



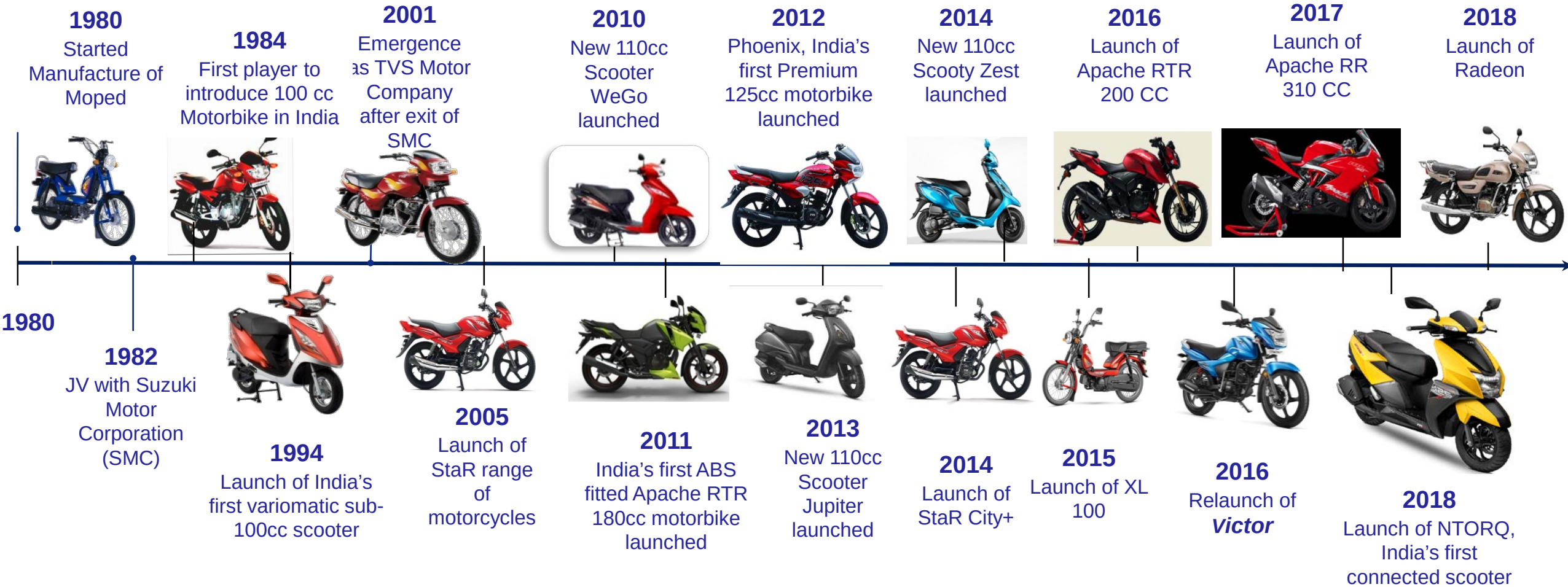
TVS Motor – In the fast lane

Gearing for greatness



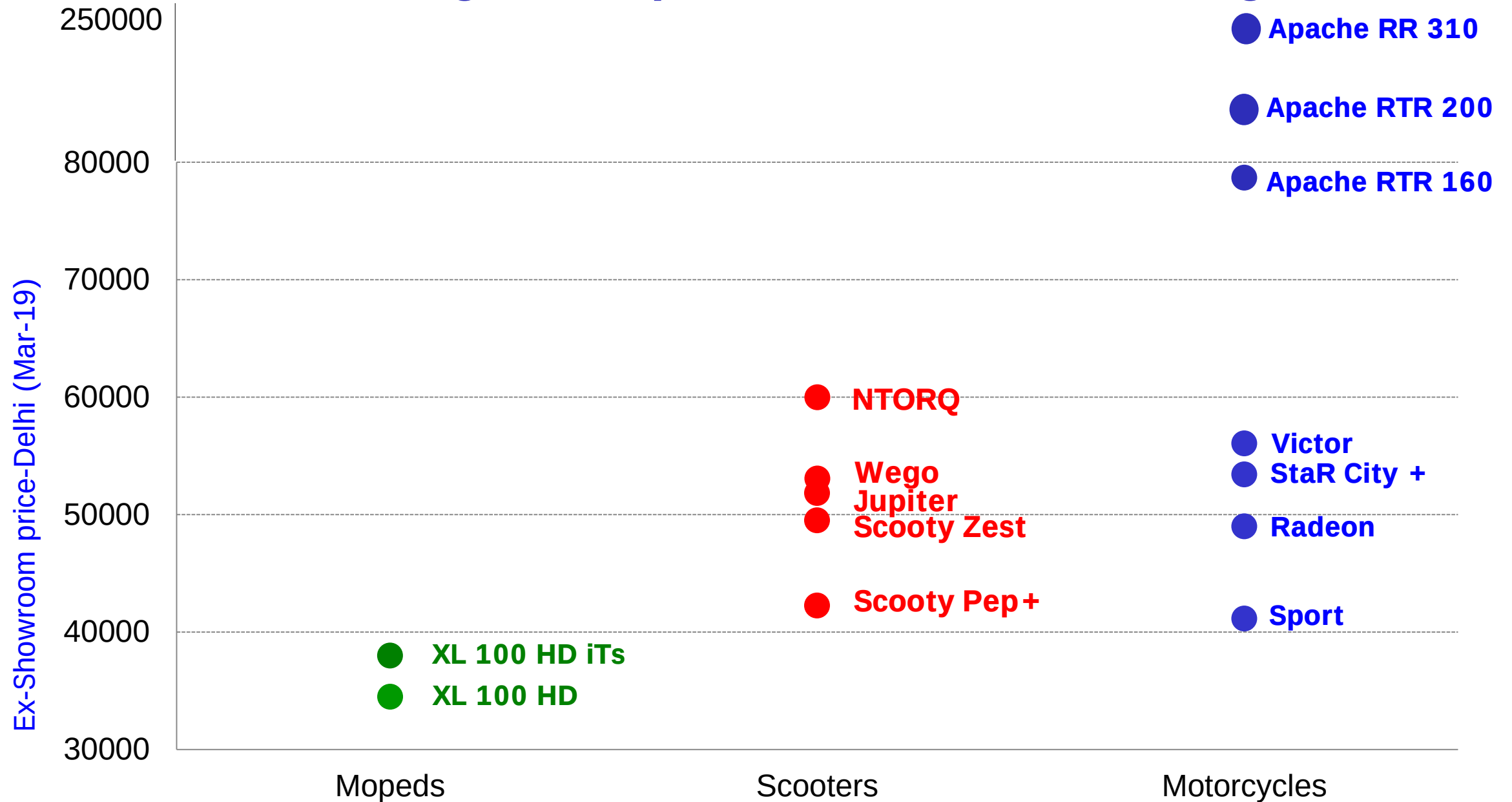
- ❑ One of the largest two and three wheeler companies
- ❑ State of the art manufacturing plants located in Karnataka, Tamil Nadu, Himachal Pradesh and Indonesia
- ❑ Capacity Dec 2018 - 5.0 Million Two Wheelers
2.0 Lakhs Three Wheelers
- ❑ Strong world class in-house R & D
- ❑ Robust supplier base
- ❑ Extensive sales & service network
- ❑ Total Revenue 2017-18 (excluding excise duty) : Rs. 15,274 Cr.
- ❑ PAT 2017-18 : Rs 663 Cr.

TVS Motor – Shaping Indian Two Wheeler Industry since 1980





- ❑ Customer centric two wheelers with innovative features
- ❑ Focus on quality
- ❑ Complete portfolio
- ❑ Building strong mega brands
- ❑ Exports – a strong growth engine
- ❑ Profitable adjacency – three wheelers
- ❑ Continuous investment in R&D and emerging technologies





XL100
HEAVY DUTY **i-TOUCH**start

i-TOUCHstart



i-Touch Start

Value for customer: Comfort

USB
CHARGING



USB Charger

Value for customer: Convenience of mobile charging even in power deficit regions

LED DRL



LED DRL

Value for customer : Style



TVS
Jupiter
ZYADA KA FAYDA



Telescopic Suspension

Value for customer – Riding comfort & less strain on body while riding



12" Alloy Wheels

Value for customer: Better road grip



External Fuel Filling

Value for customer: More convenience & comfort



Metal Body

Value for customer: Perception that vehicle won't break down if met with an accident



Largest Front Leg Space

Value for customer: More comfort & convenience to carry things



India's 1st BT Connected Scooter

Value for customer: Safety, Flaunt Value



125 3V CVTi REVV Engine

Value for customer: Fast pick up, Top Speeds on a scooter



Stealth aircraft inspired Styling

Value for customer: Head Turner, Grabs attention



TVS Radeon
जियो बुलंद
बढ़ो बुलंद



Chrome Bezel Headlamp & DRL

Value Add: Style and safety



Petrol tank with Ribbed thigh pads

Value Add: Style



Car like Speedometer

Value Add: Style



Long Cushion Seat

Value Add: Comfort



Full Chrome Metal Exhaust

Value Add: Style



staR city+



Ecothruster Engine

Value for customer: Power and pick-up



Econometer

Value for customer: Power and Mileage



SBT

Value for customer: Safety



AHO

Value for customer: Safety



Hi- Grip Tyres

Value for customer : Safety



Apache
RTR 160 4V
RACING DNA UNLEASHED



Race inspired 4 Valve O3C engine

Value for customer: High Power delivery and pick-up with 4 Valve technology



Patented Racing Syncro stiff Chassis

Value for customer: Precise handling, easy maneuverability & sharp corners



Race tuned Monoshock

Value for customer: Higher confidence while riding & better handling



Digital Racing Console

Value for customer: Records Top Speed, 0-60 time and provides gear shift indication

Super Moto
ABS

Single Channel ABS

Value for customer: Enhanced Safety



Unique Reverse Inclined DOHC Engine

Value for customer: Best-in-class Power to Weight ratio



Digital Speedometer Console

Value for customer: Hosts a lot of information for comprehensive ride analysis



Aerodynamics

Value for customer: Stability at high speeds, reduced engine heat in traffic, superior top end performance



Bi-LED Headlamps

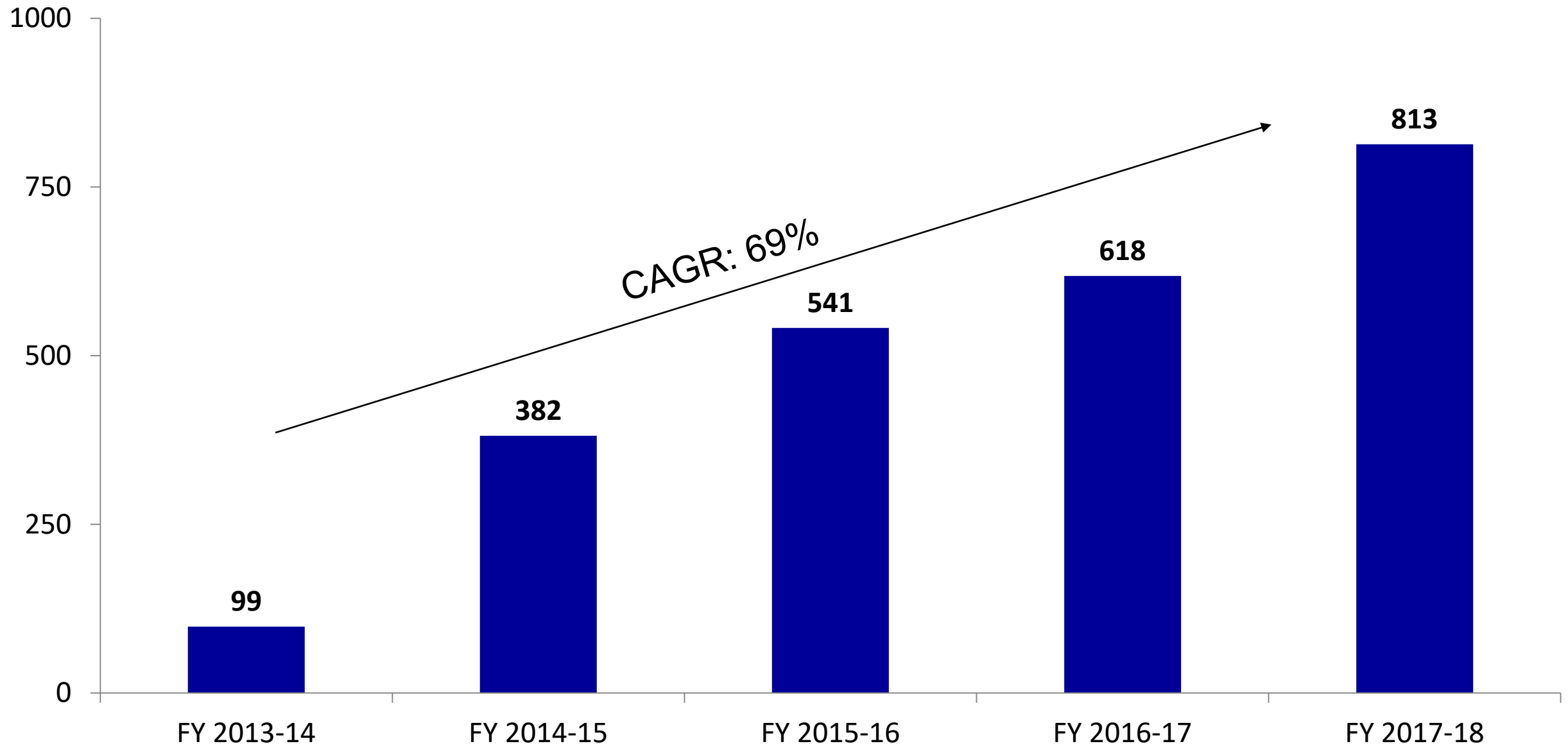
Value for customer: Offers high intensity headlamps at day and night enabling high speed riding with confidence

Double Channel ABS

Value for customer: Enhanced Safety



Nos. in '000

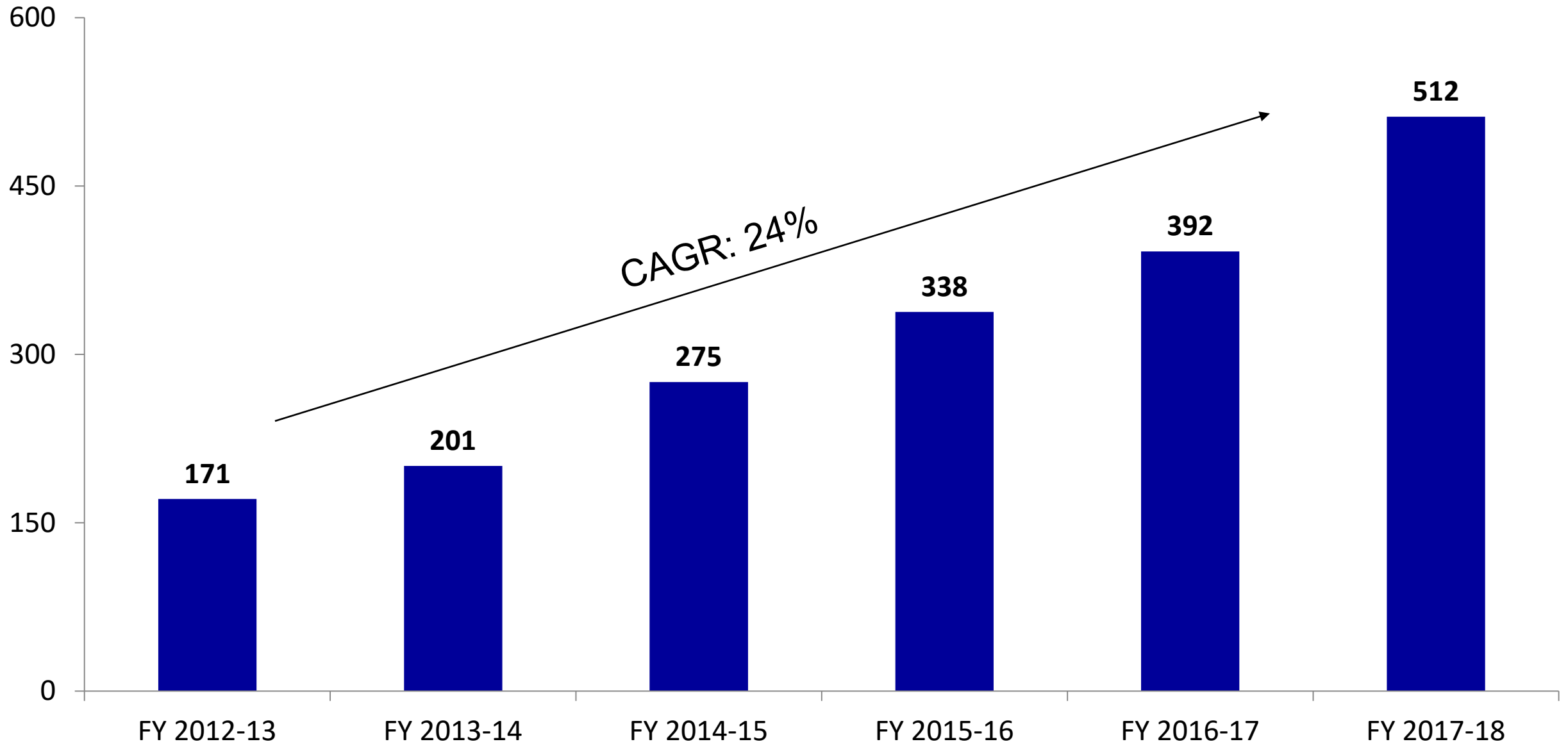




- >125cc segment share in scooters increased from 6.4% in 2014-15 to 14.5% in 2017-18. This is likely to exceed 20% in 2018-19.
- TVS NTORQ Launched during Q4 of 2017-18
- Sales of 2018-19 already crossed 2 lakh nos.

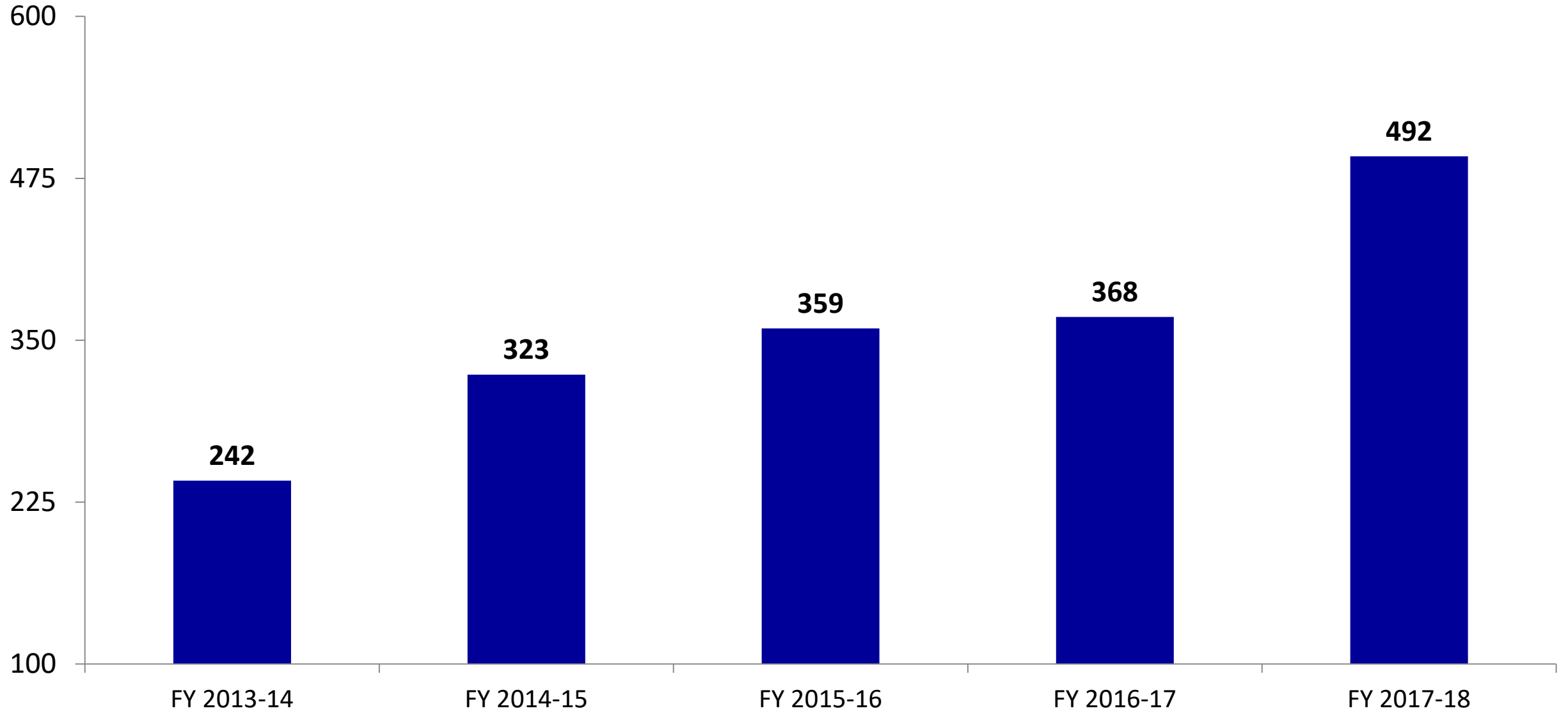


Nos. in '000



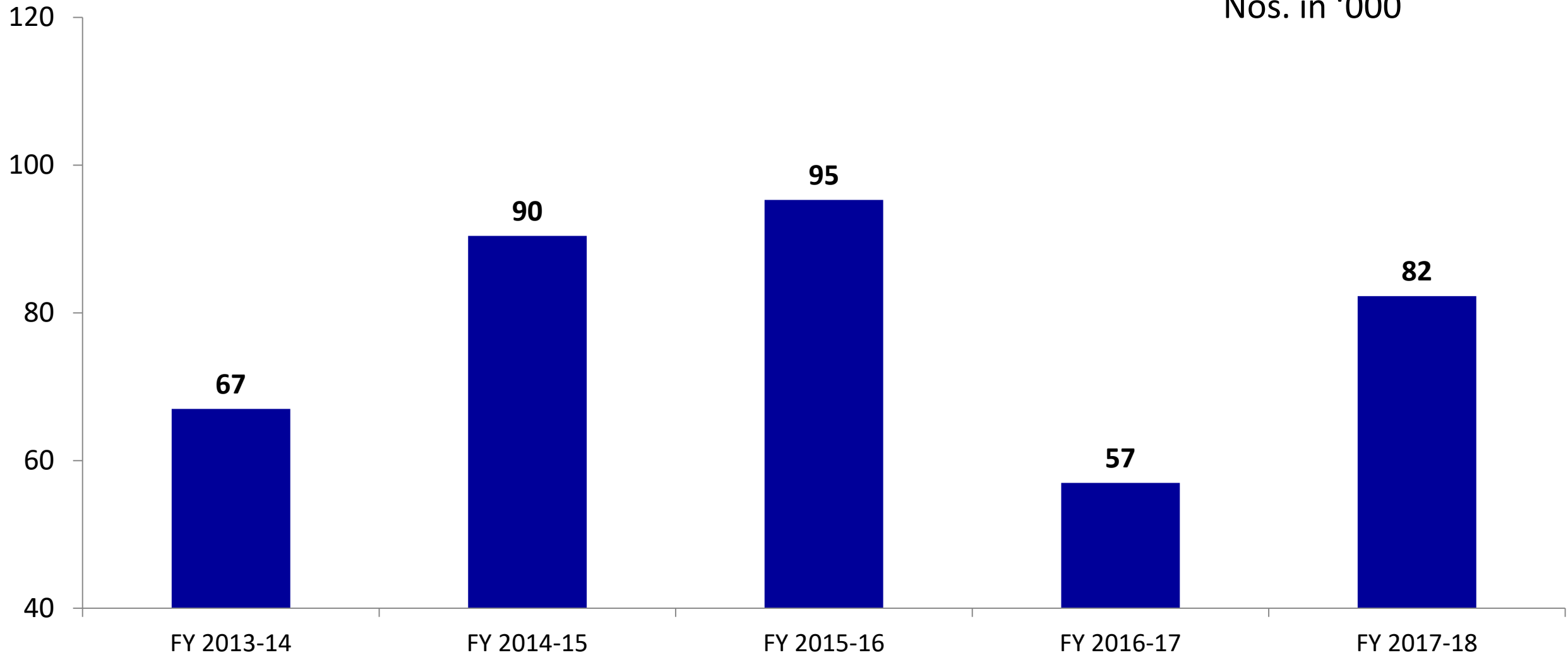


Nos. in '000





Nos. in '000



- 2016-17 and 2017-18 3W exports affected consequent to restricted availability of foreign exchange in key African markets

Strong R&D Infrastructure and Intellectual Property

- World class facility employing over 600 engineers
- Partnership with leading international research institutes
- World Class products setting the benchmark in their category

R&D Spends	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Rs Mn	1204	1272	1318	1958	2264	2447	2685
% of Sales	1.7	1.8	1.6	1.9	1.9	1.8	1.7



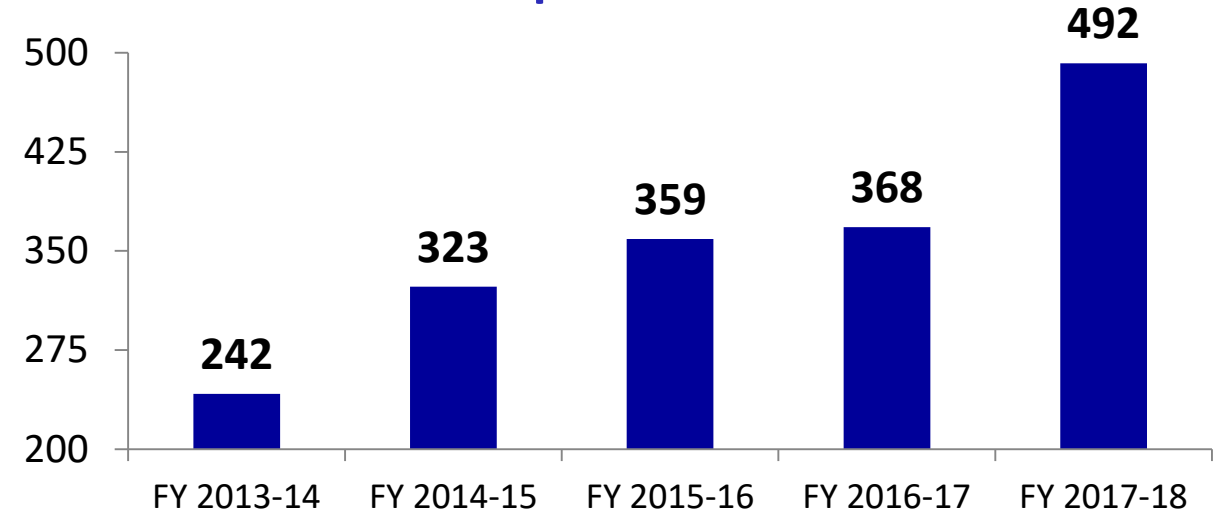
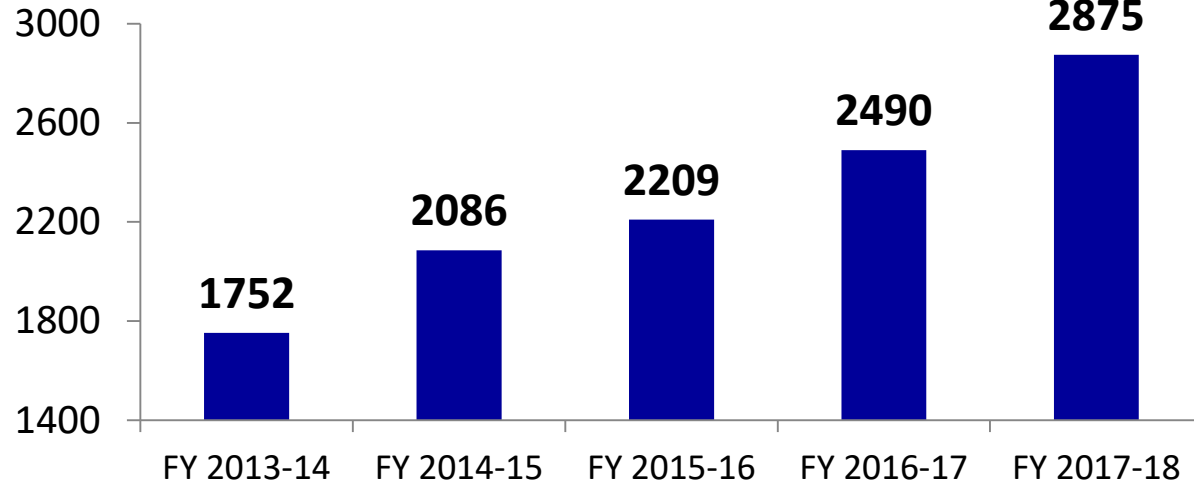
TVSM standalone performance



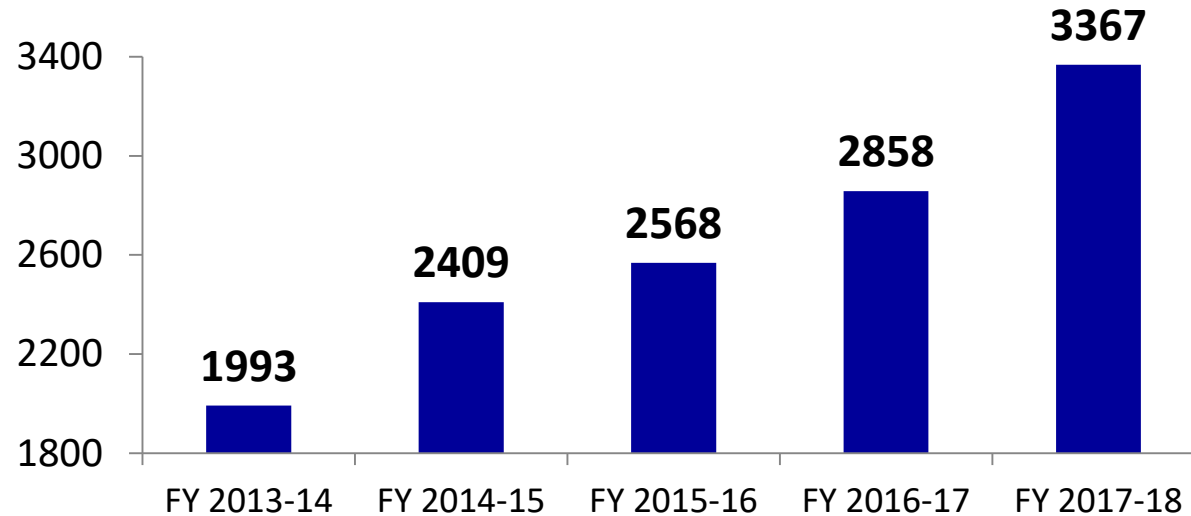
Domestic Sales

Nos. in '000

Export Sales



Total Sales

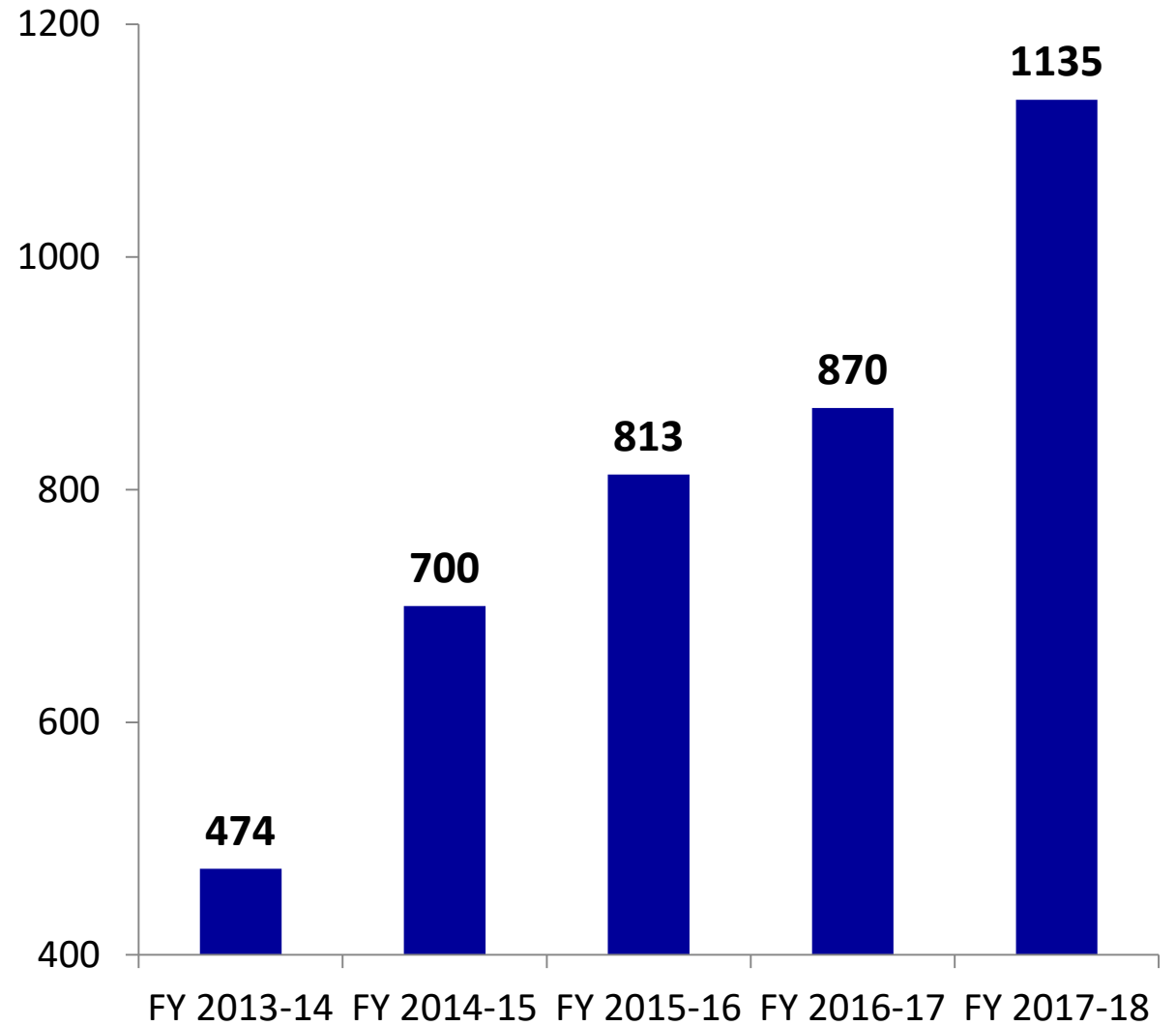
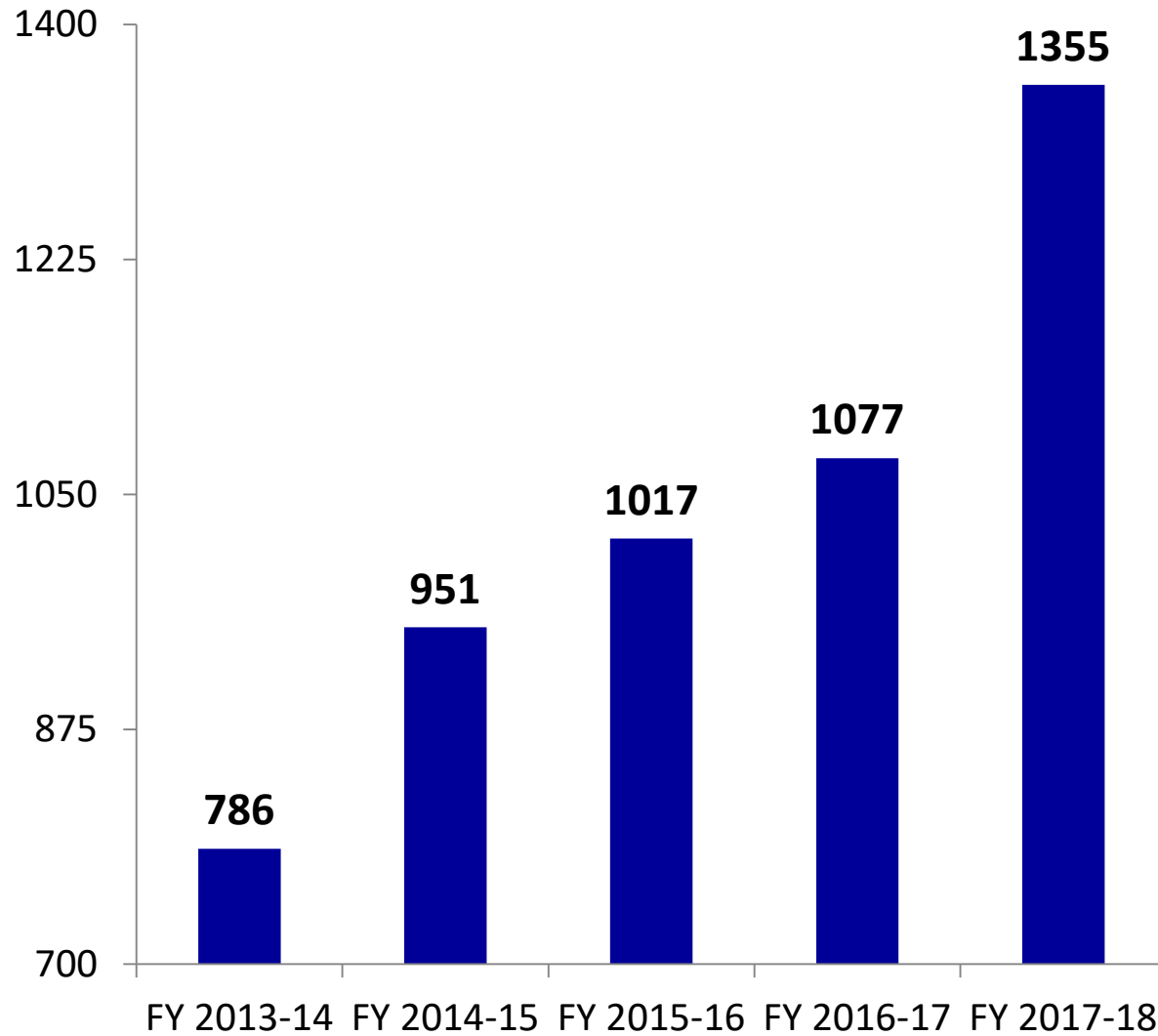




Motorcycles

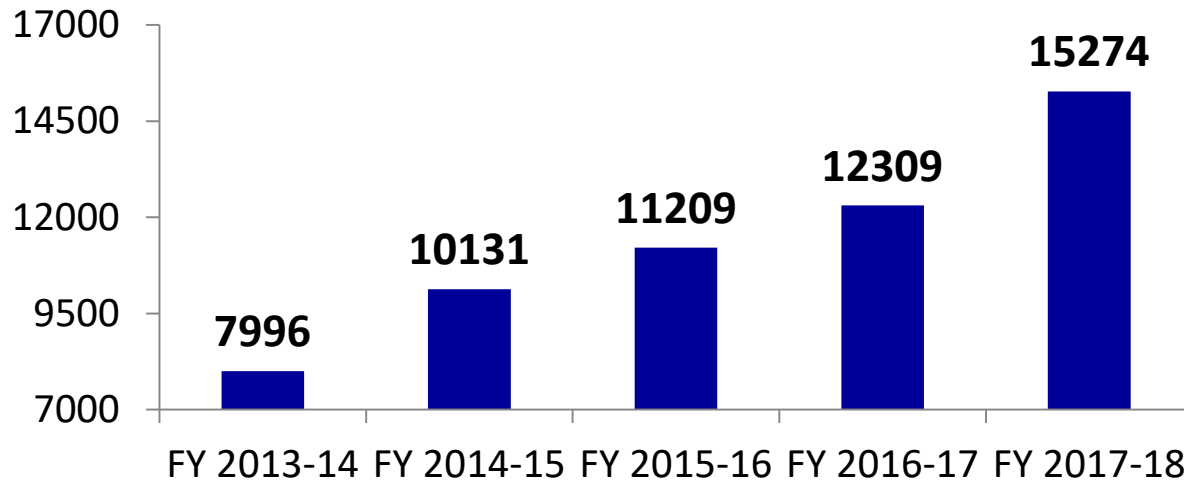
Nos. in '000

Scooters



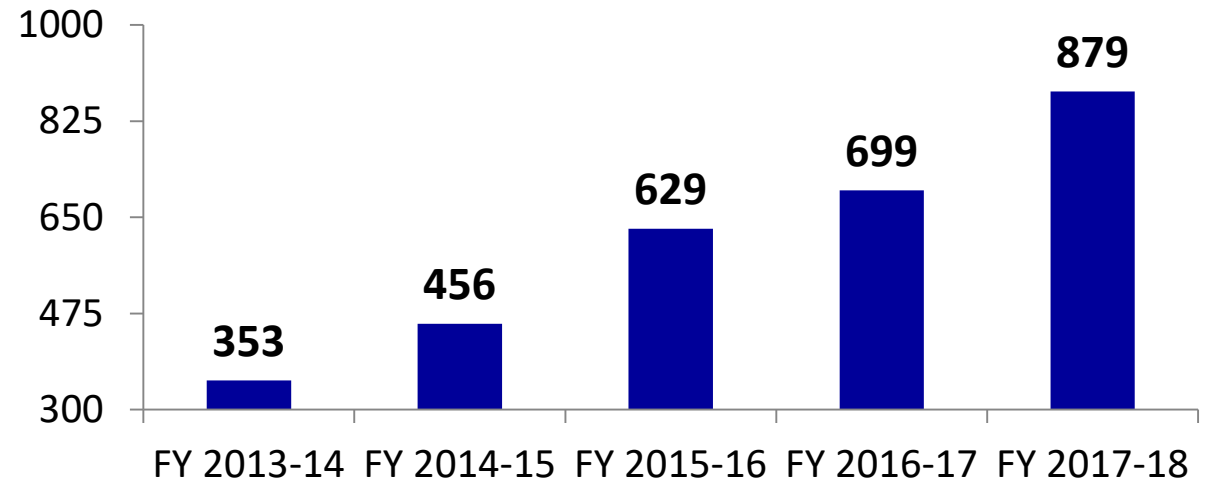


Total Revenue excluding excise duty

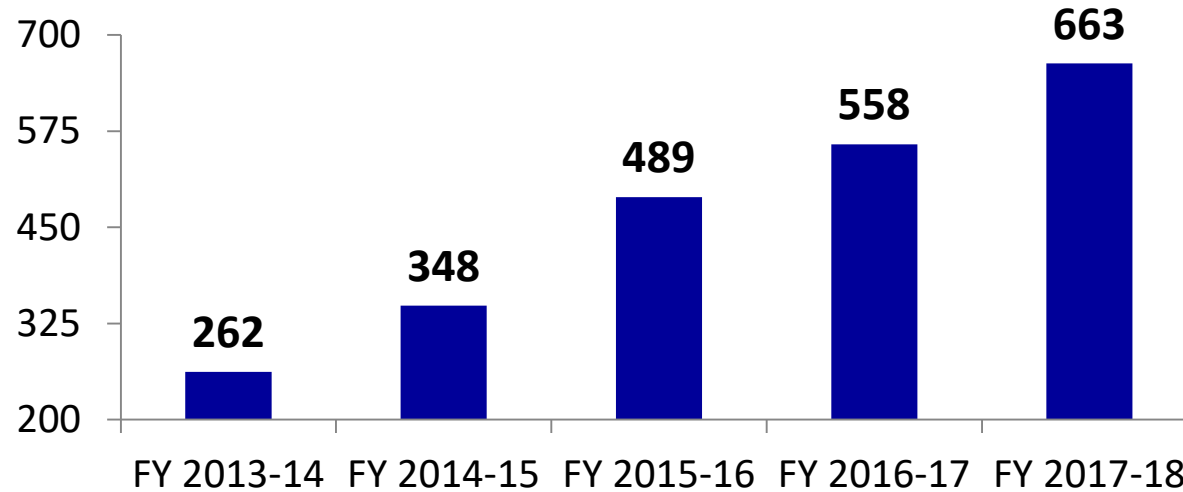


INR in Crores

PBT



PAT





- ❑ Book size as on 31st March 2018: Rs 6,152 Cr.
 - 2W 48%
 - Used cars 30%
 - Tractor 20%
 - Others 2%
- ❑ Total income during 2017-18 was Rs 1,340 Cr - increase of 20% over 2016-17
- ❑ PBT for 2017-18 was at Rs 170 Cr compared to Rs 136 Cr during 2016-17, growth of 25%
- ❑ PAT for 2017-18 was at Rs 114 Cr compared to Rs 88 Cr during 2016-17, growth of 30%
- ❑ No.1 financier for TVS Motor
- ❑ Presence in 3000+ dealerships with Tab-based app for instant processing of loans
- ❑ 1.2 million live customer base

Awards won by TVSM during 2018-19





- **TVS Motor Company won the “two wheeler manufacturer of the year” award at Car & Bike India awards 2019.**
- **TVS Motor Company bagged 2 prestigious awards at the CII-ITC Sustainability Awards 2018.**
The categories for which the company won the awards are namely the ‘Corporate Excellence Award’ and ‘Corporate Social Responsibility Award’.
- **TVS Motor Company won 2 prestigious awards at International Awards by Otherways Management & Consulting, France.** The categories for which the company won the awards are “Green Era Award for Sustainability” and “Quality and Business Excellence Award”.
- **TVS Motor Company won the “Best CSR initiative (Two-Wheeler)” at Autocar India Awards 2019.**

Contd..



- **TVS NTORQ 125, won many prestigious awards during 2018-19**
 - Best of 2018 Two-Wheeler Award – Auto X
 - Scooter of the Year by
 - Autocar India Awards 2019
 - Motor Vikatan 2019,
 - Car & Bike India awards 2019
 - Times Auto Awards 2019 powered by BBC TopGear
 - Engine of the Year under 150 cc – Indian Automotive Technology & Innovation Awards 2018

Contd..



- TVS Radeon declared “Bike of the Year up to 125cc” by Exhibit Auto Tech Awards 2019 and “Commuter Bike of the Year” by Motor Vikatan 2019.
- TVS Apache RR 310 won the “Bike of the Year up to 400cc” at Car & Bike India Awards 2019

Contd..



- TVS Motor Company was ranked number 1 in J.D. Power 2018 India Two-Wheeler Customer Service Index (2WCSI) for the 3rd year in succession.
- TVS Motor Company bagged top honors in J.D. Power 2018 India Two-Wheeler Initial Quality Study (2WIQS).

J.D. Power 2018 India Two-Wheeler Automotive Product Execution and Layout (2W APEAL) Study

- TVS Jupiter - Ranked No 1 in the scooter segment.
- TVS Apache RTR 180 – Ranked No 1 in the premium motorcycle segment.
- TVS StaR City + - Ranked No 1 in the economy motorcycle segment.



- TVS Motor has gained market share over the past few years consequent to strong portfolio and brands
- Exports and 3W add to geographical spread and product portfolio
- The quality and customer centric focus helped the company to secure top honours in JD power survey.
- Consistent profitable growth over past 5 years
- TVSM will continue to lead the way and ride on wave of success

AN AWARD FROM OUR CUSTOMERS, MAKES IT ALL THE MORE SPECIAL.
TVS  **IS NO.1 AGAIN**



TVS Motor Company has been awarded No.1 in customer satisfaction for the third year in a row.
J.D. Power* awards are given based on one of the largest consumer survey's in the automotive industry.





Thank you

No part of this presentation is to be circulated, quoted, or reproduced for any distribution without prior written approval from TVS Motor Company Limited, PB 4, Harita, Hosur-635109, Tamilnadu, India. Certain parts of this presentation describing estimates and future plans may be “forward looking statements” within the meaning of applicable laws and regulations. Actual results might differ materially from those either expressed or implied. This material is not a complete record of the discussion.