

A photograph of a modern building with a stone wall and large glass windows, set against a clear blue sky and green trees. The building is surrounded by a well-maintained green lawn with some small trees and flower beds. A blue banner with white text is overlaid on the image.

ANAND Group Corporate Presentation

2021

LEADING PLAYER ACROSS TWO VERTICALS

AUTOMOTIVE

HOSPITALITY



14,000
EMPLOYEES

1.3 BILLION
US DOLLAR
REVENUE

59
LOCATIONS

12 JOINT
VENTURE
COMPANIES

19
COMPANIES

7 TECHNICAL
COLLABORATIONS

GROUP COMPANIES

1961
Gabriel India

1962
VGIL¹/ PCIL²

1966
Purolator³

1992/ 1993
· Chang Yun India
· Dana/Spicer

1995/ 1997
· Ansysco
· Henkel
· Faurecia
· Behr (now MAHLE)
· Mando (Brakes)
· Valeo Friction

1998
Haldex

2005
MAHLE Filter

2006
Mando (Suspension)

2007
Takata⁴

2008/2010
· Chang Yun Myutec
· Anchemco

2012
Valeo Service

2013
Mando (Steering)

2019
Joyson Safety Systems

2007
Diversification into luxury hospitality
SUJÁN Sher Bagh

2009
SUJÁN The Serai

2013
SUJÁN JAWAI

1961 - 1994

1995 - 2005

2006 - 2019

OTHER MILESTONES

1976
SNS Foundation,
the CSR arm

2003
ANAND
Supervisory Board

2019
ANAND Group companies are recognised amongst 100 Best Companies in India. Also, featured in Best Workplaces for Women by Great Place to Work®

Deep C Anand Foundation



Deep C. Anand

Chairman & Chief Mentor, DCA Foundation



Kiran D. Anand

Trustee



Anjali Singh

Trustee



Jaisal Singh

Trustee



Lorenzo Piaget

Trustee



Rohit Arora

Trustee



Deepak Chopra

Trustee

Group Supervisory Board



Anjali Singh

Executive Chairperson, Group Supervisory Board
Executive Chairperson, ANAND & Gabriel India
Chairperson, Spicer India
Member PC & OC



Jaisal Singh

Chief Executive, SUJÁN
Member PC & FARC



Rohit Arora

Founder & Chairman, Silverskills
Member PC & FARC



Deepak Chopra

Member PC & OC



Lorenzo Piaget

Partner, Piaget & Associés
Member FARC



Tejpreet Chopra

President & CEO, Bharat Light Power
Member OC & FARC

ANAND Executive Board



Anjali Singh

Chairperson



Jaisal Singh

Vice Chairman



Mahendra K. Goyal

Group President & Co-Chief Operating Officer



Manoj Kolhatkar

Group President & Co-Chief Operating Officer



Jagdish Kumar

Group President & Chief Financial Officer



Sunil Kaul

Group President & Chief Technology Officer



S. Sarathi

Group President & Chief Compliance Officer



Sumit Bhatnagar

Group President & Chief Human Resource Officer

Vision

To Create Value Sustainably Through Pursuit of Excellence and Good Governance



BE THE FIRST CHOICE
FOR CUSTOMERS



BUILD &
SUSTAIN STRATEGIC
PARTNERSHIPS



STRENGTHEN
CORPORATE
GOVERNANCE &
CITIZENSHIP



DEVELOP,
EMPOWER &
GROW PEOPLE



ASPIRE
AND DARE TO BE
INNOVATIVE



ATTAIN
LEADERSHIP
IN TECHNOLOGY



CREATE INSPIRED
LEADERSHIP & PROMOTE
ENTREPRENEURIAL
SPIRIT



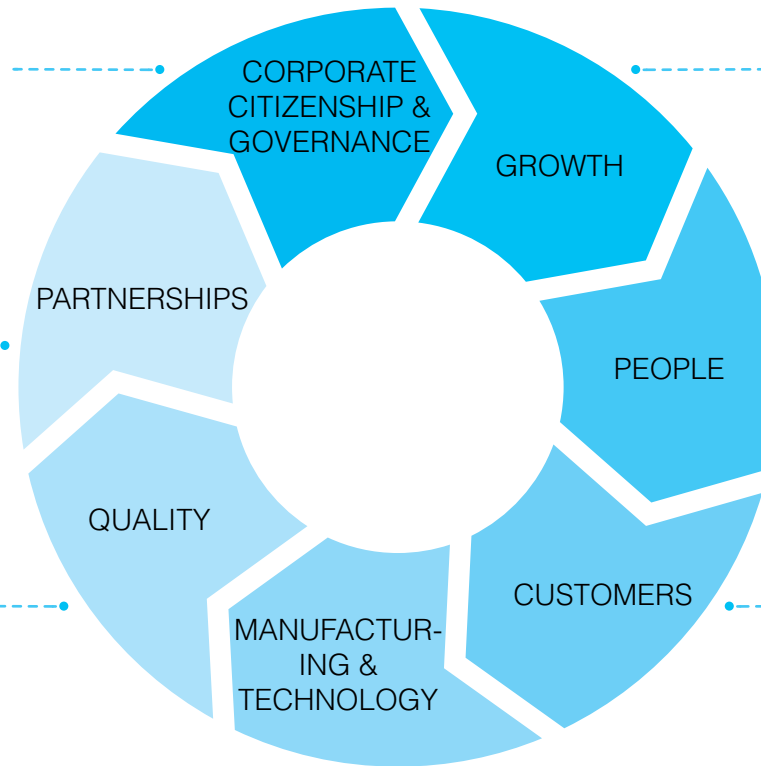
ACHIEVE SUPERIOR
BUSINESS
PERFORMANCE &
GROWTH

Strategic goal is to achieve revenue of 2.5 Billion US Dollars by 2022

- Be always ethical
- Enhance fairness and transparency
- Strengthen CSR activities under SNS Foundation
- Ensure robust strategic planning and execution
- Strengthen governance through ANAND Supervisory Board

- Build and sustain strategic partnerships
- Exchange best-in-class management practices between partners
- Strengthen “Unified corporate entity”

- Foster a culture of quality
- Deploy world-class quality standards, tools and systems



- Be top 3 player in each segment
- Aim to grow ahead of the market

- Live by “Business is 90% people”
- Attract and retain talent
- Empower people and encourage accountability
- Develop people for required skills and experience

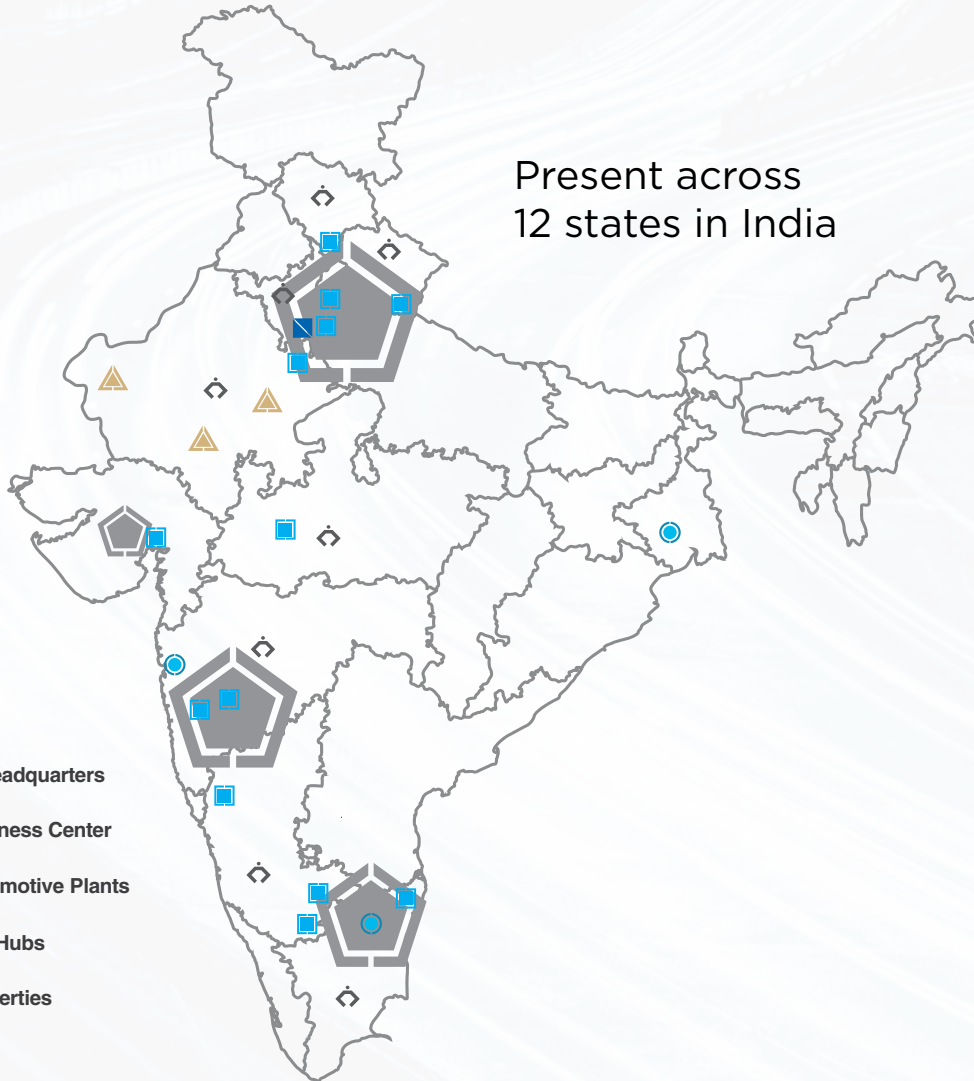
- Become the preferred supplier of our customers
- Provide value and exceed customer expectations
- Nurture strong and enduring customer relationships

- Achieve operational excellence through lean production systems
- Develop supplier base through VSME* programme
- Aim to spend 2% of sales in R&D
- Develop innovative processes and products to stay competitive

*VSME: Visionary Small and Medium Enterprise

BEING CLOSE TO CUSTOMERS

Present across 12 states in India



- Corporate Headquarters
- ANAND Business Center
- ANAND Automotive Plants
- India's Auto Hubs
- SUJÁN Properties
- SNSF

Himachal Pradesh (Parwanoo)

ANCHEMCO ANSYS CO GABRIEL Henkel MAHLE SNS Foundation

New Delhi (Corporate Headquarters)

ANAND SUJÁN

Haryana (Gurugram, Manesar)

ACYM SAM GABRIEL Henkel JOYSON MAHLE SNS Foundation

Uttar Pradesh (Greater Noida)

MAHLE

Uttarakhand (Pantnagar)

SAM SNS Foundation

Rajasthan (Neemrana, Ranthambhore, Jaisalmer, Jawai Bandh)

JOYSON SNS Foundation SUJÁN

Madhya Pradesh (Dewas)

GABRIEL SNS Foundation

Gujarat (Ahmedabad, Sanand)

GABRIEL MAHLE

Maharashtra (Aurangabad, Mumbai, Pune, Nashik, Pirangut, Satara)

ANAND SAM GABRIEL faurecia Haldex JOYSON POWER MAHLE SNS Foundation

Karnataka (Bangalore, Jodhalli, Malur)

SAM faurecia GABRIEL SNS Foundation

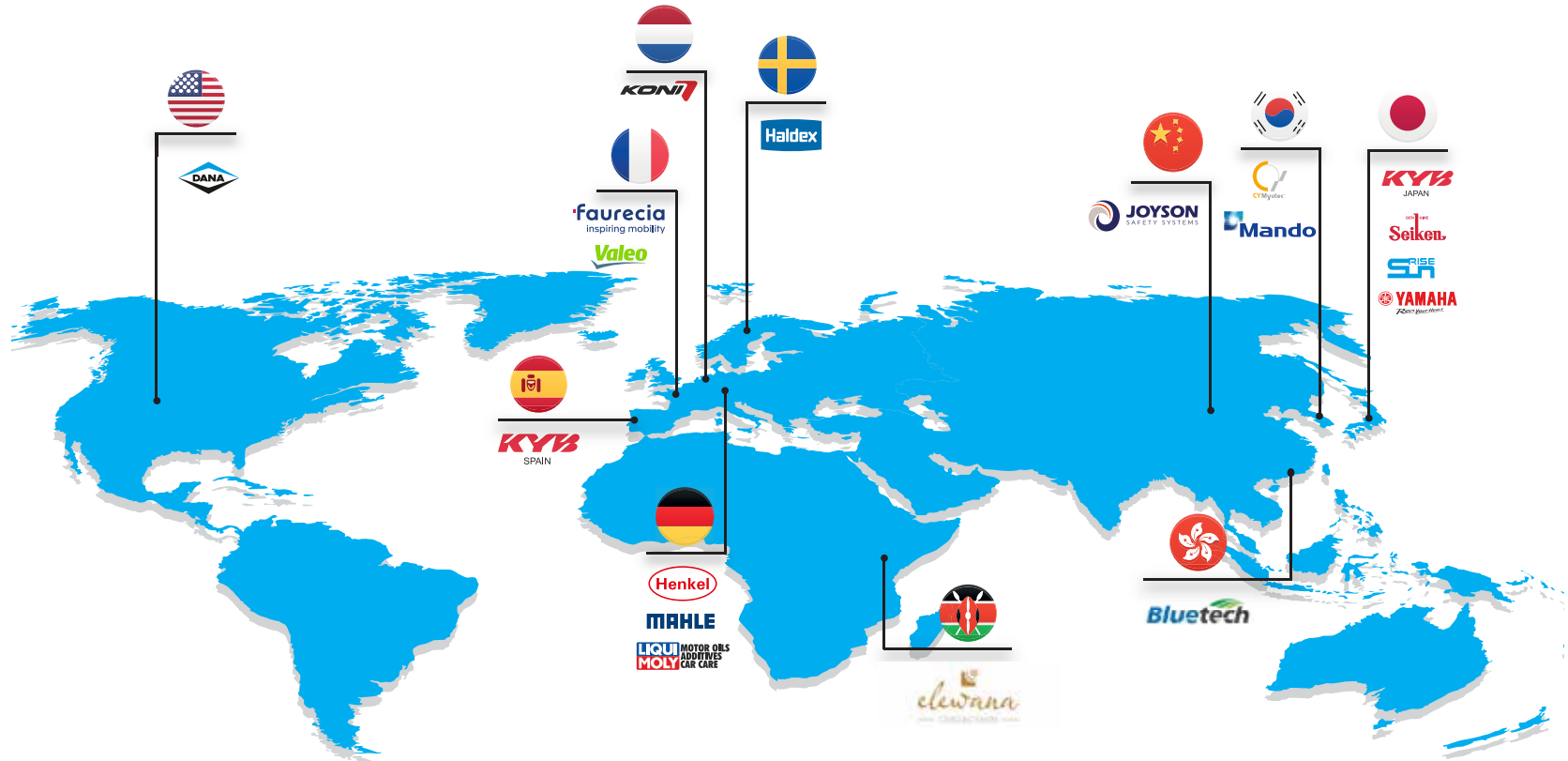
Tamil Nadu (Chennai, Hosur)

ANAND ANCHEMCO faurecia GABRIEL Henkel JOYSON MAHLE Mando SNS Foundation Valeo

West Bengal (Kolkata)

ANAND

Maps are not to scale and show approximate locations only.



JOINT VENTURE PARTNERS

CY Myutec, Korea
 Dana Incorporated, USA
 Elewana Collection, Kenya
 Faurecia Clean Mobility, France
 Haldex AB, Sweden
 Henkel KGaA, Germany
 Joyson Safety Systems, USA/China
 MAHLE GmbH, Germany
 Mando Corporation, Korea
 Valeo, France

TECHNICAL COLLABORATIONS

Bluetech Holdings Ltd., Hong Kong
 KONI BV, The Netherlands
 KYB Corporation, Japan
 LIQUI MOLY GmbH, Germany
 Seiken Chemical Industry Company, Japan
 Sunrise MSI Corporation, Japan
 Yamaha Motor Hydraulic Systems, Japan

AUTOMOTIVE PARTNERING WITH GLOBAL LEADERS



JV PARTNERS	HEADQUARTERS	REVENUE*	EMPLOYEES*	BUSINESSES
CY Myutec	Korea	KRW 108 Billion	301	Synchronizer rings for transmission
DANA	USA	\$ 8.6 Billion	36,000	Drivetrain and E-propulsion systems
Faurecia	France	Eur 17.8 Billion	1,15,496	Seating, Interiors, Clean Mobility & Clarion Electronics
Haldex	Sweden	SEK 5.2 Billion	2,172	Brake and air suspension systems for heavy vehicles
Henkel	Germany	Eur 20.1 Billion	52,650	Adhesive Technologies, Beauty Care and Laundry & Home Care
Ningbo Joyson	China	CNY 61.7 Billion	57,415	Auto Electronics, Auto Safety, E-Mobility, Auto component
MAHLE	Germany	Eur 12.0 Billion	77,015	Engine Systems & Components, Filtration & Engine Peripherals, Thermal Management and Electronics & Mechatronics
Mando	Korea	KRW 5982 Billion	12,437	Brake System, Steering System, Suspension System, Driver Assistance System & Electronics
Valeo	France	Eur 19.5 Billion	1,14,700	Driving Assistance Systems, Powertrain Systems, Thermal Systems and Visibility Systems

*Source: From available sources on respective company websites as of 2020

AUTOMOTIVE CUSTOMER PRESENCE

50+ OEM Customers across Two Wheelers, Three Wheelers, Passenger Cars, Commercial Vehicles
Railway Segments and Engine Components



AUTOMOTIVE PRODUCT PORTFOLIO



CHASSIS

EMISSION
CONTROL

POWERTRAIN

SAFETY

THERMAL
MANAGEMENT


AUTOMOTIVE PRODUCT PORTFOLIO

- Chassis
- Safety

JOYSON ANAND ABHISHEK SAFETY SYSTEMS (JAAI)

JV: JOYSON SAFETY SYSTEMS, USA


SEAT BELTS,
AIRBAGS
& STEERING WHEELS



GABRIEL INDIA

TC: KYB CORPORATION, JAPAN;
YAMAHA MOTOR HYDRAULIC
SYSTEMS, JAPAN; KONI BV, THE
NETHERLANDS


SHOCK ABSORBERS,
STRUTS, FRONT FORKS,
GAS SPRINGS,
COOLANTS & BUSHKITS



HALDEX INDIA

JV: HALDEX, SWEDEN

SELF-SETTING AUTOMATIC BRAKE
ADJUSTERS, MANUAL SLACK
ADJUSTERS, CONDENSOR-CUM-
SEPARATOR, ABS & OTHER
AIR BRAKE PRODUCTS



MANDO AUTOMOTIVE INDIA

JV: MANDO CORPORATION, KOREA

HYDRAULIC BRAKES,
ELECTRIC POWER
STEERING SYSTEMS,
SHOCK ABSORBERS
and STRUTS



HENKEL ANAND INDIA

JV: HENKEL KGaA, GERMANY
TC: SUNRISE MSI CORPORATION,
JAPAN

SEALANTS, ADHESIVES,
COATINGS & NVH PRODUCTS



AUTOMOTIVE PRODUCT PORTFOLIO

- Emission Control
- Thermal Management

faurecia
inspiring mobility

FAURECIA CLEAN MOBILITY

JV: FAURECIA CLEAN MOBILITY,
FRANCE

EXHAUST MUFFLER ASSEMBLIES,
CATALYTIC CONVERTERS,
INSTRUMENT PANEL
REINFORCEMENT
ASSEMBLIES (IPRT)
& DOOR SIDE
IMPACT BEAMS (SIB)



MAHLE

MAHLE ANAND THERMAL SYSTEMS

JV: MAHLE GmbH, GERMANY

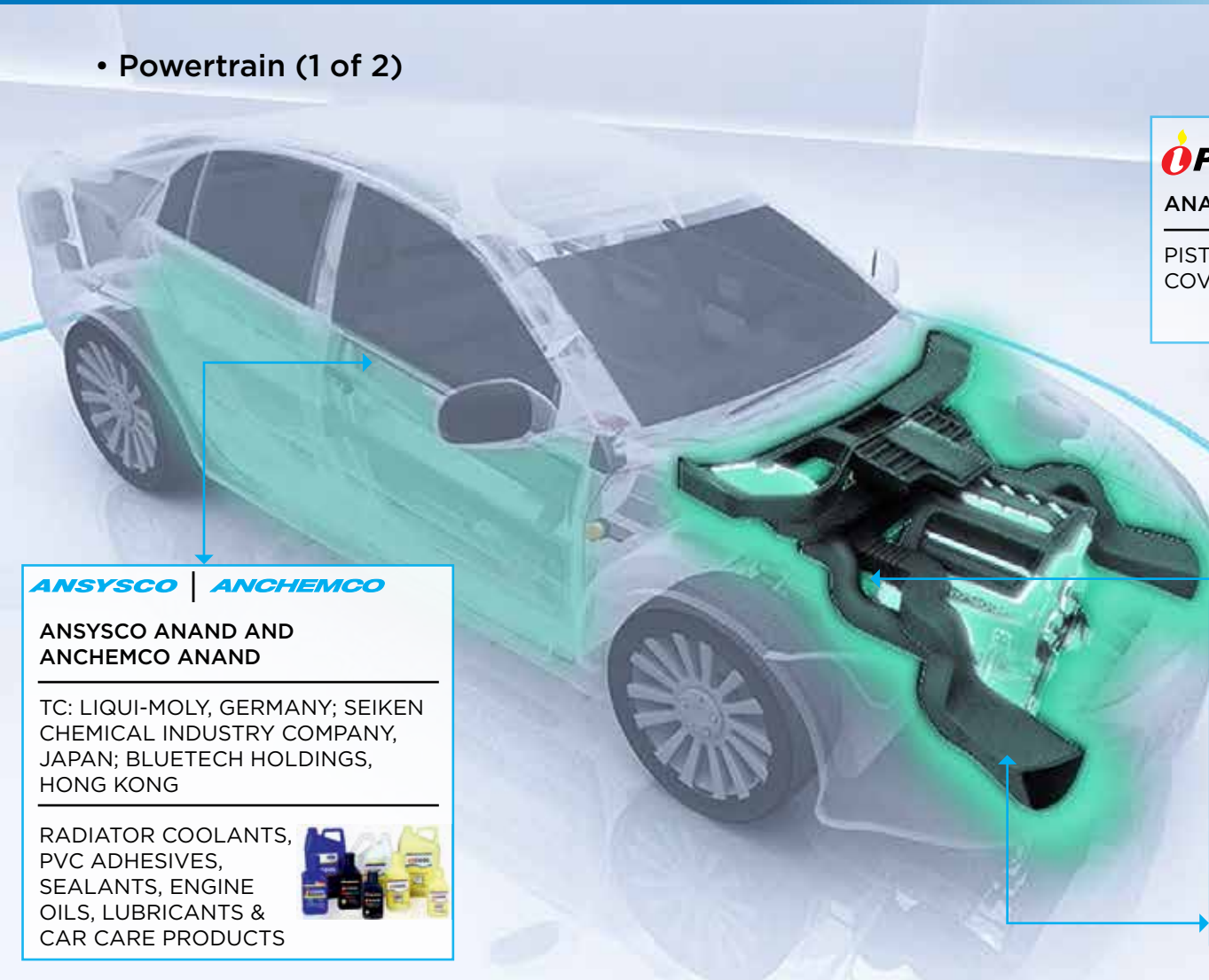
AIR CONDITIONING, ENGINE
COOLING SYSTEMS, VISCO FANS
& EXHAUST GAS RECIRCULATION
COOLERS



AUTOMOTIVE PRODUCT PORTFOLIO



• Powertrain (1 of 2)



I-POWER
ANAND I-POWER
PISTON RINGS & CAST IRON
COVERS/PLATES



ANSYS | ANCHEMCO
ANSYS ANAND AND
ANCHEMCO ANAND
TC: LIQUI-MOLY, GERMANY; SEIKEN
CHEMICAL INDUSTRY COMPANY,
JAPAN; BLUETECH HOLDINGS,
HONG KONG
RADIATOR COOLANTS,
PVC ADHESIVES,
SEALANTS, ENGINE
OILS, LUBRICANTS &
CAR CARE PRODUCTS

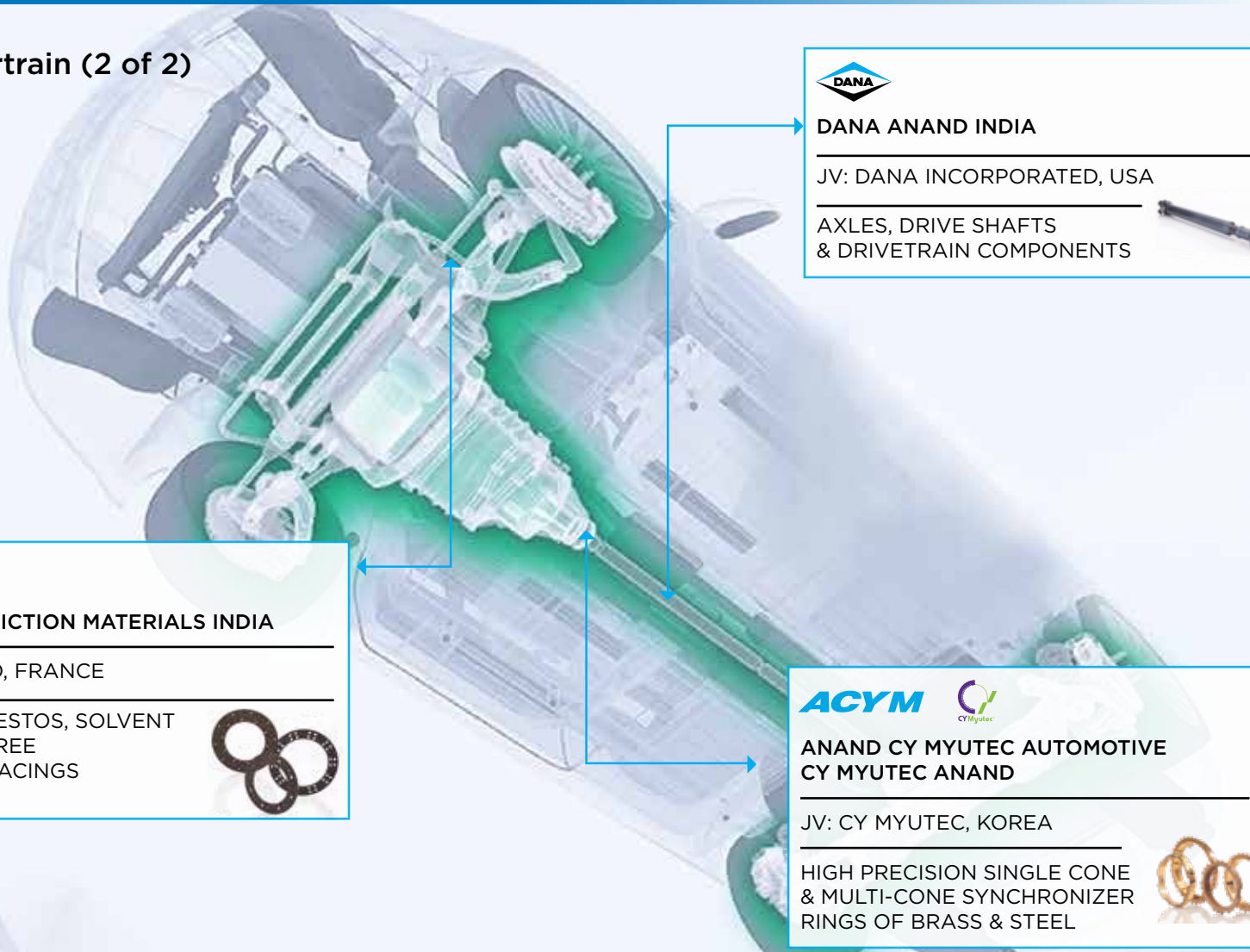


MAHLE
MAHLE ANAND FILTER SYSTEMS
JV: MAHLE GmbH, GERMANY
VALVE COVER MODULES, AIR
INTAKE MANIFOLDS SYSTEMS,
AIR CLEANER MODULES,
FUEL & OIL FILTER MODULES,
OIL MIST SEPARATORS & SPIN-ON
OIL FILTERS



AUTOMOTIVE PRODUCT PORTFOLIO

• Powertrain (2 of 2)



DANA ANAND INDIA

JV: DANA INCORPORATED, USA

AXLES, DRIVE SHAFTS
& DRIVETRAIN COMPONENTS



VALEO FRICTION MATERIALS INDIA

JV: VALEO, FRANCE

NON-ASBESTOS, SOLVENT
& LEAD-FREE
CLUTCH FACINGS



ANAND CY MYUTEC AUTOMOTIVE CY MYUTEC ANAND

JV: CY MYUTEC, KOREA

HIGH PRECISION SINGLE CONE
& MULTI-CONE SYNCHRONIZER
RINGS OF BRASS & STEEL



AUTOMOTIVE GABRIEL, THE FLAGSHIP COMPANY



- » Established in 1961, it is a publicly listed company
- » Total Revenue of INR 18699.62 Million & Profit before tax at 5.4% at INR 1002.70 Million during 2019-20
- » Market leader for pioneering Ride Control Products in India
- » 7 manufacturing plants and 4 satellite facilities with products ranging from Shock Absorbers, Struts, Front Forks, Seat Dampers, Cabin Dampers
- » Amongst the Top 10 suspension players globally
- » Strong R&D with over 75 patents filed till date in products and processes
- » Recognised by Great Place to Work® for 5th year in a row. Ranked 90th amongst 'India's Best Companies To Work For 2019'. Featured in Top 75 Best Workplaces for Women



TRANSFORMATIVE AND EXPERIENTIAL TRAVEL

S U J Á N



SUJÁN
Sher Bagh
RANTHAMBORE



SUJÁN
THE SERAI
JAISALMER



SUJÁN
JAWAI
JAWAI BANDH



Elephant
Pepper Camp
MASAI MARA
KENYA

SUJÁN GLOBAL RECOGNITIONS

SUJÁN has established itself on the global high-end luxury tourism scene and has won prestigious accolades.



"The heroes of travel for 2018—the brave, big-hearted and indomitably determined men and women who work all year around to make the world a better place, with inspiring results"



ACCOLADES

- Travel & Leisure SEA Editors Choice 2020
- Condé Nast Traveller Readers' Choice Awards for 2020
- The Vanity Fair, Travel Award 2020
- Condé Nast Traveller Gold list 2020
- Runner-up, Favourite Safari Lodge & Favourite Boutique Hotel in India by Condé Nast Traveller Readers' Travel Awards 2019
- Travel + Leisure India & South Asia India's Best Awards, 2018
- The Gold List - Condé Nast Traveler, 2018



BUSINESS DEVELOPMENT



AFTERMARKET



HUMAN RESOURCE



**OPERATIONS, EXCELLENCE IN
MANUFACTURING & SERVICES,
CORPORATE MATERIALS**



TECHNOLOGY & INNOVATION



**INTERNAL AUDIT, CORPORATE
FINANCE, TAX & LEGAL**



**CORPORATE
COMMUNICATIONS**



**CORPORATE SOCIAL
RESPONSIBILITY**



**MANAGEMENT &
GOVERNANCE**

» Customer Relationships

- Leveraging automotive industry network built across five decades
- Holding Customer Technology Days
- Conducting customer satisfaction surveys

» Business Intelligence

- Market intelligence & analysis – Market, Regulatory, Customers, Competitors
- Identifying new business opportunities

» Voice in the Industry

- Membership and representation in industry associations (ACMA, CII, FICCI, etc.)*
- Visibility in industry publications and presence in trade shows and exhibitions



AUTO EXPO 2016



AUTO EXPO 2018

*ACMA: Automotive Component Manufacturers Association of India
CII: Confederation of Indian Industry
FICCI: The Federation of Indian Chambers of Commerce and Industry

BUSINESS DEVELOPMENT CONNECTING WITH KEY CUSTOMERS



Technology Days and Auto Expo are an integral part of customer connect and branding for ANAND Group companies.



Auto Expo 2020



Auto Expo 2018



Tata Motors Tech Day 2018



Mahindra Electric Tech Day 2017



Mahindra Tech Day 2017



Maruti Suzuki Tech Day 2017



Daimler Tech Day 2016

» **Mrs. Anjali Singh**
Executive Chairperson, ANAND
Executive Chairperson, Gabriel India
Chairperson, Spicer India

- Executive Committee Member, ACMA
- Co-Chairperson, Northern Region Committee, ACMA
- Chairperson, Pillar 4 - Strategic Partnerships, ACMA
- Member, CII International Council
- Member, Governing Body of CII-CSM (VLFM) Initiative
- Member, India-Japan Business Leaders Forum (IJBLF)
- Executive Committee Member, Maruti Suzuki Suppliers Welfare Association (MSSWA)
- Member, Tata Motors Supplier Council



» **Mr. Rajeev Gera**
Member, ANAND Management Forum and
Sr. Vice President and Head - Group Business
Development and Group Corporate Materials

- Member, Northern Region Committee, ACMA
- Member, Pillar 1, ACMA
- Executive Committee Member, Honda Cars India Suppliers Club



BUSINESS DEVELOPMENT GARNERING CUSTOMER APPRECIATION



ANAND Group was conferred with the prestigious 'Business Partner of the Year-Automotive Division' award by Mahindra

Mando Automotive India received 'Mahindra Supplier Excellence Award' in 2 categories from Mahindra at their Supplier Meet



Gabriel India received 'Special Support' award at the Maruti Suzuki Vendor Conference

Mando Automotive India received Quality Excellence Award at the TATA Motors Annual Supplier Meet

MAHLE ANAND Thermal Systems received Cost Excellence Award at the TATA Motors Annual Supplier Meet



Mando Automotive receives 'Best Vendor in Localisation Award' from Hyundai Motor India

Gabriel India received Manufacturing Excellence in 'Theoretical Value Production' by Yamaha Motor Company at the Global Suppliers Conference

Spicer India receives 'Silver Award' from Ashok Leyland

Anchemco ANAND receives 'Best Supplier Award' from Tata Motors Genuine Parts

HUMAN RESOURCES

NURTURING AND GROOMING OF TALENT



OE Model - Pioneered the “Operating Engineer” Model, which has enabled ANAND locations being manned by educated work force and being union-free

- » **OE Model** - Pioneered the “Operating Engineer” Model, which has enabled ANAND locations being union free and also managed by educated workforce
- » **Developing Leadership from within** - Most of ANAND’s senior management today has grown within the Group
 - **At ANAND, every leader** is provided with the right platform to exhibit their true capabilities. Potential leaders across levels are groomed through the ANAND Leadership Development Programmes (ALDP) to become effective business leaders
 - **Talent management programmes** are supported through mandatory mentoring and coaching programmes
- » **World of Opportunities** - ANAND people are sent overseas for training to JV partner



locations and renowned universities like Oxford University

- » **Career Mobility** - Cross-fertilisation of skills and growth opportunities across ANAND companies and JV Partners
- » **Hiring Talent** - We hire talent from premium institutes

HUMAN RESOURCES EMPOWERING A DIVERSE WORKFORCE



Employing women on the shop floor

- » ANAND strongly believes in the empowerment of women
- » We are an equal opportunity employer
- » Some locations have up to 95% women on the shop floor
- » Accommodation facilities and amenities provided to encourage women to seek employment

Widespread reach and diverse workforce

- » With presence in 59 locations across India, ANAND employs talent from diverse backgrounds and geographies
- » It is this diversity that supports our basic ethos of inclusive growth, reflected across management levels



HUMAN RESOURCES

DEVELOPING RESOURCES THROUGH ANAND U



- » 'ANAND U' is the ANAND Corporate University that meets the HR development needs of Group companies
- » ANAND U has been contributing towards people development since 1991
- » ANAND U offers training support and guidance through three academies
 - Leadership Academy
 - Operational Excellence Academy
 - Development Academy
- » It is focused on four major areas of people development: Operational Excellence, Talent Development, Technical Interventions and Development of Operating Engineers
- » Training modules
 - Classroom for face to face learning
 - E-learning
 - Engaging with internal and external faculty

“BUSINESS IS 90% PEOPLE”

MR. DEEP C. ANAND



PURSuing EXCELLENCE IN MANUFACTURING AND SERVICES

- » **Visionary Leaders For Manufacturing (VLFM)** - VLFM programme was started by CII in partnership with Japan International Co-operation Agency (JICA). Through VLFM, ANAND Senior Managers are given unique leadership perspectives. (Around 100 managers trained in VLFM since 2007)
- » **Visionary Small And Medium Enterprises (VSME)** - VSME is a programme under the VLFM umbrella, focused on Tier 1 and Tier 2 suppliers. It aims to achieve a win-win relationship between customers and suppliers and also to improve manufacturing (quality, cost, delivery) of suppliers. (Dedicated teams of ANAND engineers has helped around 500 suppliers since 2009)
- » **ANAND House of Quality Culture (AHQC)** - Groupwide initiative to improve quality in all that we do
- » **ANAND Heijunka Production System (AHPS)** - Moving plants from traditional manufacturing to world class practices
- » **Specialised Training for Operating Engineers (STOE)** - 15 % OEs trained through various technical training programmes to specialize in areas of interest e.g. maintenance
- » **Safety** of all employees is of paramount importance across all Group companies



CORPORATE SOCIAL RESPONSIBILITY HAVING AN IMPACT IN COMMUNITIES NEAR-BY



SNS Foundation (SNSF), the CSR arm of the ANAND Group was founded in April 1976.



EDUCATION

- Engaged with 100+ partner schools in eight states
- Impacted 1.75 lakh school students with inputs of better teaching and infrastructure
- 250+ MEDHAVI scholarship awardees in 13 polytechnics in seven states
- 100+ government school students secured state scholarships through SNSF organised coaching

SKILL DEVELOPMENT

- 17 NSDC aligned training programmes spanning 10 trades
- 14 training centres in six states
- 35,000+ trained youth (70% females)
- 70% placement success rate
- 600+ individuals developed as entrepreneurs



HEALTH & HYGIENE

- Key areas - HIV/ AIDS, Reproductive & Child Health and Industrial Health
- Addressed health needs of 7.5 lakh underserved population
- Implementation partner for National Health Mission initiatives
- 2018: Introduced mobile health services for unserved population in four villages of Jawai, Rajasthan

COMMUNITY CONSERVATION

- Key areas - Rural Development and maintenance of green environs
- Facilitated Rs. 140 MINR micro credit for 850+ self-help groups
- Regular maintenance of 3 public parks (Himachal Pradesh and Haryana)
- At Rajasthan:
 - › 100 sq. km of wilderness protected
 - › 3241 households benefit from sanitation programme
 - › Healthcare for 90K+ livestock
 - › 59 individual leopards identified between 2013-20



- » **Ethics** - Ethics forms a very important component of ANAND Group's belief and its practices. Employees, suppliers and vendors are encouraged and guided to maintain the highest level of ethical practices
 - Group Ethics Committee
 - Anonymous hot line facility through Integrity Matters
- » **Prevention of Sexual Harassment** - This is taken very seriously at ANAND. A committee oversees activities related to educating employees and evaluating complaints
- » **360 Degree Feedback** - ANAND is well known for its practice of transparency and formal feedback. It was one of the first companies to establish 360 degree feedback across all levels
- » **Open Discussions** - We encourage open discussions and dialogue as the main means to sort out differences and improve functioning

ANAND CODE OF CONDUCT





We Drive ANAND as a UNIFIED CORPORATE ENTITY

We ASPIRE to be a WORLD-CLASS organisation

We ENCOURAGE organisational transparency

We Value INTEGRITY

We Encourage INNOVATION

We Nurture TALENT

We Support continuous EDUCATION

We Build TRUST and EMPOWER PEOPLE

We PRACTICE open and HONEST COMMUNICATION

We RECOGNISE and reward ACHIEVEMENT

We Are an EQUAL opportunity employer

We Are committed to SOCIAL RESPONSIBILITY



DRIVING WITH YOU SINCE 1961

