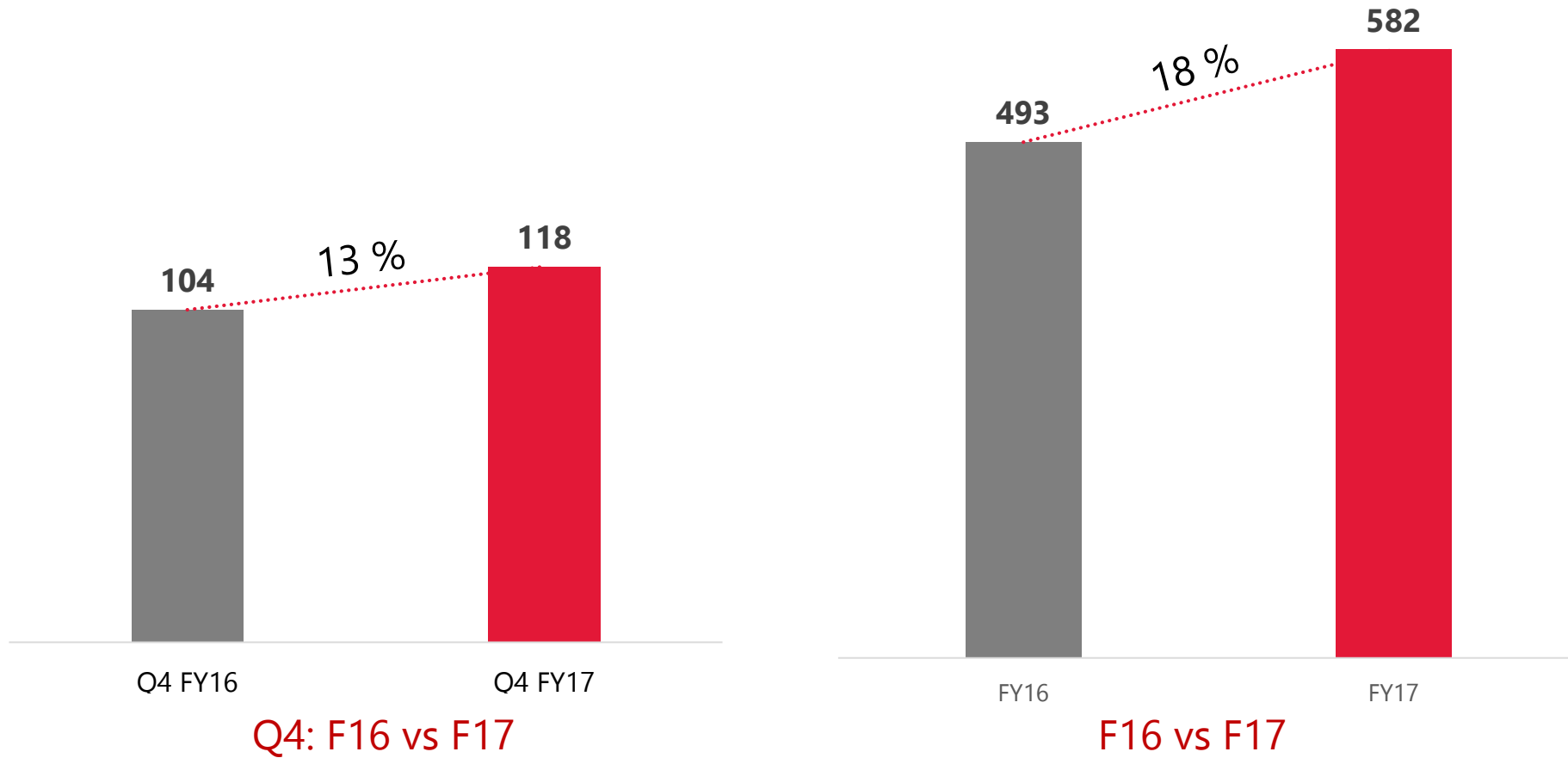


Mahindra Farm Equipment Sector

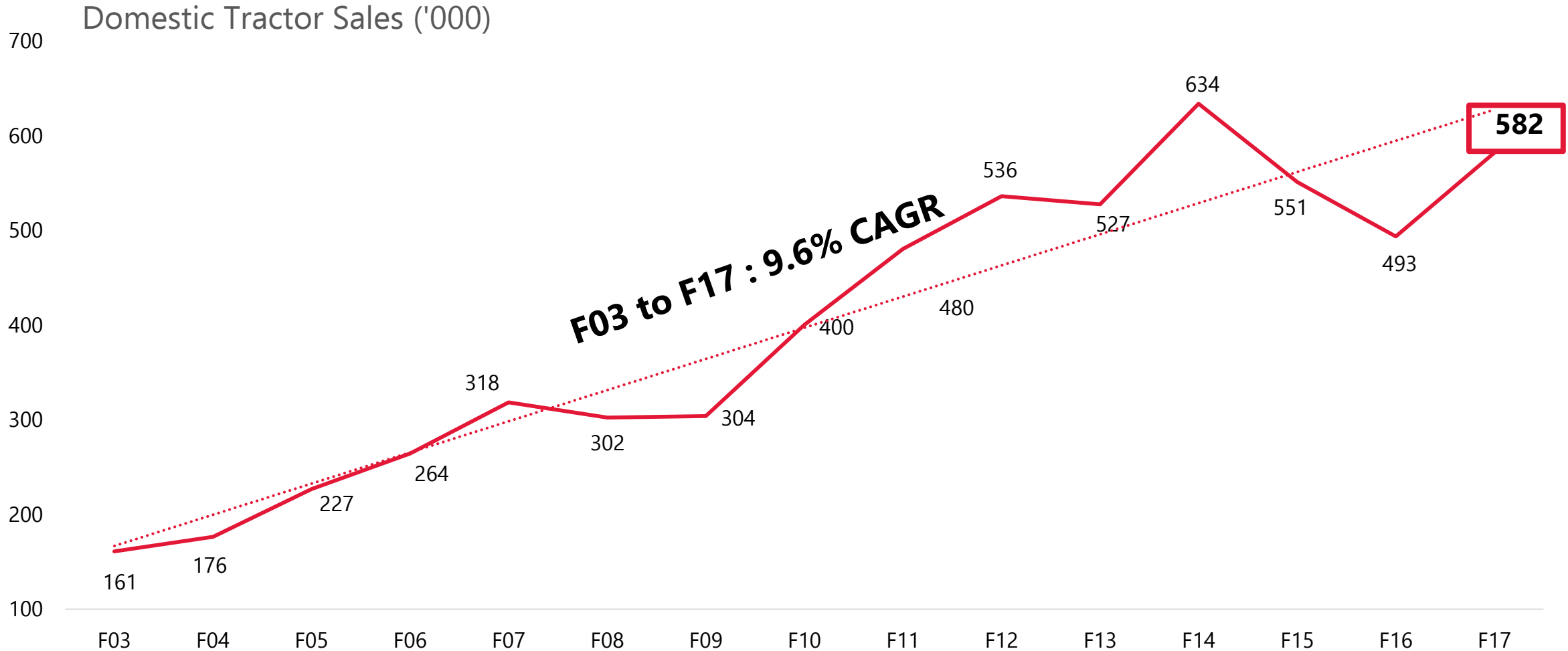
Analyst Meet F17

Industry volumes



Volume in "000

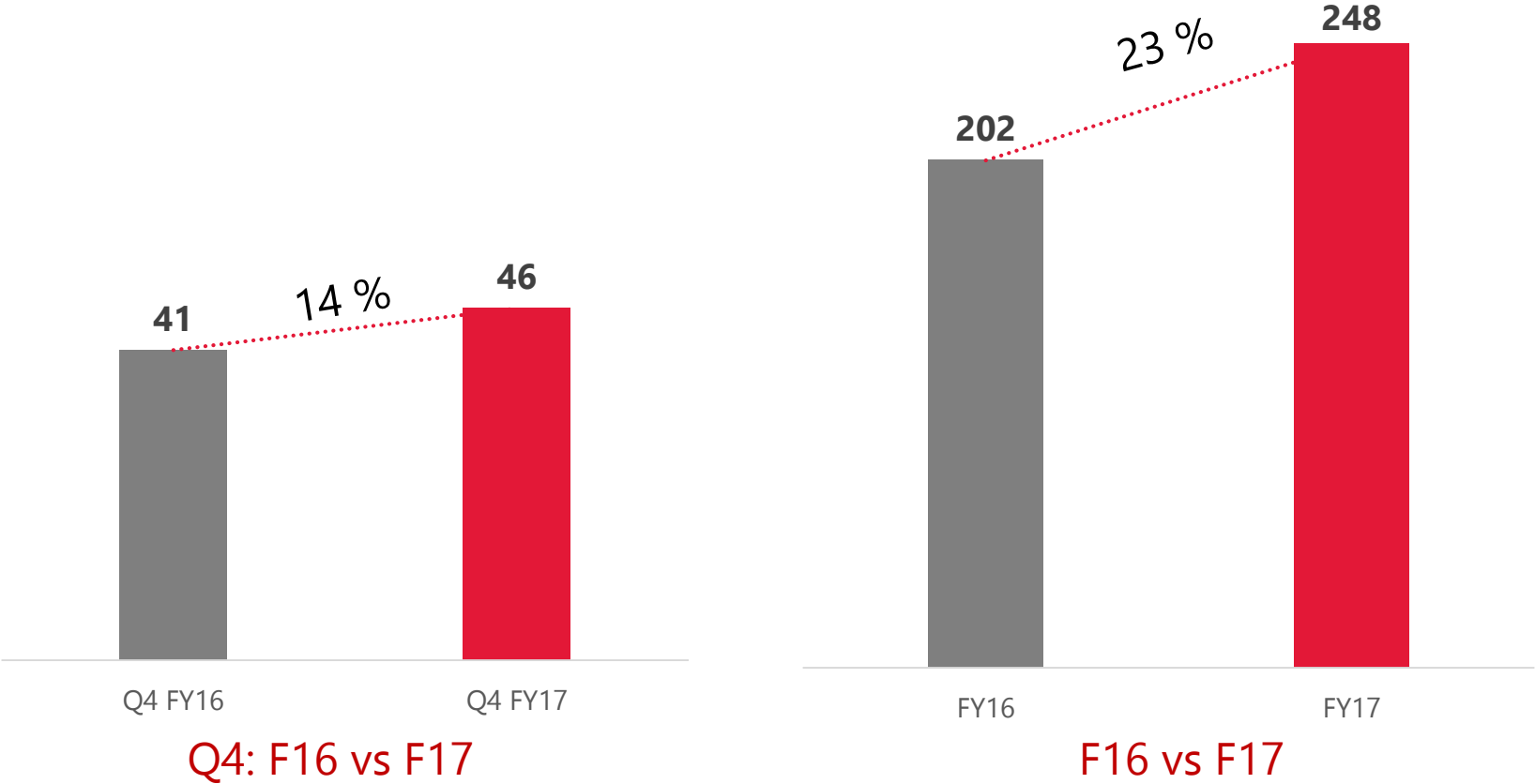
Industry Volume



Industry recovered sharply from F16

Industry growth over last year: 18%. FES growth over last year: 23%

FES Domestic Tractor volumes

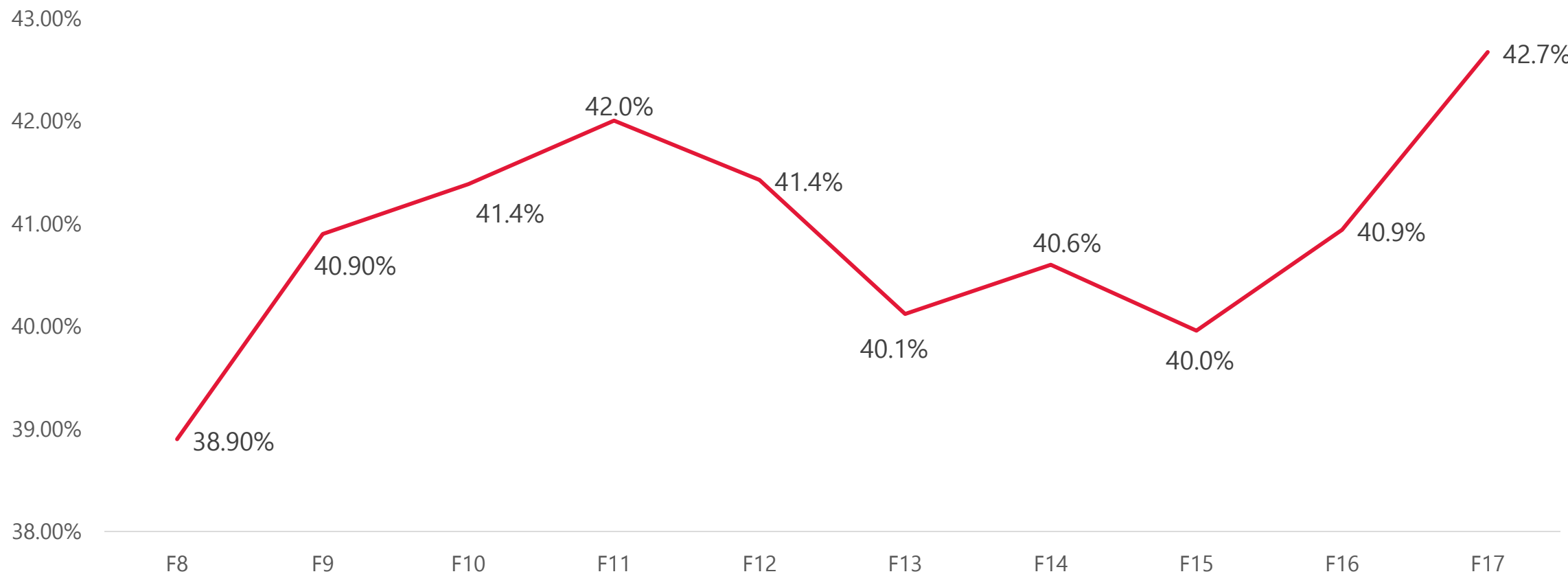


Volume in '000

34 years of Domestic Leadership

- **Highest ever Market Share (42.7%)**
- **Highest ever MS gain of 1.8% points**

Maintaining No. 1 position



MS Gain Enablers: Product Strategy



Mahindra YUVO



Swaraj 742 FE



Mahindra 585 DI



Mahindra Arjun Novo

Blockbuster success – YUVO

Delivered on its promise of More, Faster & Better



32hp | 35hp | 40hp | 42hp | 45hp

- The YUVO HP range covers 70%-80% of the Industry
- Redefining image of Mahindra Tractors as technologically advanced

Pioneering Technology: Mahindra JIVO

Power I Performance I Profit

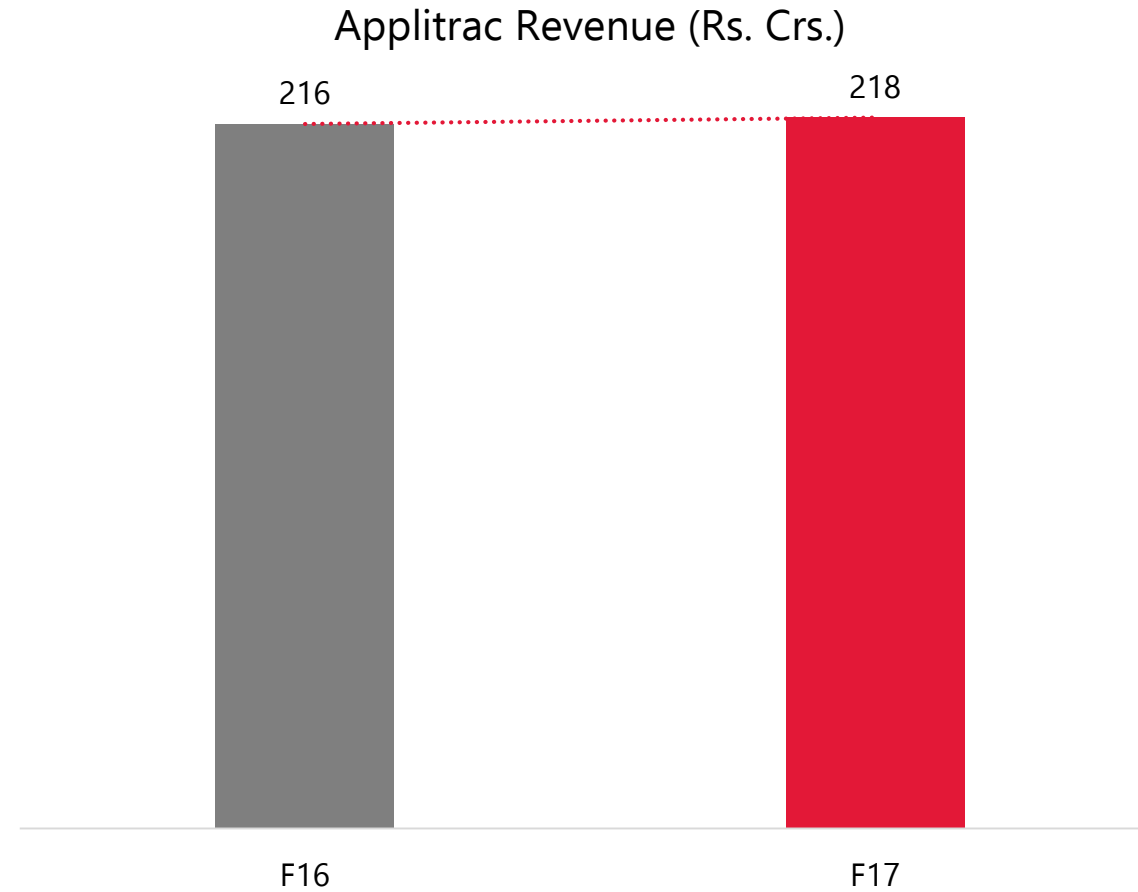


- 24 HP 4 wheel drive tractor best suited for row crops & horticulture applications
- Multi-application suitability in crop care, land preparation, inter culture & vineyard spraying

MS Gain: Other Key Enablers

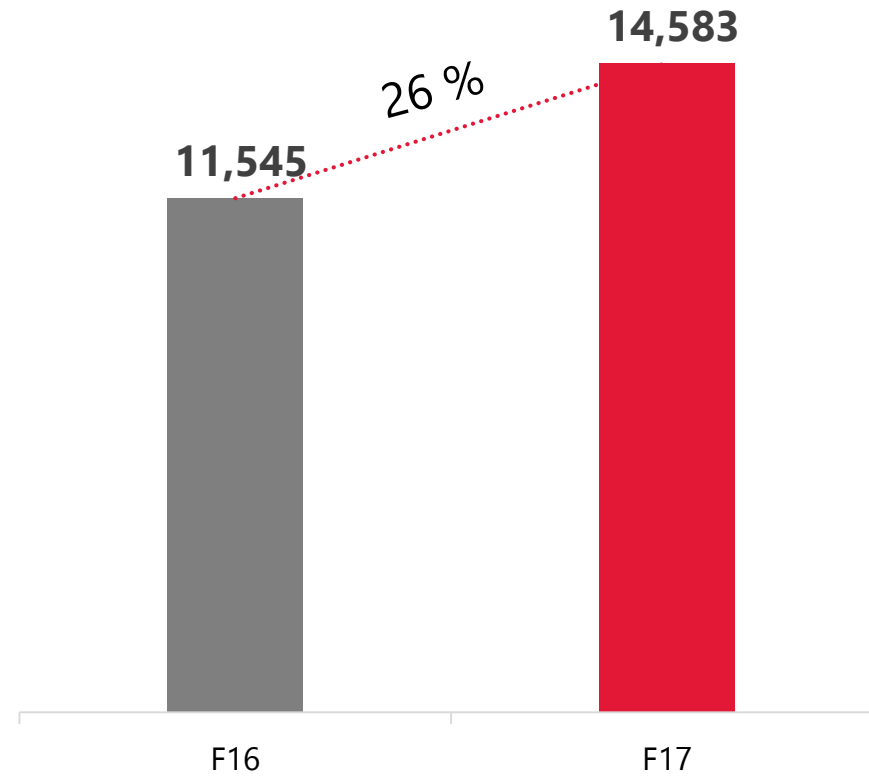
- Customer Centricity
- Strengthened Channel
- Continued focus on Quality
- Cost Management

Applitrac Business



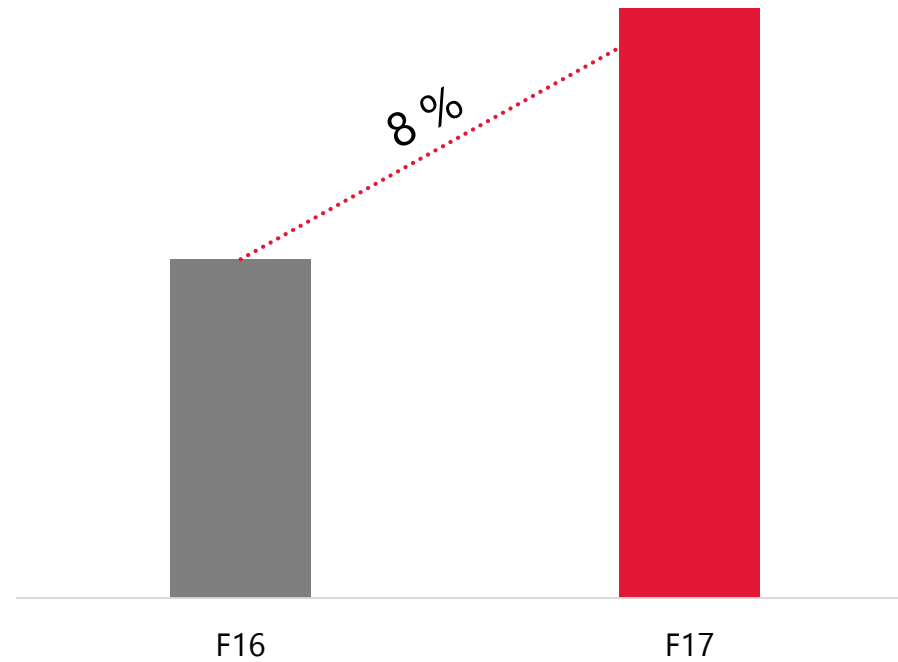
Export Volumes

Highest ever tractor exports



Mahindra USA

REVENUE (USD Mn)



FUTURISE

Rise.

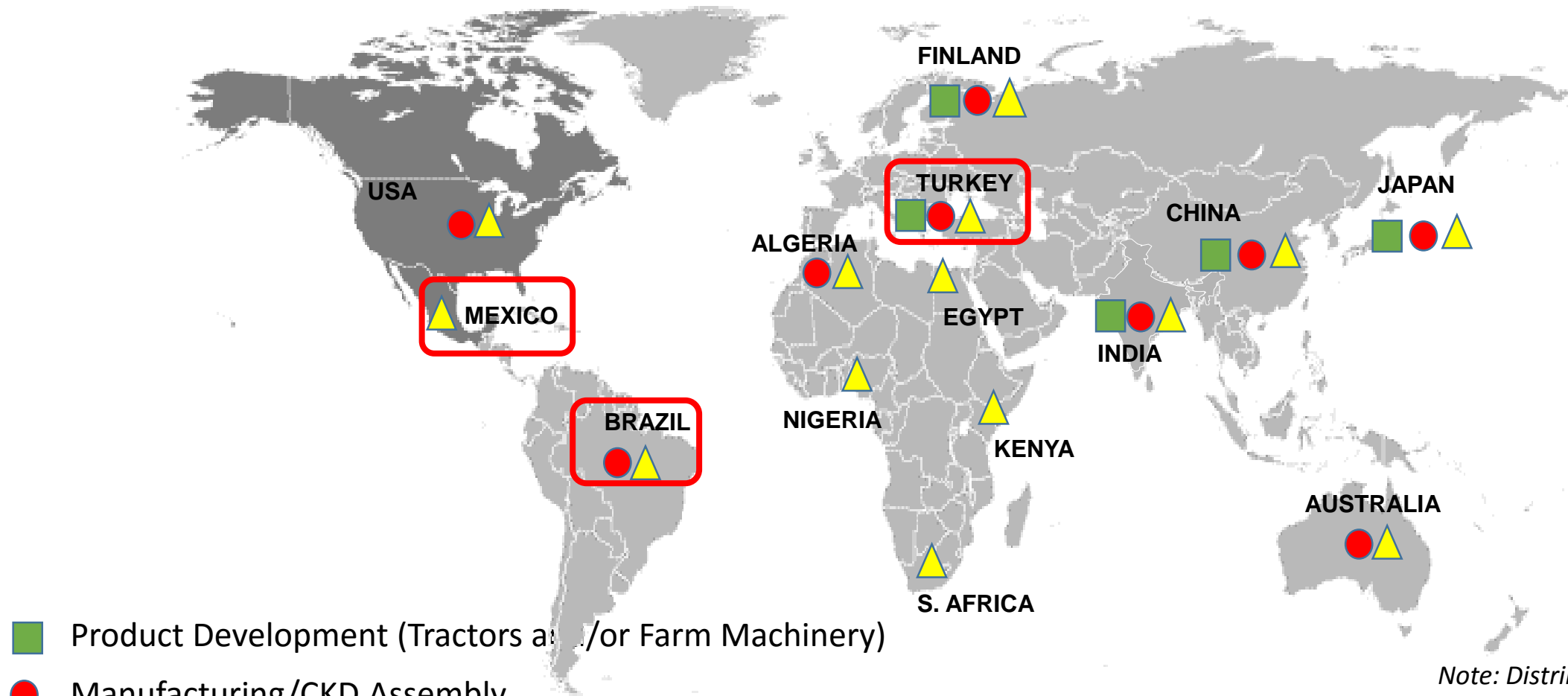
Farming 3.0

- Smart Farm Machinery
- Precision Farming
- Digital Platforms

Globalisation

- M&A
- Manufacturing Footprint
- R&D Network
- Brand & Sales Infrastructure

Globalization Journey



Note: Distributor sales in other 25+ countries have not been shown

Industry Outlook: F18

- **Favorable Monsoon in F18**
 - **IMD forecast: 96 % of the LPA**
 - **Skymet forecast: 95% of the LPA**

Mahindra
Rise.