DG launch in F18Q2.
 - Redefining HkVA service offerings to double the market share.
- BIO CNG plants; 10 projects on hand.
- Green Gensets foray (Li ion batteries) -First order for 10000 nos.
- Leveraging Telecom connect to enter Energy management solutions.

Futurise



- Objects of Desire & Mobility
- Customer Experience
- Connected and Clever
- Sustainable
- Mobility Ecosystem
- Mobility Platforms

PV Ecosystem - Live Young Live Free



CV Ecosystem - Takdeer Badal De

तकदीर
बदल दे

SMART
SHIFT
by Mahindra
BUSINESS KO LIFT KARO

DIGI SENSE
by Mahindra



MILAAP
Creating partnerships for progress



Technologies for Tomorrow

Powertrain



Euro 6 and BS 6

Full Range of Gasoline & CNG Powertrains

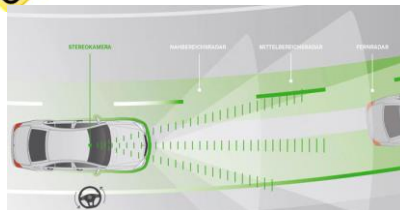


EV, Plug-in Hybrid Hydrogen

Safety, Assisted Driving



Bharat New Vehicle Safety Assessment Program (**BNVSAP**)



Intelligent & Assisted Driving

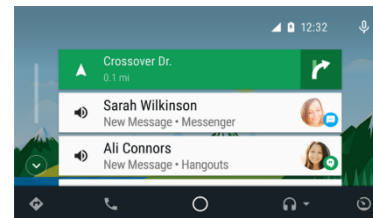


Cross Traffic Alert

Infotainment, Connected Car



Ecosense



Android Auto



Apple Car Play

Digital Value chain



Digital CRM

Product Definition

Product Development

Manufacturing

Pre Sales

Sales

After Sales

Virtual Testing & Validation

Automation

Digital Marketing

Use of Analytics

With You Hamesha 4.0



Going Forward

Focus Areas

- Enhance UV portfolio.
- Range completion in commercial vehicles.
- GST implementation.
- Crash & Safety Norms.
- BSVI emission Norms.
- Building digital business enterprise.



Mahindra
Rise.

Thank You

Disclaimer

Mahindra & Mahindra herein referred to as M&M, and its subsidiary companies provide a wide array of presentations and reports, with the contributions of various professionals. These presentations and reports are for informational purposes and private circulation only and do not constitute an offer to buy or sell any securities mentioned therein. They do not purport to be a complete description of the markets conditions or developments referred to in the material. While utmost care has been taken in preparing the above, we claim no responsibility for their accuracy. We shall not be liable for any direct or indirect losses arising from the use thereof and the viewers are requested to use the information contained herein at their own risk. These presentations and reports should not be reproduced, re-circulated, published in any media, website or otherwise, in any form or manner, in part or as a whole, without the express consent in writing of M&M or its subsidiaries. Any unauthorized use, disclosure or public dissemination of information contained herein is prohibited. Unless specifically noted, M&M or any of its subsidiary companies is not responsible for the content of these presentations and/or the opinions of the presenters. Individual situations and local practices and standards may vary, so viewers and others utilizing information contained within a presentation are free to adopt differing standards and approaches as they see fit. You may not repackage or sell the presentation. Products and names mentioned in materials or presentations are the property of their respective owners and the mention of them does not constitute an endorsement by M&M or its subsidiary companies. Information contained in a presentation hosted or promoted by M&M is provided "as is" without warranty of any kind, either expressed or implied, including any warranty of merchantability or fitness for a particular purpose. M&M or its subsidiary companies assume no liability or responsibility for the contents of a presentation or the opinions expressed by the presenters. All expressions of opinion are subject to change without notice.