

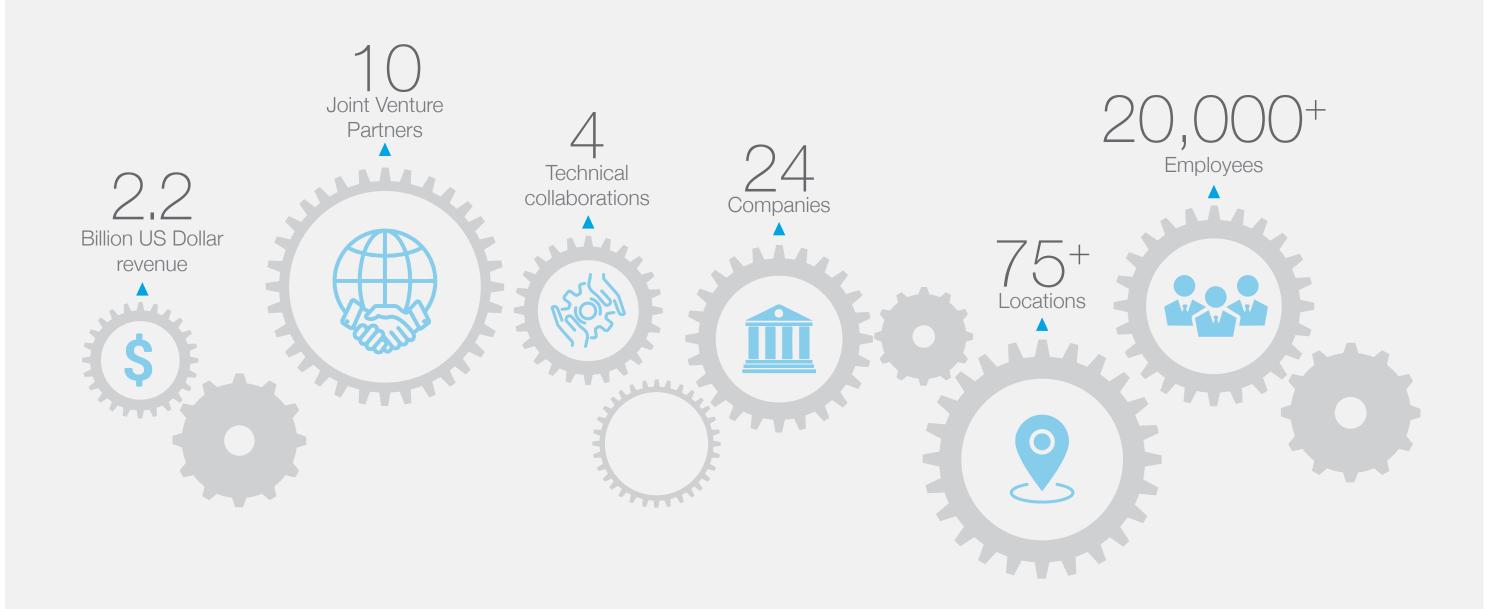
# LEADING PLAYER ACROSS THREE BUSINESS SEGMENTS



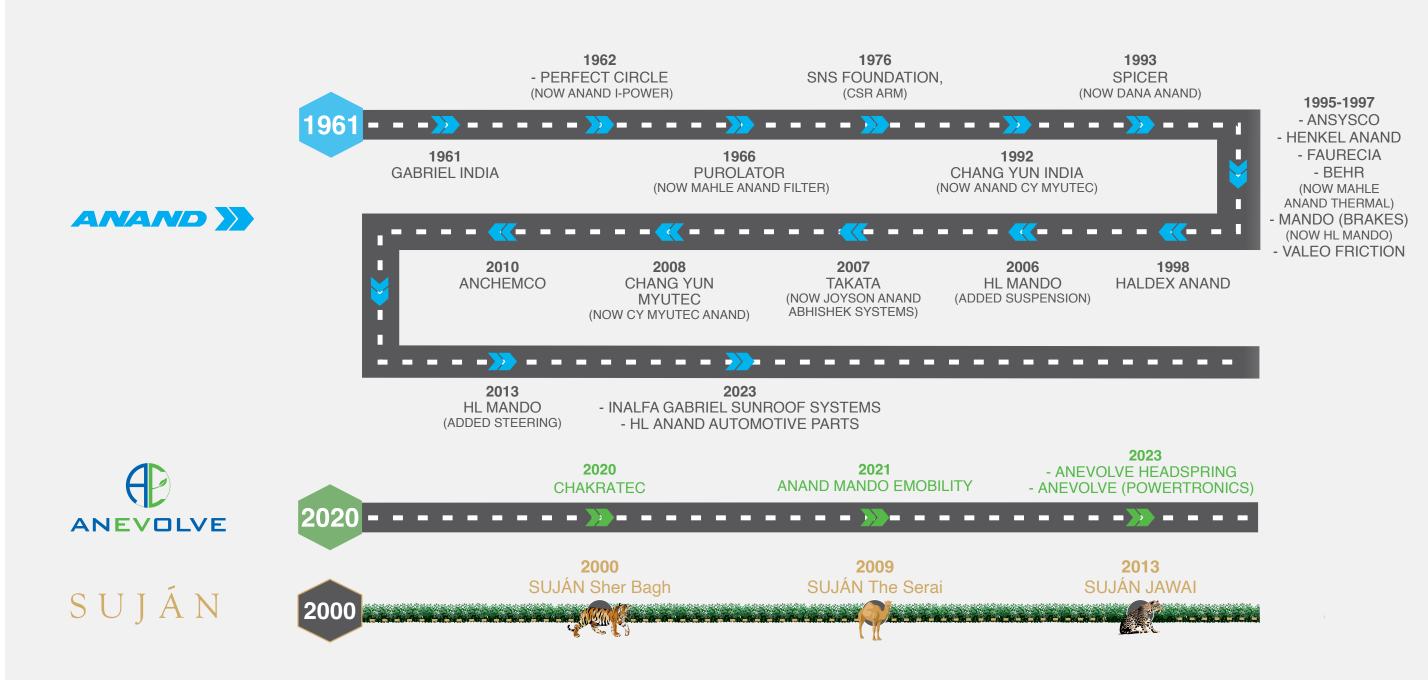




# FACTS AT A **GLANCE**



## SIX DECADES+ OF **BUILDING TRUST**



## LEADING THROUGH STRONG GOVERNANCE





**Anjali Singh** Chaiperson & Managing Trustee DCA Foundation

### **Deep C Anand Foundation**



Kiran D. Anand Trustee



Jaisal Singh Trustee



Rohit Arora Trustee



Lorenzo Piaget Trustee



Deepak Chopra Trustee



**Anjali Singh** Executive Chairperson, Group Supervisory Board Executive Chairperson, ANAND & Gabriel India Chairperson, Dana Anand India Member, PC & OC

### **Group Supervisory Board**



Jaisal Singh Co-Chairman, HL Mando Anand India Chairman, ANEVOLVE Chairman, SUJÁN Member, PC & FARC



Rohit Arora Founder & Chairman, Silverskills Member, PC & FARC



Jean-Louis Chaussade Chairman, JLCH Conseil, Paris



Lorenzo Piaget Partner. Piaget & Associés Member, FARC



Tejpreet Chopra President & CEO. **Bharat Light Power** Member, OC & FARC



Deepak Chopra Co-Chairman, Jovson ANAND Abhishek Safety Systems Member, PC & OC



Jaisal Singh Vice Chairman



**ANAND Executive Board** 



Mahendra K. Goyal Group President & Chief Executive Officer



Sunil Kaul Group President & Chief Technology Officer, Vice Chairman, ANEVOLVE



Jagdish Kumar Group President & Chief Financial Officer



Sumit Bhatnagar Group President, Managing Director, ANEVOLVE



S. Sarathi Group President & Chief Assurance Officer

Committees of the Group Supervisory Board — OC: Operations Committee I PC: Personnel Committee I FARC: Finance, Audit and Risk Committee

## DRIVING THE **FUTURE SUSTAINABLY**



### Vision:

To Create
Value Sustainably
Through Pursuit of
Excellence and
Good Governance



BE THE FIRST CHOICE FOR CUSTOMERS



BUILD & SUSTAIN STRATEGIC PARTNERSHIPS



OPERATE IN AN
ENVIRONMENTALLY
RESPONSIBLE MANNER



STRENGTHEN
CORPORATE
GOVERNANCE &
CITIZENSHIP



CREATE INSPIRED
LEADERSHIP & PROMOTE
ENTREPRENEURIAL
SPIRIT



ASPIRE & DARE TO BE INNOVATIVE



ATTAIN LEADERSHIP IN TECHNOLOGY



DEVELOP, EMPOWER & GROW PEOPLE



FOSTER INCLUSION, EMBRACE DIVERSITY & PROMOTE EQUITY



EXECUTE WITH
EXCELLENCE & LEAD
THROUGH QUALITY



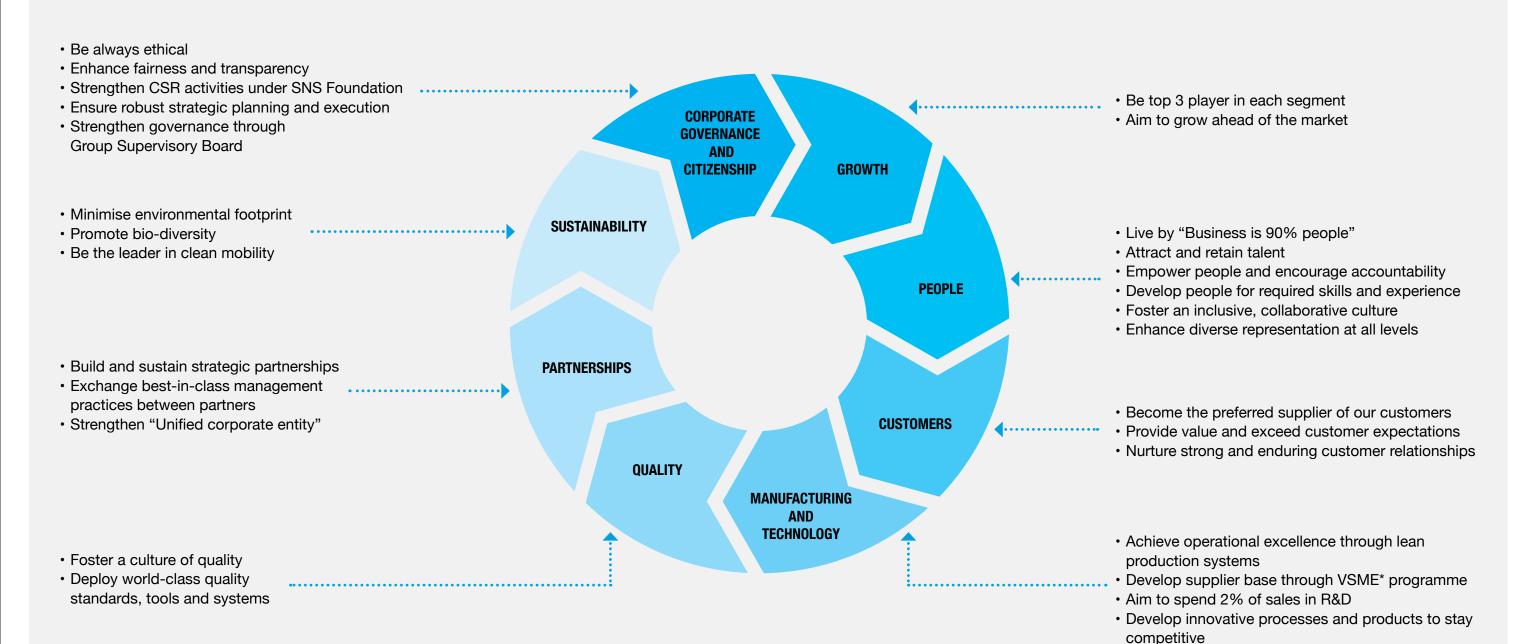
ACHIEVE SUPERIOR BUSINESS PERFORMANCE & GROWTH



NURTURE & ENHANCE BRAND VALUE

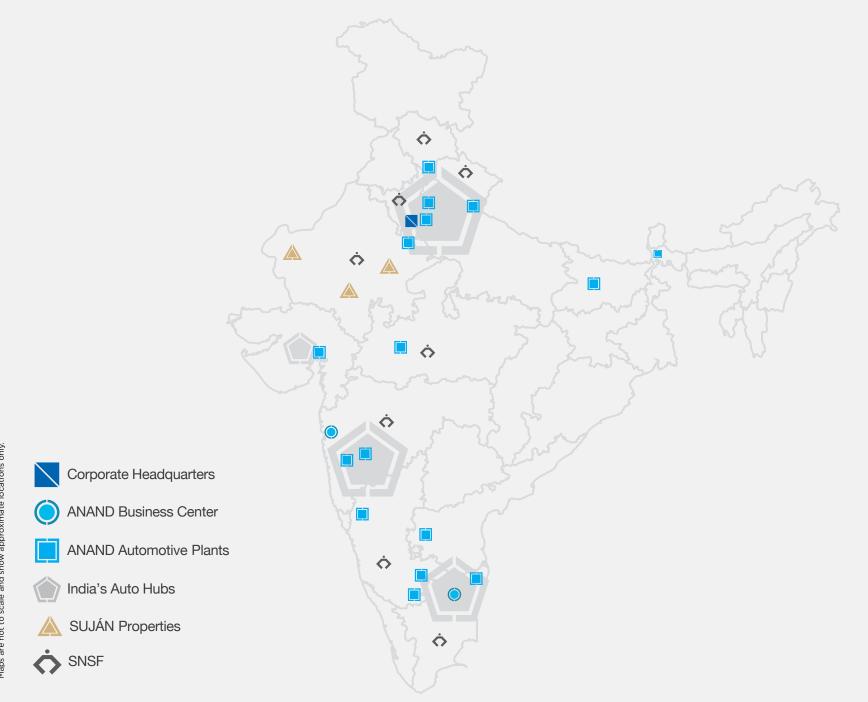
### BELIEFS & BUSINESS PHILOSOPHIES



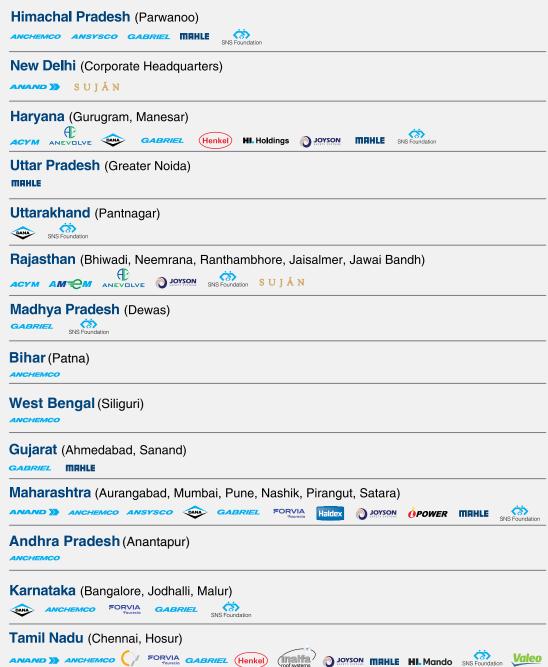


\*VSME: Visionary Small and Medium Enterprise

# BEING CLOSE TO CUSTOMERS



### Present across 14 states in India



# **OUR PARTNERS**

#### JOINT VENTURE PARTNERS

CY Myutec, Korea Dana Incorporated, USA Forvia Clean Mobility, France Haldex AB, Sweden Henkel KGaA, Germany Headspring, Japan HL Mando, Korea Joyson Safety Systems, USA MAHLE GmbH, Germany Valeo. France

\*\*Revenue and employee count is of SAF Holland (parent company of Haldex)

#### ★ TECHNICAL COLLABORATIONS

KONI BV, The Netherlands KYB Corporation, Spain/ Japan Inalfa Roof Systems, Netherlands Yamaha Motor Hydraulic Systems, Japan





Employees: 41,800+



#### **FORVIA**

Revenue: US\$ 29.5 Bn Employees: 1,50,000+

#### **Valeo**

Revenue: US\$ 23.8 Bn Employees: 1,12,700+



Revenue: US\$ 1.5 Bn Employees: 4,900+



Revenue: US\$ 5 Bn Employees: 43,000+







Revenue: US\$ 2.3 Bn\*\* Employees: 5,900+\*\*





Revenue: US\$ 85.5 Mn Employees: 500+

#### **HL** Mando

Revenue: US\$ 6.4 Bn Employees: 14,000+





Employees: 40

















KYK\*

Revenue: US\$ 23.3 Bn Employees: 47,700+

#### MAHLE

Revenue: US\$ 13.9 Bn Employees: **72,300+** 

## AUTOMOTIVE CUSTOMER PRESENCE

























































































































and many more...









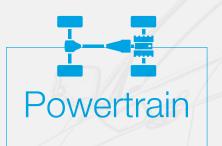


# AUTOMOTIVE PRODUCT PORTFOLIO















# AUTOMOTIVE PRODUCT PORTFOLIO CHASSIS







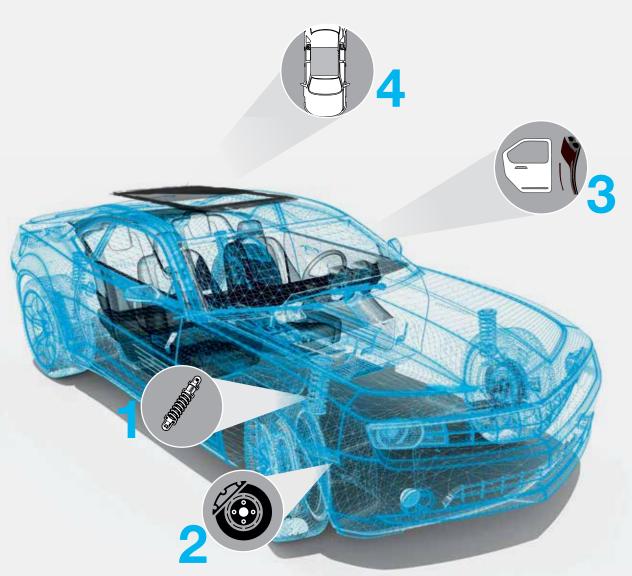


### **GABRIEL**

#### **GABRIEL INDIA**



- Struts
- Dampers
- Front Forks
- E-Assisted Adjustable Shock Absorbers
- Semi Active Suspensions
- Frequency Selective Dampers (FSD)
- Inverted Front Forks (IFF)
- Cabin Dampers- Railway Dampers







#### **HENKEL ANAND INDIA**

- Reinforcement Structural Pads
- Structural Adhesives
- Stiffening Foams
- Sealants & Coatings
- Anti Flutter
- Sealing Tapes & Pillar Fillers
- Anti-Vibration Pads
- Direct Glazing Adhesives





## **HL** Mando **HL MANDO ANAND INDIA**



- Master Cylinder & Booster
- Caliper Brake
- Drum Brake
- Rack Electric Power Steering System
- Column Electric Power Steering System
- Manual Rack & Pinion (Steering Gear Box)
- Suspension Strut Assembly
- Suspension Shock Absorber Assembly





#### **INALFA GABRIEL SUNROOF SYSTEMS**

- Bottom Loaded Top Slider (BLTS)
- Tilt Vent Slider (TVS)



# AUTOMOTIVE PRODUCT PORTFOLIO F POWERTRAIN

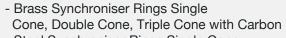






### ACYM

#### **ANAND CY MYUTEC AUTOMOTIVE**



- Steel Synchroniser Rings Single Cone, Double Cone with Carbon
- Dog Gears- Aluminium Forged and Machined Parts



### **OPOWER ANAND I-Power**

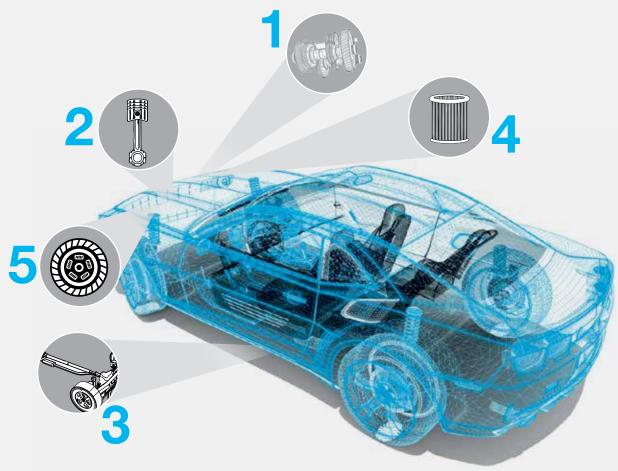
- Piston Rings
- Clutch Pressure Plates
- Slack Adjusters
- Differential Housings
- Wheel Hubs
- SG and Grey Iron Castings



### MAHLE **MAHLE ANAND** FILTER SYSTEMS



- Air intake systems/ Fuel Filter Modules/ Oil Filter Modules
- Cylinder Head Covers
- Air Intake Manifolds
- Carbon Cansiters
- Cabin Air Filters
- Oil Cooler/ Hear Exchangers
- Oil Mist Separator for ICE





#### CY MYUTEC ANAND

- High Precision Single Cone Synchroniser Rings
- Multi-Cone Synchroniser Rings of Brass & Steel







- Axles
- Drive Shafts
- Drivetrain Components





# Valeo

#### **VALEO FRICTION MATERIALS INDIA**

- Clutch Friction Material
- Brake Friction Material
- Friction Washer



## AUTOMOTIVE PRODUCT PORTFOLIO SAFETY ( EMISSION CONTROL











### **ANCHEMCO ANSYSCO**





- Diesel Exhaust Fluid AdBlue
- Coolants- Brake Fluids
- Filter Compounds (PVC & PU Adhesives)
- Car Care Products



### **FORVIA**

faurecia

#### **FAURECIA EMISSIONS CONTROL TECHNOLOGIES INDIA**



- Catalytic Converters
- Diesel & Gasoline Particulate Filters
- Selective Catalytic Reduction (SCR)
- Silencers/Muffers- Ammonia Storage & Delivery System (ASDS)
- Exhaust Heat Power Generation (EHPG)
- Exhaust Heat Recovery System (EHRS)
- Acoustic Valves



# Haldex

#### **HALDEX ANAND INDIA**

- Self-Setting Automatic Brake Adjusters
- Mannual Slack Adjusters
- Consep (Electric & Pneumatic)
- Trailer Air Suspension Kit with Lift Axle
- Trailer ABS/EBS Kit
- Trailer Brake Kit
- Levelling Valve
- Disc Brakes
- Brake Chamber & Actuator











#### - Seat Belts

- Air Bags
- Steering Wheel
- Integrated Safety Solutions

**ABHISHEK SAFETY SYSTEMS** 





# MAHLE

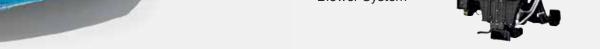
#### **MAHLE ANAND** THERMAL SYSTEMS

- HVAC System
- Exhaust Gas Re-circulation Valve (EGR)
- Integrated Charge Air Cooler (iCAC)
- Engine Cooling Module (Radiator with Fan Motor Shroud)
- Visco Clutch
- Blower System









# AUTOMOTIVE PRODUCT PORTFOLIO







- E-Axles for BEV & Hybrids





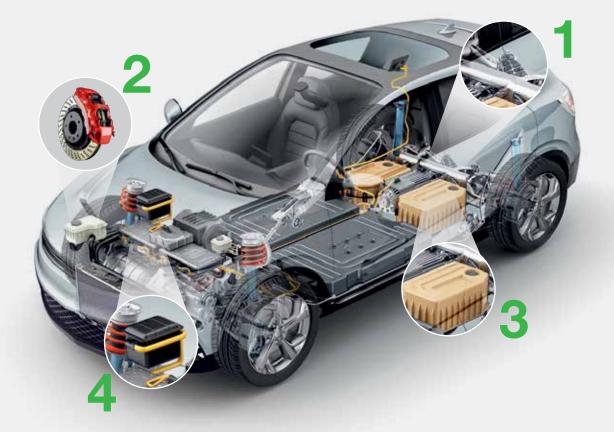
- Electro Mechanical Braking (EMB)





- Integrated Dynamic Brake (IDB)
- MOC (EPB Electric Parking Brake)







- i-Condensors
- e-Compressors
- Climate Control Module (CCM)
- PTC Heater
- Chiller Unit
- Electronic Expansion Valve (eXV)
- Battery Cooling Box
- Battery Cooling Plate





- Liquid Management Module for Electric Vehicle (OGA)
- Water Jackets for Inverter Box
- Lean Module Covers for Battery Packs
- Active Oil Mist Separator for H2 ICE (HPI)
- Humidifier for FCV
- Exhaust System for FCV



# GABRIEL INDIA, THE FLAGSHIP COMPANY



# GABRIEL

- · Established in 1961, a public listed company
- Pioneer of Ride Control Products in India with state-of-the-art integrated operations
- Strong R&D focus, employing 72 specialists, highest in the industry
- Revenue ₹33.4 Bn, as compared to ₹29.7 Bn in FY22-23 (YoY 12.5%)

10 Manufacturing Plants

Sales Across

25

Countries

79 Patents Filed

4600+
Employees

#### Number 1 Brand in Aftermarket Leadership with market share of >31% FY 2024, in India

# Long-Standing Client Relationships

Only company in suspension with meaningful presence across all vehicle segments: 2-3W, PC, CV and Railways Segments



### **Technology Centres**

- 1. Technology Centre Four Wheelers & Commercial Vehicles, Chakan
- 2. Technology Centre Two Wheelers Advance Suspension Technology, Hosur
- 3. Gabriel Europe Engineering Centre, Belgium







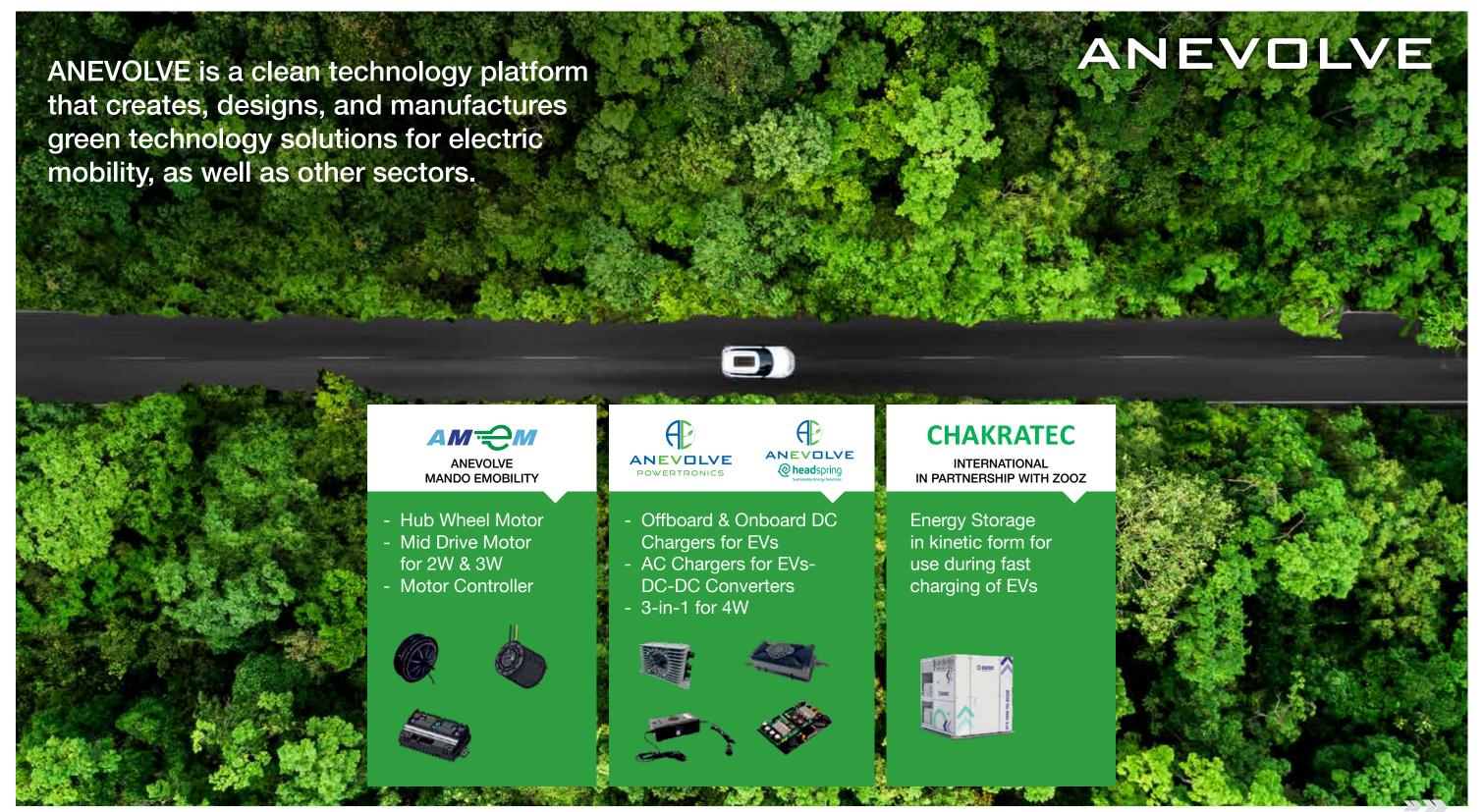






MARUTI SUZUKI VENDOR CONFERENCE 2024





# SUJÁN

# TRANSFORMATIVE AND EXPERIENTIAL TRAVEL









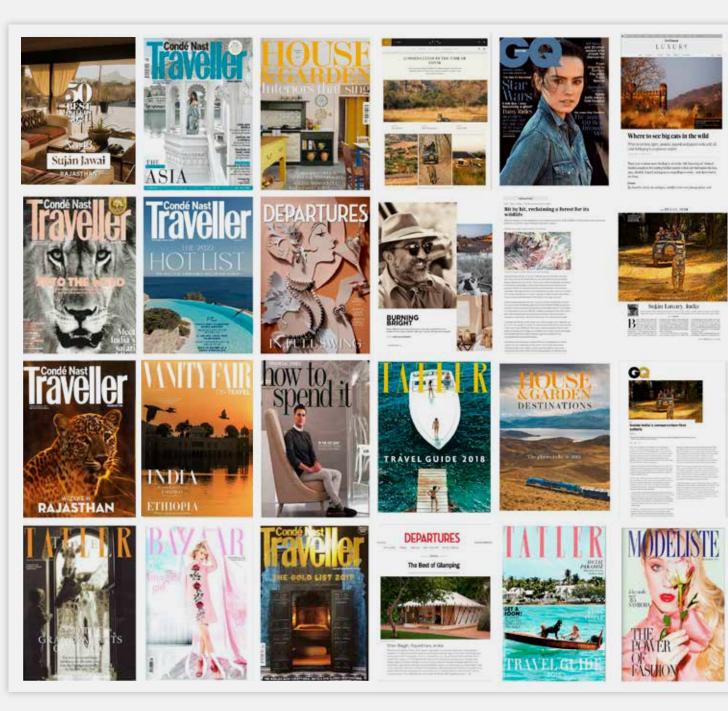




# SUJÁN GLOBAL RECOGNITIONS

SUJÁN

SUJÁN has established itself on the global highend luxury tourism scene and has won prestigious accolades.



- SUJÁN JAWAI ranked No. 43 in the The World's 50 Best Hotels 2024
- Tatler Best Honeymoons in the World 2023
- Tatler Best Spas in the World 2023
- Elite Traveller Top 50 ECO Suites 2023
- 10 Best Luxury Holidays for 2023 CNT Readers Choice Best Boutique Hotels in India 2023
- Condé Nast The 10 Best Family Holidays in the World 2023, 2024
- Country Life UK: The Best Safari Lodges in the Globe right now, 2022
- The Most Beautiful Eco Hotels in the World 2023
- Condé Nast Traveller (CNT) Gold List 2023
- The Telegraph: Best Holidays for Wildlife Lovers 2023
- Afar: The World's 15 Best Glamping Sites 2023
- Departures Magazine: A Conservation Tourism
   Project Like No Other 2023
- Condé Nast Readers Choice Best Hotels in India 2022
- CNT Hot List 2022: Best Newly Designed Hotels in the World

# ANAND GROUP **CORPORATE**











BUSINESS DEVELOPMENT AFTERMARKET HUMAN RESOURCES & ANAND U TECHNOLOGY & INNOVATION









**GROUP COMMUNICATIONS** 

CORPORATE SOCIAL RESPONSIBILITY

MANAGEMENT & GOVERNANCE

**INFRASTRUCTURE & SUSTAINABILITY** 









INTERNAL AUDIT, FINANCE, TAX & LEGAL

INFORMATION TECHNOLOGY

EXCELLENCE IN MANUFACTURING, CORPORATE MATERIALS

**GROUP STRATEGY** 

### **BUSINESS DEVELOPMENT**



#### **CUSTOMER RELATIONSHIPS**

- Leveraging automotive industry network built across six 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, SIAM, etc.)\*
- Visibility in industry publications and presence in trade shows and exhibitions













CII HARYANA STATE ANNUAL SESSION 2023-24



















# **BUSINESS DEVELOPMENT** CONNECTING WITH KEY AUTOMOTIVE CUSTOMERS



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





ANAND TECHNOLOGY DAY FOR MSIL 2023







AUTO EXPO 2023 INAUGURATION



**BHARAT MOBILITY 2024** ANEVOLVE TECHNOLOGY DAY FOR HERO 2024



# BUSINESS DEVELOPMENT GARNERING CUSTOMER APPRECIATION





MARUTI SUZUKI VENDOR CONFERENCE 2024



TATA MOTORS ANNUAL SUPPLIER CONFERENCE 2023



MAHINDRA ANNUAL SUPPLIER CONFERENCE 2024

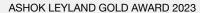


**HYUNDAI VENDOR CONFERENCE 2024** 



SUZUKI MOTORCYCLE INDIA ANNUAL SUPPLIER CONFERENCE 2024







TATA MOTORS ANNUAL SUPPLIER CONFERENCE 2024

# HUMAN RESOURCES NURTURING AND GROOMING OF TALENT

**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 -

- ANAND Leadership Development Programme (ALDP) is a 18-month programme for high-potential leaders
- Human Capital (HC) Programme identifies talent for development at junior/midmanagement levels

#### Talent management programmes -

- Coaching & Mentoring structured programmes for senior leaders and ALDP participants
- Sponsored Higher Education & Training partnerships with premier Indian institutes (IIM, ISB, XLRI) for customised programmes

#### World of Opportunities -

- ANAND people are sent overseas for training at JV partner locations
- Overseas Education opportunities for senior leaders at top global universities (Oxford, MIT, INSEAD)

**Career Mobility -** Cross-fertilisation of skills and growth opportunities across ANAND companies and JV Partners

#### Diversity and Inclusivity: Foundational to our culture -

- With presence in >60 locations across India, ANAND employs talent from diverse backgrounds and geographies
- Provides accommodation facilities and other amenities to encourage women seek employment













# 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





# EXCELLENCE IN MANUFACTURING (EIM)



EIM drives & supports specialised excellence initiatives to develop world-class manufacturing standards and services across group companies

### Leadership & **Technical Skilling**



- Visionary Leaders For Manufacturing (VLFM) programme was started by CII in partnership with the Japan International Cooperation Agency (JICA)
- Under the VLFM Umbrella, Visionary Small And Medium Enterprises (VSME) aims for win-win ties between customers and suppliers and to improve manufacturing processes of suppliers (quality, cost, delivery)
- Through VLFM, ANAND Senior Managers are given unique leadership perspectives
- Around 100 managers trained in VLFM since
- Dedicated teams of ANAND engineers have helped around 600 suppliers since 2009

### **Future Ready**



- Elevating skills in Industrie 4.0 (emerging technologies) via Artificial Intelligence (AI) & Machine Learning (MI) since 2021
- 75 personnel trained or undergoing training
- ANAND Visual Management Enabling integrated, digital & paperless factories via Industrie 4.0 applications
- Initiated design and deployment of Industrie 4.0 systems across ANAND

#### **Zero Defects**



- ANAND House of Quality (AHQ) -Groupwide initiative to improve quality in multiple areas
- Application of Six Sigma for Zero Defect Product launches via design for Six Sigma and defect elimination.
- Over 150 trained & certified belts

### Manufacturing Excellence



- ANAND Heijunka Production System (AHPS)- Moving plants from traditional manufacturing to world- class practices
- Cost of Quality- Preventive & holistic approach to reduce or eliminate Cost of Quality
- Safety of all employees is vital for all Group companies

# ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG)



Governance is deeply anchored in safety, integrity, quality, and inclusivity. It is also premised on the belief that ethics is not a goal but a lived practice. By continuously cultivating a culture of trust, excellence, learning, and equity, we ensure our governance practices are rooted in values yet dynamic enough to meet changing needs.

Anjali Singh
Executive Chairperson,
ANAND Group



Sustainability is fundamental to the way we do business across business segments, functions, and to activities related to CSR, philanthropy, or conservation. Whatever we do, we always keep an eye on the planet—from renewables to advanced technologies to cutting waste to planting trees and water harvesting.

### Jaisal Singh

Vice Chairman, ANAND Executive Board Chairman, ANEVOLVE





Miyawaki Forests



Energy Management Systems (EMS)



High-Rate Transpiration System



Check Dam



Wind Turbine



Refurbishment of Dug Wells



Open Space Reservation (OSR)



Potable Organic Waste Composters(OWC)

### CORPORATE **SOCIAL RESPONSIBILITY**



SNS Foundation (SNSF) was established in 1976 as the ANAND Group's CSR arm. Aligns with the United Nations' Sustainable Development Goals (SDGs). Aims to transform lives and promote environmental conservation.

### Focus Areas

### **Education & Diversity**



- 100+ partner schools in eight states
- Impacted 3.44 lakh school students, 50% female students
- 680+ scholarships awarded to females for 3-year diploma engineering
- 150+ government school students secured state scholarships

### Skill Development



- 42,000+ trained youth (70% females)
- 70% placement success rate
- 600+ individuals groomed as entrepreneurs
- Key focus on employability of persons with speech and hearing impairment
- Females trained in male-dominated trades of plumbing and two-wheeler auto technician

### Health & Hygiene



- Addressed health needs of 27 lakh rural population
- Implementation partner for National Health Mission initiatives
- Key areas: HIV/AIDS, Reproductive & Child health, and Industrial health
- Mobile medical services

# Community & Wildlife Conservation



- Facilitated ₹140mn micro credit for 1000+ Self Help Groups
- In Rajasthan:
- 100 sq.km. of wilderness protected
- 15k households benefit from sanitation services
- Healthcare for 1.2L+ livestock
- 60 individual leopards identified between 2013-20

# MANAGEMENT & GOVERNANCE PURSUING ORGANISATIONAL TRANSPARENCY



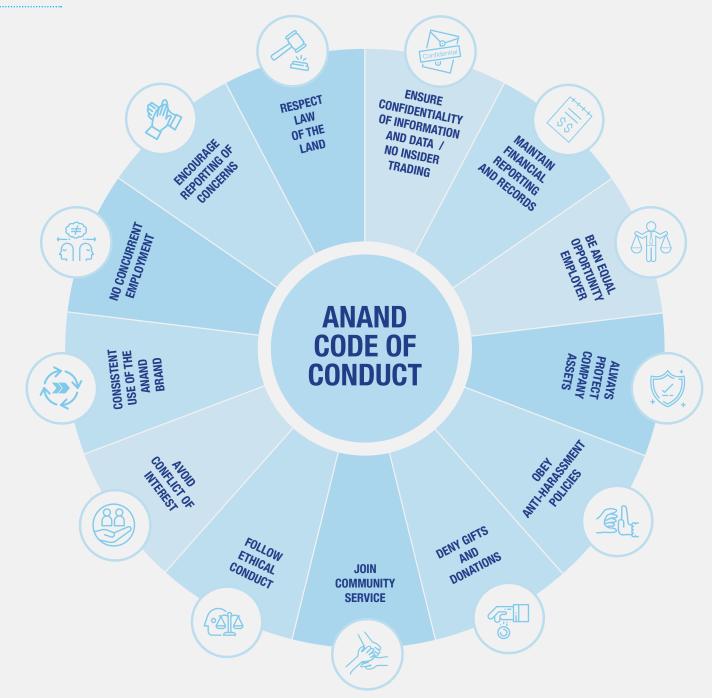
**Ethics** - Ethics forms a very important component of ANAND Group's belief and its practices. Employees, suppliers and vendors are encouraged and guided to maintain the highest level of ethical practices

- Group Ethics Committee
- Anonymous hot line facility through Integrity Matters

Inclusive work environment - Ensuring a safe, diverse, and supportive workplace for all employees. Any inappropriate behaviour is taken very seriously by a group-level internal committee, which is responsible for educating employees and evaluating any complaints fairly, comprehensively and in a timebound manner

**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

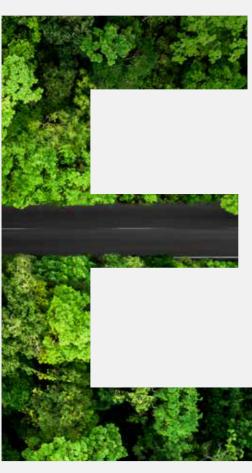
**Open Discussions** - Encourage open discussions and dialogue as the main means to sort out differences and improve functioning



### LIVING THE **ANAND WAY**







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

We Embrace SUSTAINABILITY



