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TVS Supply Chain Solutions

Q1 FY25 Earnings Presentation

July 2024



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Q1FY25

Financial Performance



We had a strong first quarter, driven by topline growth in both our ISCS and NS segments. The ISCS segment continues to lead our performance supported by significant volume improvements in the NS segment. Our customers recognize our supply chain transformation capabilities, tech-led solutions and the ability to deploy AI-driven solutions resulting in our participation in more large deals. For Q1 FY25, our pre-exceptional profit before tax stood at ₹ 13.7 crore as compared to a loss of ₹ 33.8 crore in Q1FY24.

In the first quarter we added new customers contributing to 10.7% of consolidated revenue, while leveraging our existing capabilities to serve current clients. During the quarter, we commenced strategic contracts with a global auto major in Singapore and with a leading auto major in India signifying the customer confidence in our ability to handle and value add critical processes.

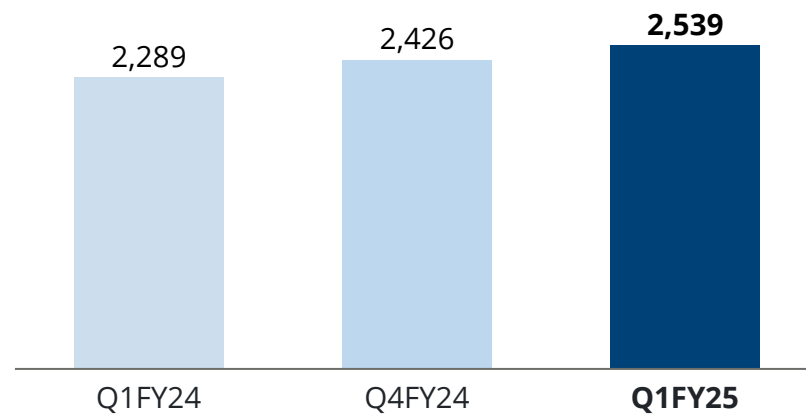
On the Tech front, we implemented Artificial Intelligence (AI) based Polarized Light Damage Detection deployed for Beverage Clients in Europe. Our commitment to delivering these cutting-edge technology led solutions has helped us return to profitability. With a strong pipeline and increasing inquiries, we remain optimistic about achieving our medium-term outlook.

Financial Snapshot

Revenue

YoY Growth
10.9%

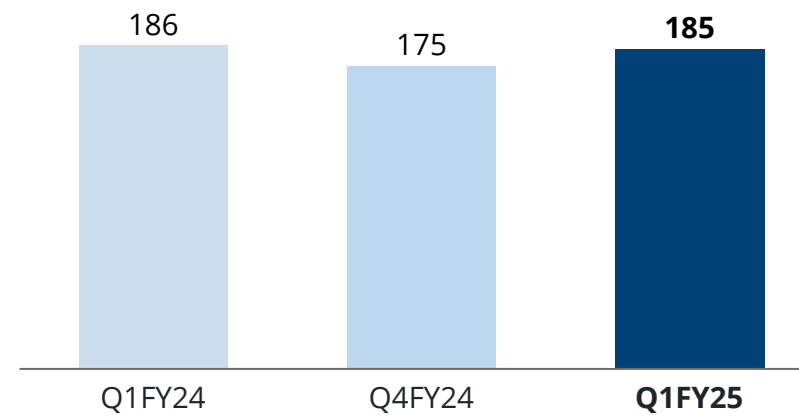
QoQ Growth
4.7%



Adj EBITDA

YoY Growth
-1.0%

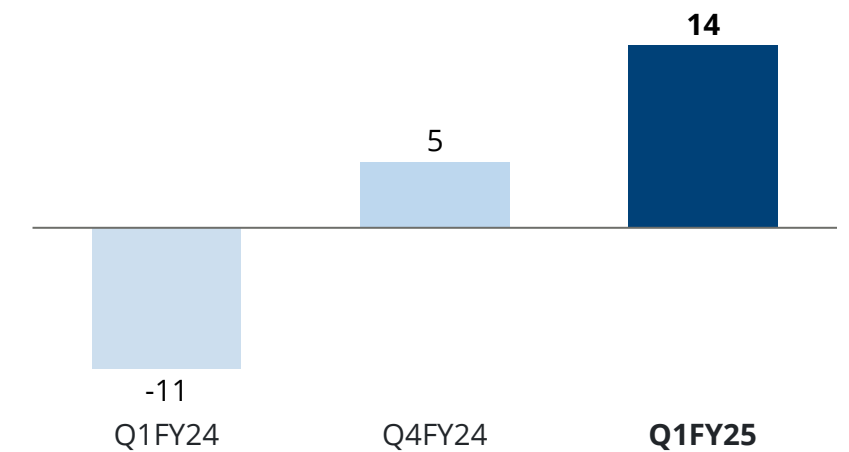
QoQ Growth
5.7%



PBT (before exceptional items)

YoY Growth
Turns +ve

QoQ Growth
177.1%



New Business Wins
₹ 246.1Cr

Robust BD Pipeline
₹ 4,000 Crs

Gross external debt
₹ 778 Crs

Strong revenue performance across both segments driving improvement in PBT

Executive Summary

Business update:

- Awarded Partner Level status by US based global Farm Equipment Manufacturer, this a key milestone in the relationship
- On track in set up of an automated facility for a UK based Multinational Energy Co; completion in Q2
- Commenced key parts distribution engagement with Auto Major in South-East Asia
- Commenced business in newly established GFS offices in US, Italy
- Significant milestone of 500K CKD parts achieved for an Auto Major in India

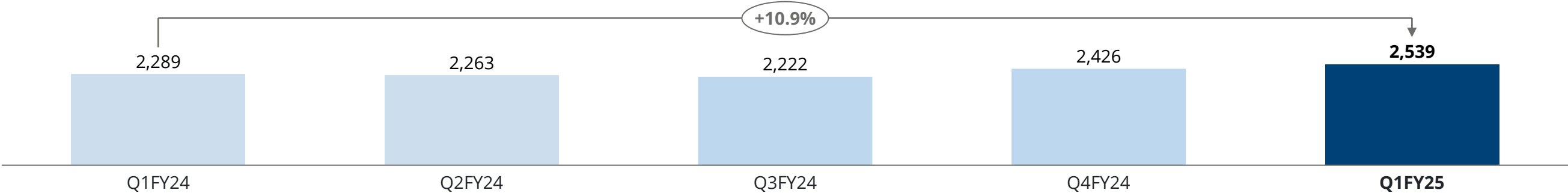
Tech update:

- We continue to focus on Artificial Intelligence enhancements to our solutions and have AI deployed at scale in our key geographies
- Alpha Platform uses Artificial Intelligence to validate Proof of Delivery (India transportation platform)
- Implemented vision inspection in sub-assembly process allowing real-time quality checks at US Farm Equipment Manufacturing Co.
- Partnership with UK based leading University focusing on AI governance and how to implement it as a core structure throughout the business

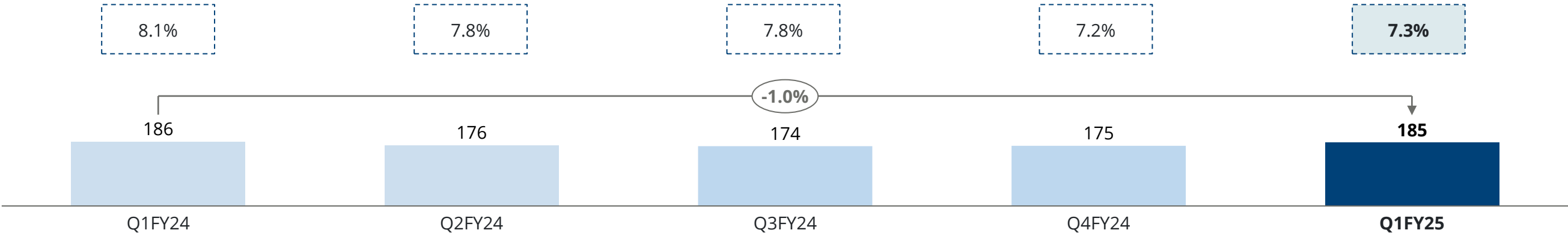


Growth Trajectory: Strong revenue performance across both segments drives improvement in PBT

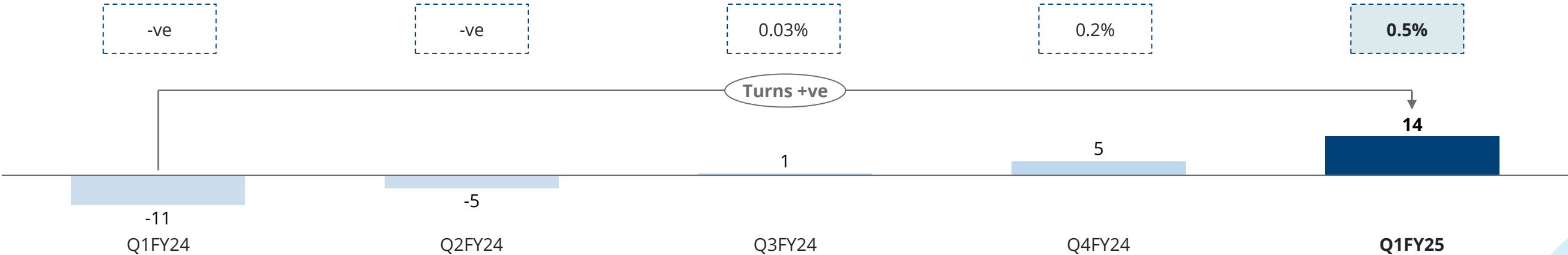
Revenue



Adj. EBITDA & Margin



PBT & PBT Margin



Margins



Key Highlights

	Integrated Supply Chain Solutions (ISCS)	Network Solutions (NS)
Quarterly Performance	<p>ISCS continues to deliver strong growth</p> <ul style="list-style-type: none">✓ Q1 revenue: ₹ 1,425.9 Cr; grew 8.1% YoY and 3.4% QoQ✓ Q1 Adj. EBITDA: ₹ 138.2 Cr; de-growth of 1.1% YoY and growth of 3.9% QoQ✓ Adj. EBITDA Margins stood at 9.7%	<p>NS segment grew both revenue and Adj. EBITDA YoY & QoQ</p> <ul style="list-style-type: none">✓ Q1 revenue: ₹ 1,113.5 Cr; grew by 14.8% YoY & 6.4% QoQ✓ Q1 Adj. EBITDA: ₹ 49.8 Cr; grew by 10.6% YoY and 5.9% QoQ✓ Adj. EBITDA Margins stood at 4.5%
FY 25 Outlook	<ul style="list-style-type: none">✓ ISCS momentum expected to continue in FY 25 supported by a healthy pipeline and continued focus on margin	<ul style="list-style-type: none">✓ GFS freight rates have normalized and focus on FY 25 is improving profitability✓ IFM turn around is WIP and we expect target run rate profitability by H2 FY25

We have witnessed strong growth in both our business segments with increasing performance on a YoY and QoQ basis.
Going forward we are optimistic of the growth trajectory and margin outlook

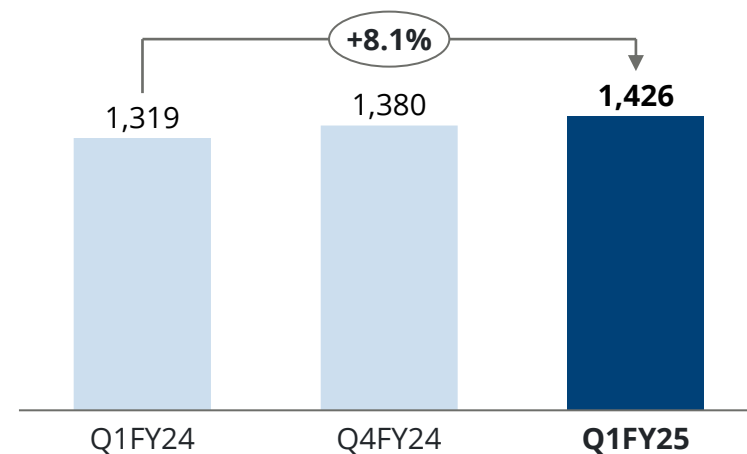
Segment wise Revenue and Adj EBITDA: 10.9% YoY growth in revenue driven by consistent revenue performance in ISCS and improved volume in GFS

ISCS Segment (In ₹ Cr.)

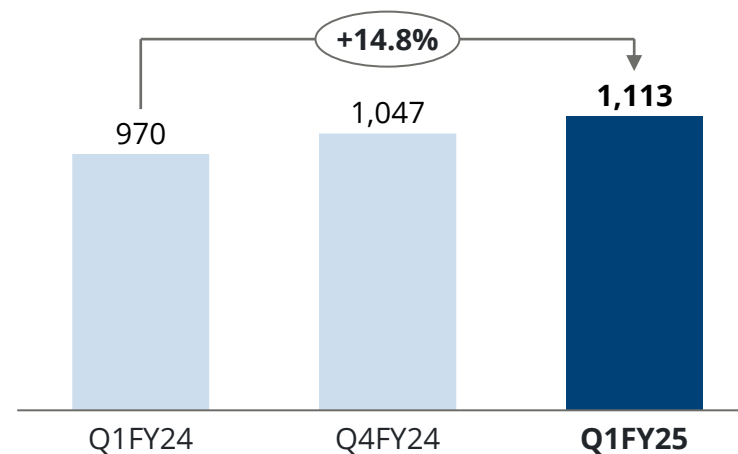
NS Segment (In ₹ Cr.)

Total (In ₹ Cr.)

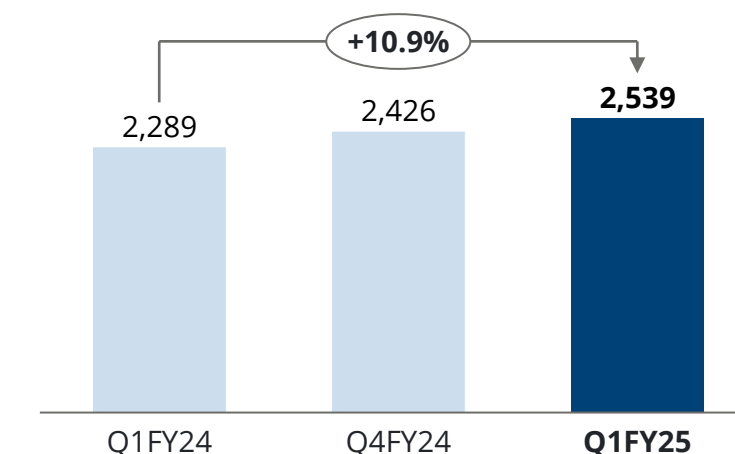
Revenue



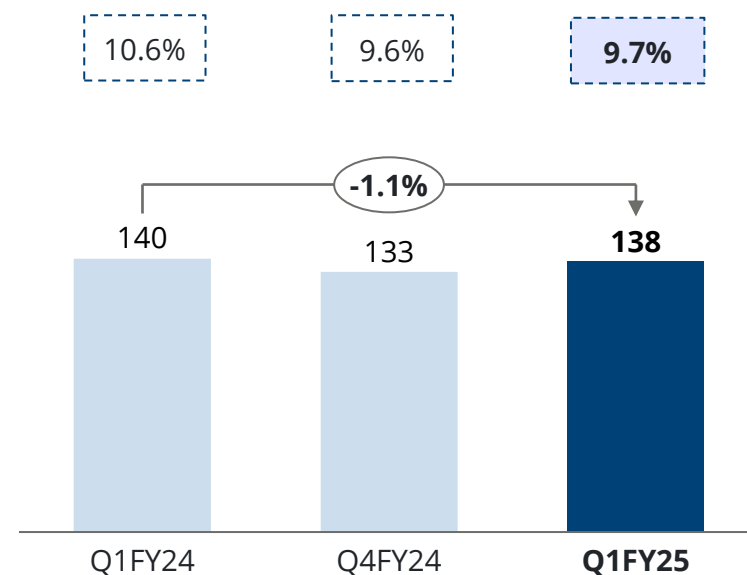
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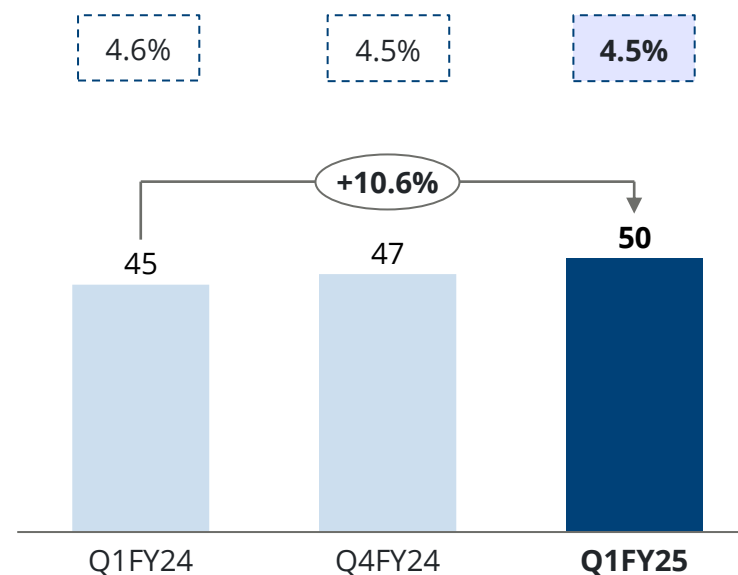
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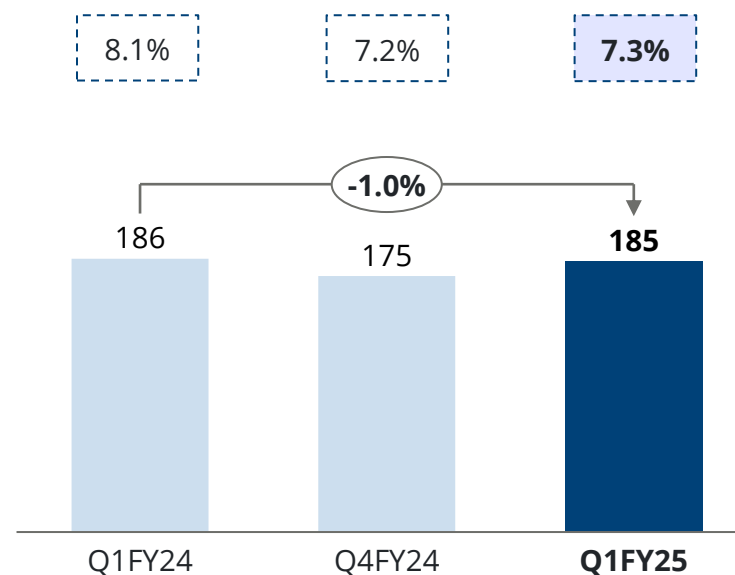
Adj. EBITDA & Margin



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Margins

Drop in YoY margins due to change in business mix

Geography wise Revenue : RoW shows exceptional growth momentum in both segments.

in ₹ Cr

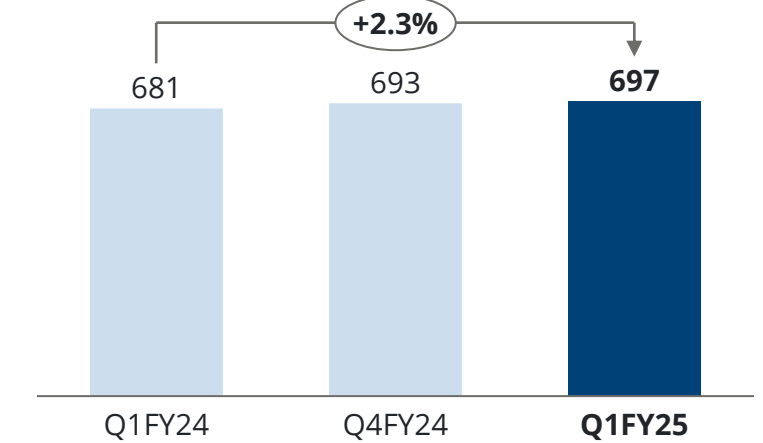
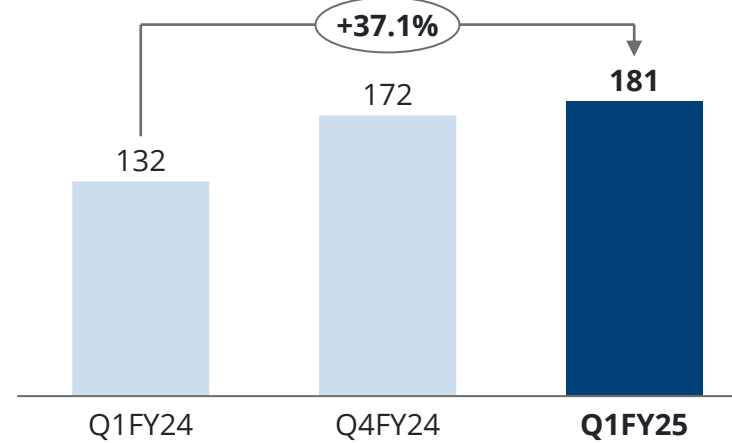
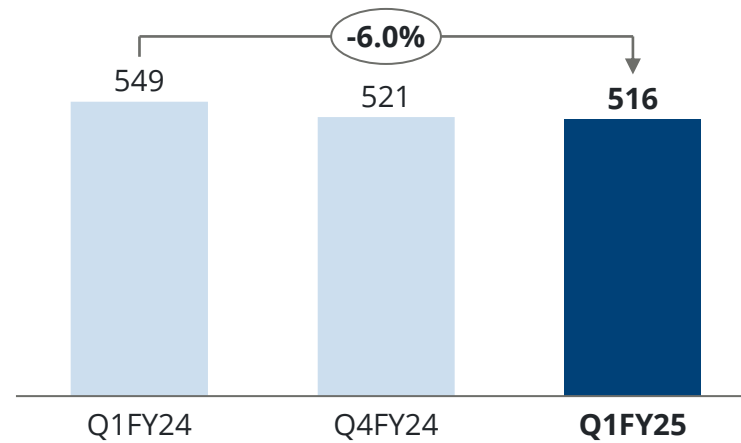


ISCS Segment (In ₹ Cr.)

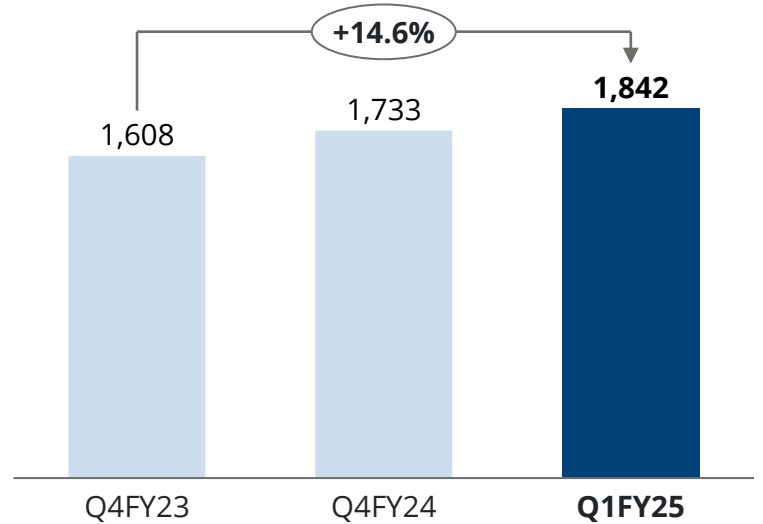
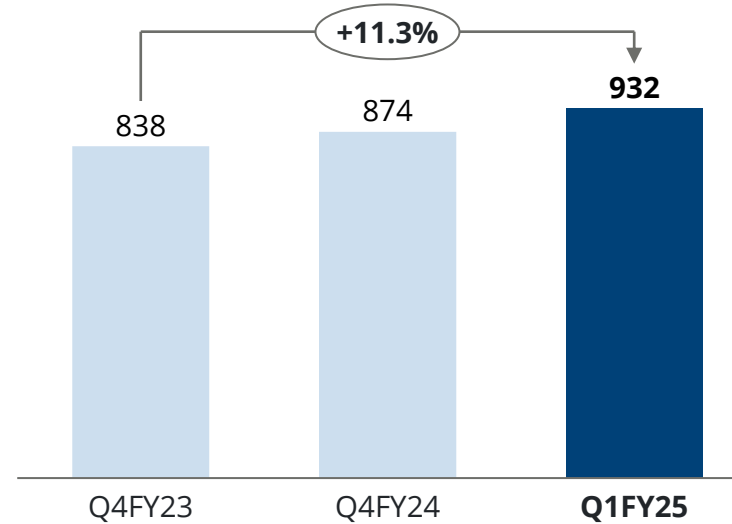
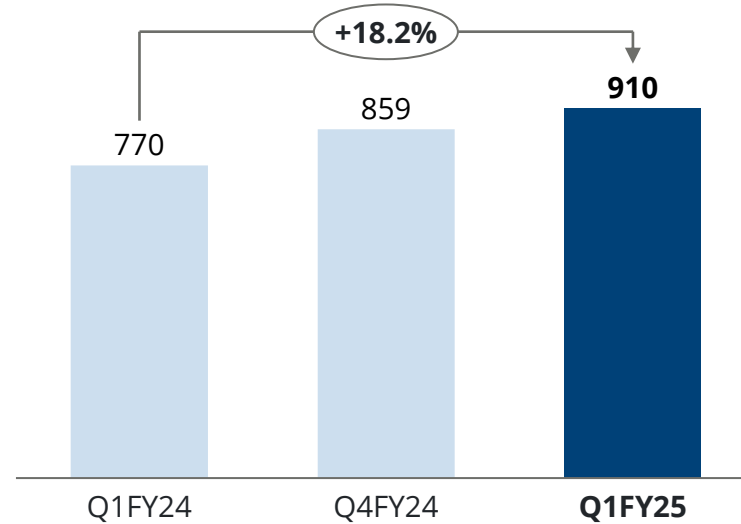
NS Segment (In ₹ Cr.)

Total (In ₹ Cr.)

India



RoW



Strong new business delivery

Revenue bridge: Q1 FY24 to Q1 FY25 in ₹ Cr



In Q1FY25, **10.7%** of our consolidated revenue are generated through new business development and expanding wallet share with existing customers

Robust Pipeline continues to propel the revenue growth

Small opportunities (sub ₹ 20 Cr ARR)

Spares management solution for plumbing, heating & renewable energy co

Mid-sized opportunities (₹ 20 – 50 Cr ARR)

Intra-Asia air and sea cargo solution for a global elevator manufacturer

Supply chain & procurement solution for wind turbine manufacturer

Repair and refurbishment solution for a global tech equipment provider

Integrated solution including service support for food & beverage co

Large opportunities (> ₹ 50 Cr ARR)

Air cargo solution for a global HVAC / building management Company

Integrated solution for an electrical appliances manufacturer in India

Value added assembly & automation for a global agri-equipment company

Integrated solution for a consumer durable manufacturer in India

Business development efforts yielding consistent results

ISCS Segment

Global IT services
provider
(India)

Metal forgings
manufacturer
(India)

Passenger / Commercial
vehicle manufacturer
(India)

Industrial machinery
manufacturer
(Europe)

Passenger car
manufacture
(US)

NS Segment

Global electronic
component
manufacturer
(Asia Pacific)

Two-wheeler
manufacturer
(India)

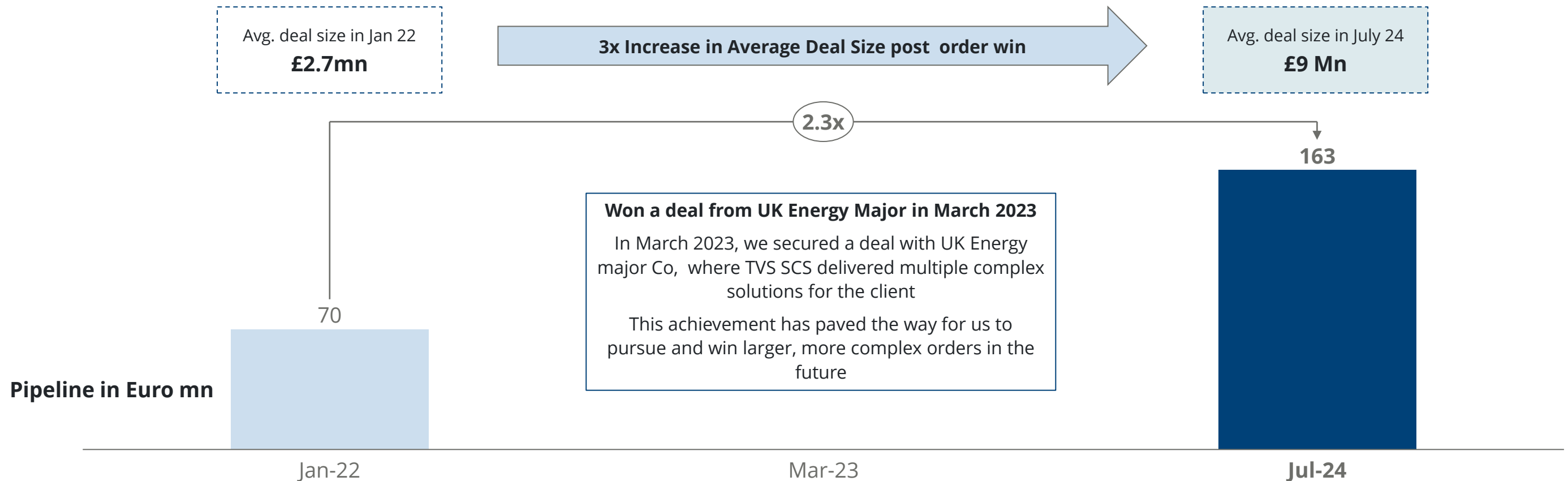
Furniture manufacturer
(Asia Pacific)

Material handling
equipment
manufacturer
(UK)

System integrator / IT
services co
(Europe)

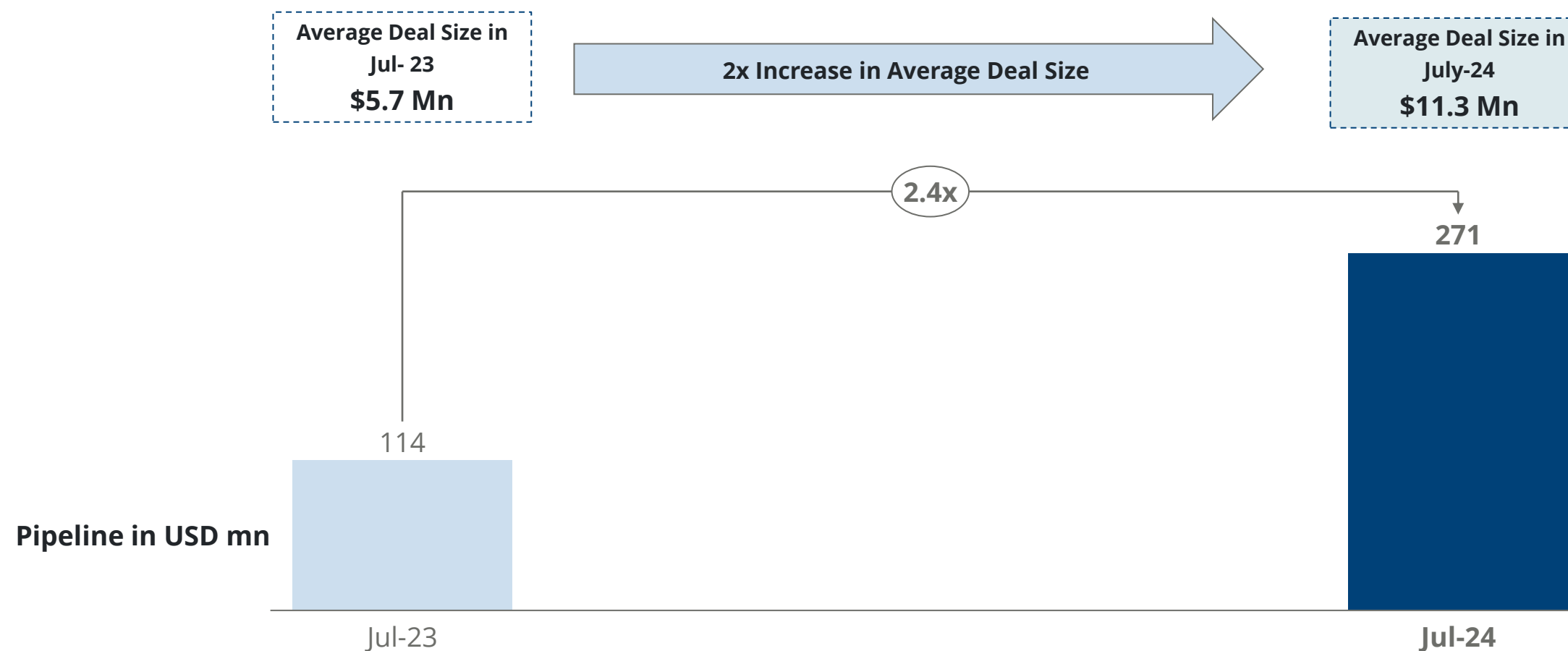
UK Energy Co. opened the doors for participation in larger deals

In SCS Europe, our pipeline in the ISCS business has considerably grown in the last 12 - 15 months



We are seeing increase in large deals in our growing US pipeline

Order Pipeline has grown 2.4x and average deal size has grown ~2x since Jul 2023



Our engagement with leading farm equipment manufacturer in US has been a milestone for the North America business

Q1FY25 Profit & Loss Statement

In ₹ Cr - Continuing operations	Q1FY25	Q1FY24	Y-o-Y	Q4FY24	Q-o-Q
Revenue from operations	2,539.4	2,288.9	10.9%	2,426.3	4.7%
Other Income	5.6	18.2		6.8	
Total Income	2,545.0	2,307.1	10.3%	2,433.1	4.6%
Total material related costs	488.7	416.6		467.4	
Freight, clearing, forwarding and handling charges	733.3	567.4		637.9	
Sub-contracting costs and Casual labour charges	343.4	376.3		364.1	
Total Variable Expenses	1,565.4	1,360.3		1,469.4	
Variable Margin	974.0	928.6	9.0%	956.9	1.8%
Variable Margin (%)	38.4%	40.6%		39.4%	
Employee Cost	576.8	549.8		568.3	
Other Expenses	215.3	208.4		215.6	
Total Fixed Expense	792.1	758.2		783.8	
EBITDA	181.8	170.4	6.7%	173.1	5.1%
EBITDA Margins (%)	7.2%	7.4%		7.1%	
ESOPS	0.0	-3.3		0.0	
Add : Loss on Forex Translations	-2.7	-12.6		-1.4	
Adjusted EBITDA	184.5	186.3	-1.0%	174.5	5.7%
Adjusted EBITDA Margins (%)	7.3%	8.1%		7.2%	
Depreciation	135.2	136.8		138.5	
EBIT	46.7	33.6		34.6	
Finance Cost	39.5	63.3		38.2	
Share of Profit from TVSILP	1.0	0.8		1.9	
Profit before Exceptional Items & Tax	13.7	-10.7		5.0	
Exceptional Items	0.0	-23.2		0.0	
Profit before Tax	13.7	-33.8	NA	5.0	177.1%
Profit before Tax Margin (%)	0.5%	-1.5%		0.2%	
Tax	6.3	17.3		-0.4	
Profit After Tax	7.5	-51.2	NA	5.4	38.3%
PAT Margins (%)	0.3%	-2.2%		0.2%	
PAT (before Exceptional items)	7.5	-28.0		5.4	

Company Overview

A supply chain solution provider with end-to-end capabilities...

We have two operating segments:

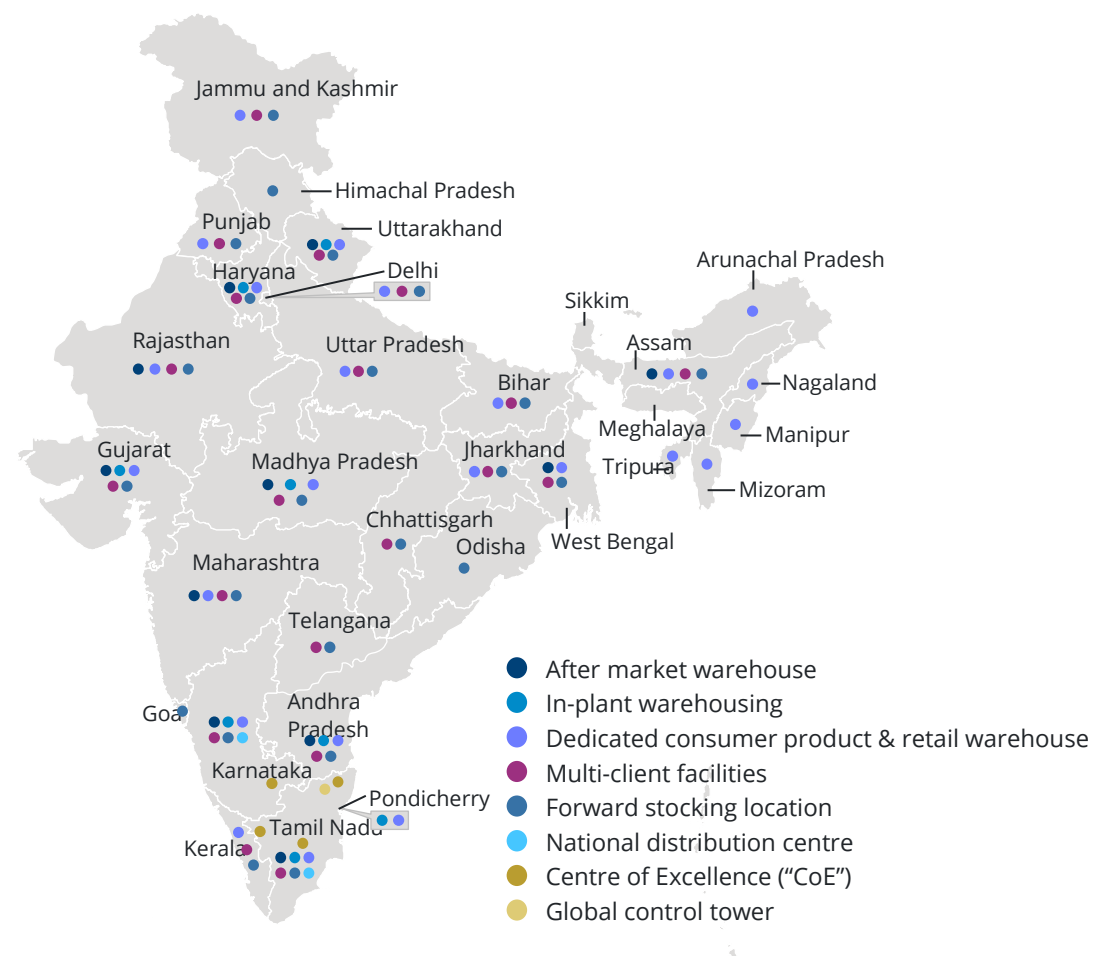


★ Integrated Supply Chain Solutions

★ Network Solutions

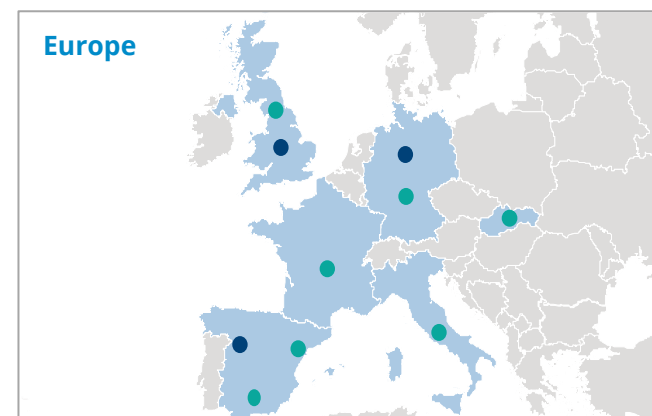
...with a global business headquartered in India...

We are present across India

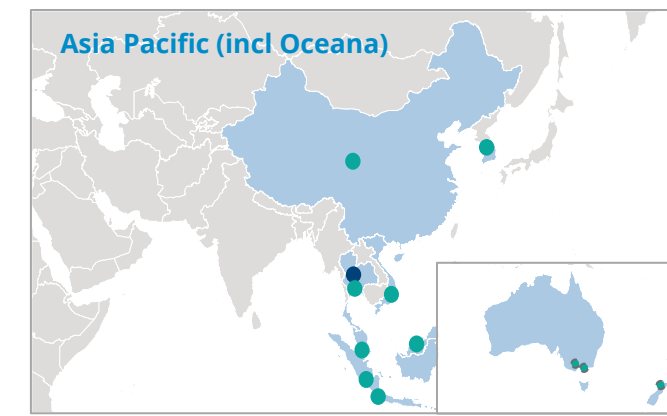


Total warehouse space: 20.8 Mn sft
No. of permanent employees: 13,110

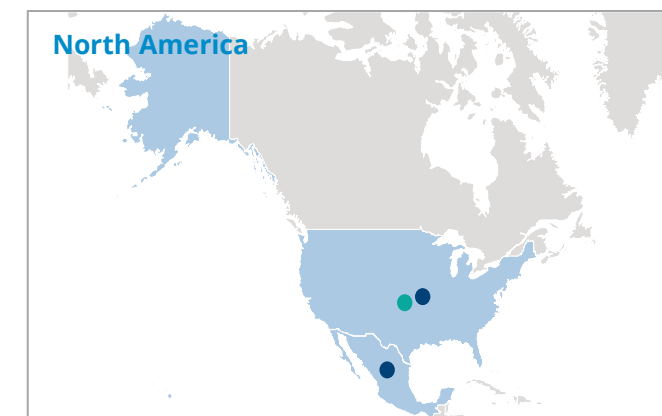
And globally across four continents



Total warehouse space: 1.9 Mn sft
No. of permanent employees: 2,710



Total warehouse space: 1.3 Mn sft
No. of permanent employees: 753



Total warehouse space: 1.5 Mn sft
No. of permanent employees: 482

...and Experienced Management Team



R. Dinesh
Executive Chairman

Executive Chairman, Past-President CII, Director TVS Mobility



Ravi Viswanathan
Managing Director

Prior experience: Tata Group



Ravi Prakash Bhagavathula
Global CFO

Prior experience: Pfizer, Coca-Cola, Procter & Gamble

Regional CEOs

Integrated Supply Chain Solutions Segment



Kameswaran Sukumar
CEO, TVS SCS India

Prior exp:
FedEx, AFL, Tata
Teleservices



Andrew Jones
CEO, TVS SCS Europe

Prior exp:
Klarius Group



Richard Vieites
CEO, TVS SCS North America Inc.

Prior exp:
Syncreon, CEVA



Vittorio Favati
CEO, TVS SCS Singapore

Prior exp: CEVA,
Syncreon, Eagle
Global Logistics



Jonathan Croyden
CEO, Integrated Final Mile

Prior exp:
Siemens,
Fujitsu



Baminee Viswanat
Global General Counsel

Prior exp:
Lenovo, Vijay
TV, Thomson
India



Ethirajan Balaji
Global CHRO

Prior exp:
Randstad India



Dinesh Narayan
Global CIO

Prior exp:
Infosys, United
Airlines

Global Functional leads

Strategies for Growth : 3C Approach

We identify opportunities using the 'C3 Framework' in the three C's - Customer, Capability and Country

1

CUSTOMER

- ✓ Deepen our customer relationships
- ✓ Acquire New Customers

We started with offering single service to a customer and subsequently we have been able to expand this relationship and started to offer bundle of services to them across regions

2

CAPABILITIES

- ✓ Continued innovation and investment in technology
- ✓ Continued focus on delivering value-added solutions and building end-to-end Capabilities
- ✓ Continue to invest in team, talent, and partners

We have added multiple capabilities over the years in order to continue to enhance our customers supply chain and achieve higher efficiency in our operations throughout the whole supply chain

3

COUNTRY

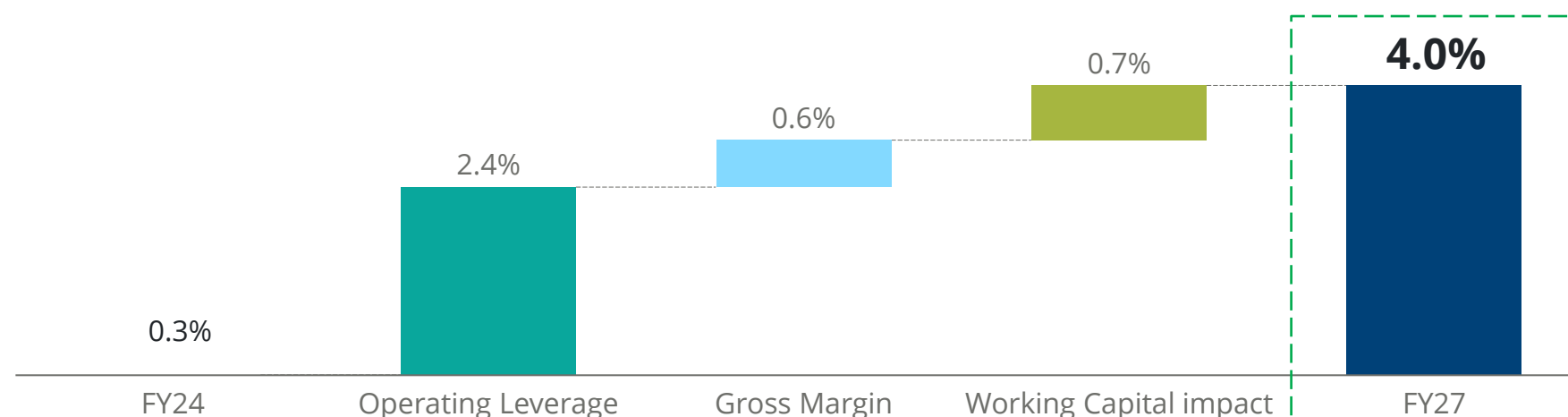
- ✓ Leverage our global network to expand into new markets
- ✓ Deepen presence in a country
- ✓ Continue to grow our global platform through targeted inorganic opportunities

Over the years we have expanded our geographical presence enabling us to accelerate growth, realize higher revenue and cost synergies and increase margins

Our strategy revolves around **ENCIRCLEMENT** which focuses on increasing the wallet share of existing customers by generating incremental business by increasing the scope of our services

Our Medium-Term Outlook

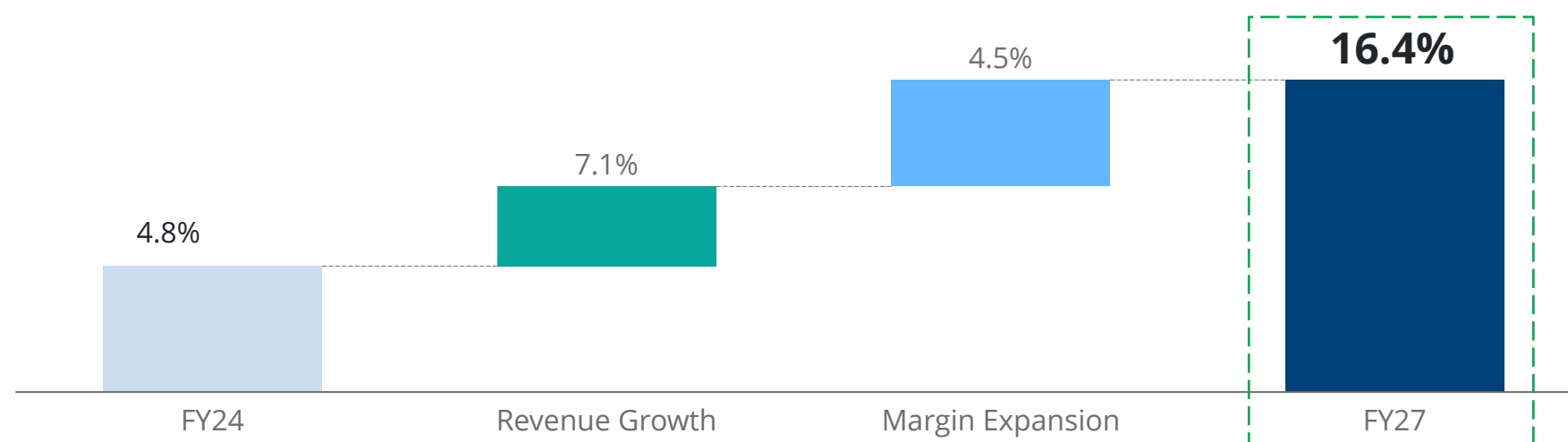
Profit Before Tax Margin (%)



Industry Best-in-Class*

PBT Margin:
8 - 11%

ROCE Profile (%)



RoCE Profile:
> 20%

Our Growth Vision



Deep Domain Expertise

Global Network

Proprietary Technology

Region wise segmental historical Overview

Outperforming the GDP growth Regionally

De-coupled to GDP
growth



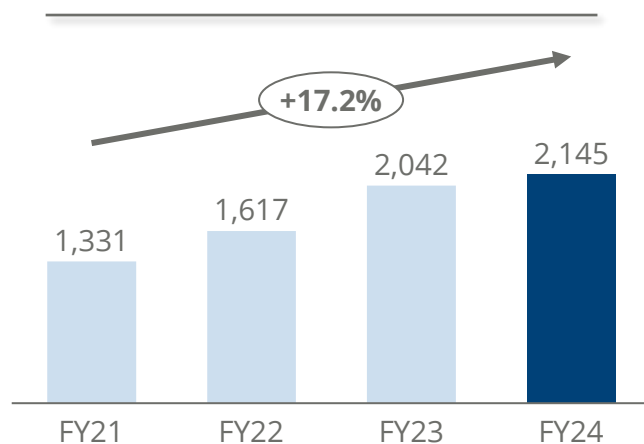
Our ISCS business has outperformed the GDP growth in the market we operate and has **grown at a CAGR of 17.8%** between FY21 & FY24

Continued Revenue
Momentum

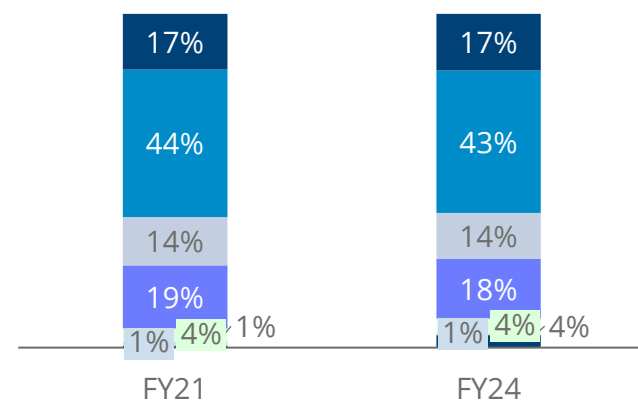


ISCS Consolidated

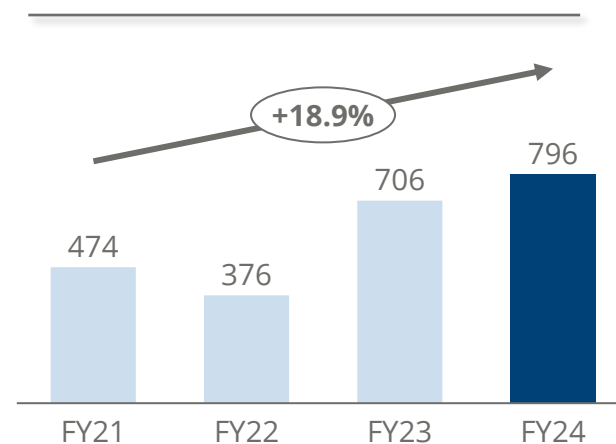
ISCS India Revenue



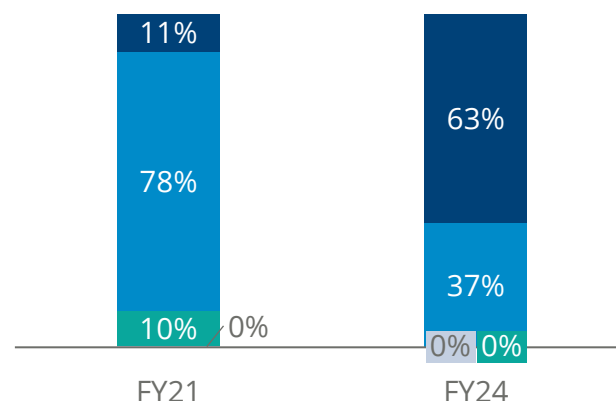
Industry Wise Breakup



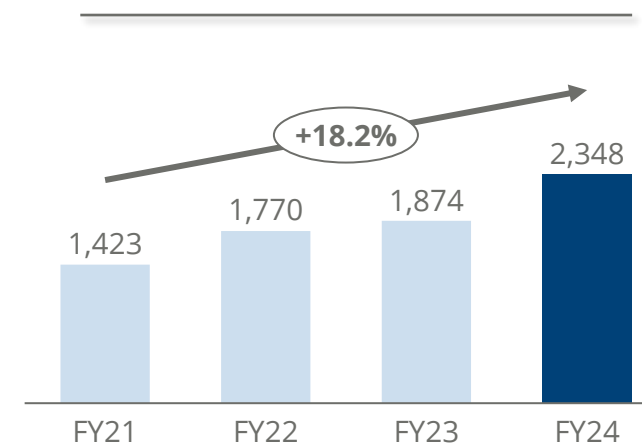
ISCS NA Revenue



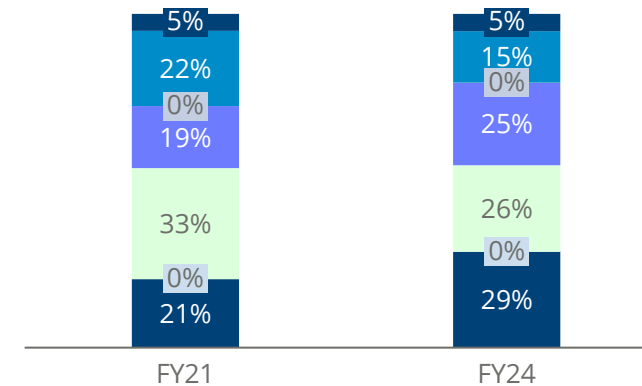
Industry Wise Breakup



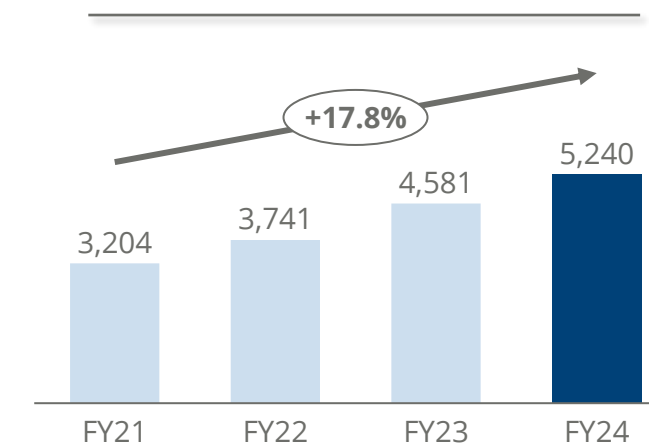
ISCS UK Revenue



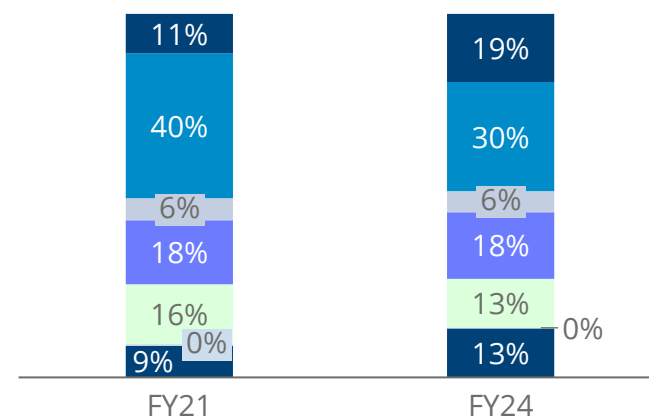
Industry Wise Breakup



Consolidated ISCS Revenue



Consolidated Industry Wise Breakup



Industrial Automotive Tech and Tech Infra Consumer Rail and Utilities Healthcare Others

Industrial Automotive Consumer Others

Industrial Automotive Tech and Tech Infra Consumer Rail and Utilities Healthcare Others

Industrial Automotive Tech and Tech Infra Consumer Rail and Utilities Healthcare Others

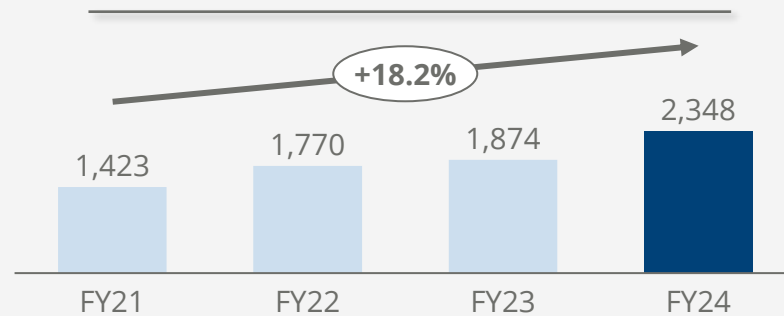
Encirclement

Diversification

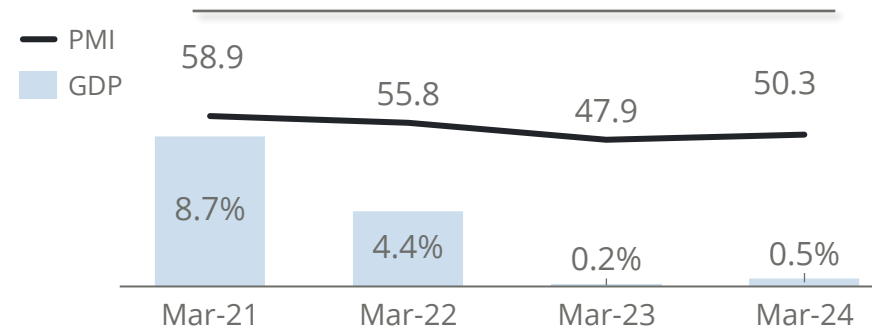
EBIT Margin Improvement

ISCS – UK Business

ISCS UK Revenue



UK GDP & Manufacturing Growth

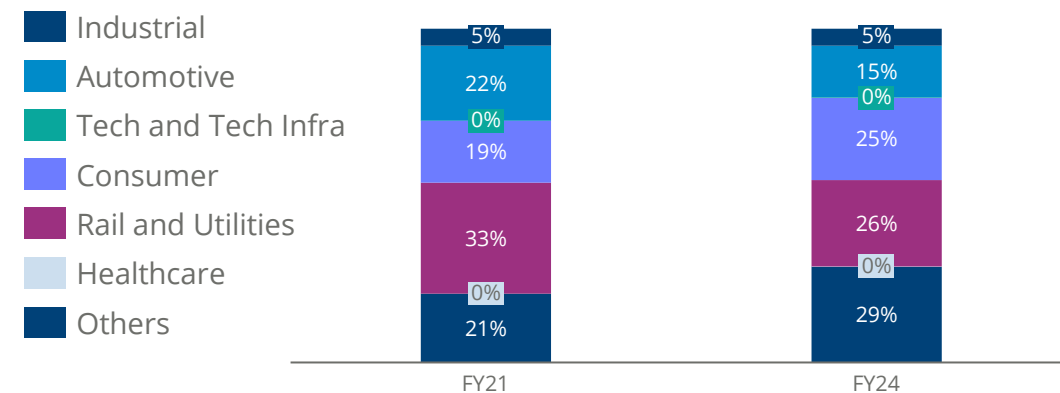


ISCS UK business grew by

18.2% CAGR

over the last 4 years, outperforming the UK GDP growth

De-Risking with Diversification



Key KPI

Average length of contracts*

6.2 Years in FY24

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~17% CAGR** in FY24 over FY21

Outlook

We have been able to offer differentiated solutions to our customers, thereby enhancing our wallet share & securing new contracts. Momentum to continue in FY 25.

Growth Levers

Encirclement

New contracts from Existing Customer & adding incremental wallet share

Diversification

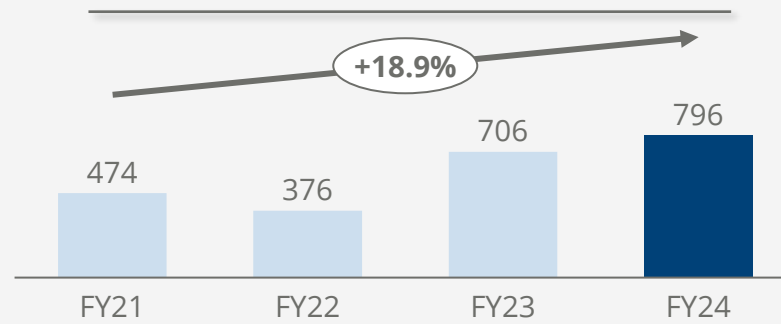
Addition of new customers across industries and adding multiple contracts across service lines

EBIT Margin Improvement

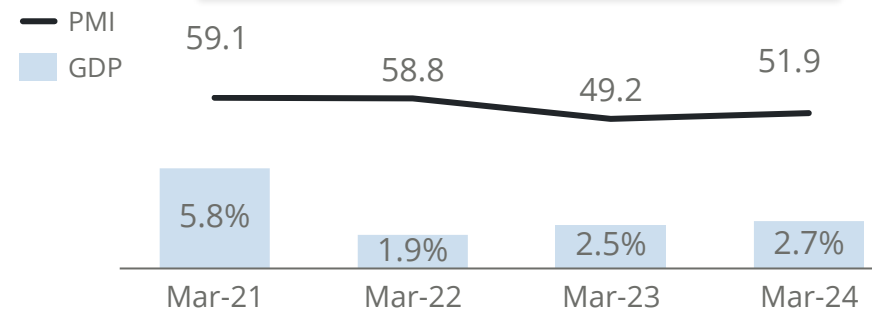
Contract level margin management coupled Operating leverage in line with medium term goals

ISCS – North America Business

ISCS North America Revenue

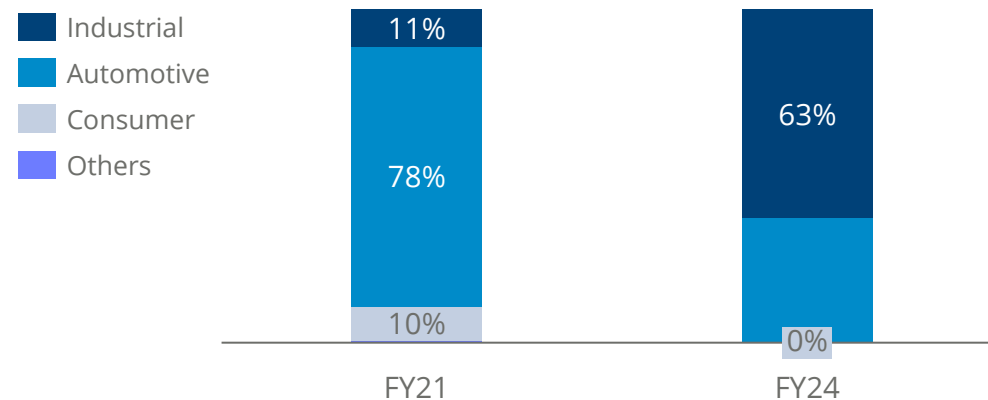


US GDP & Manufacturing Growth



ISCS North America business grew by
18.9% CAGR
 over the last 4 years, outperforming
 the US GDP growth

De-Risking with Diversification



Key KPI

Average length of contracts*
4.4 Years in FY24

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~13% CAGR** in FY24 over FY21

Outlook

We have seen a steady recovery and growth in our NA business over past three years. Momentum will continue in FY 25.

Growth Levers

Encirclement

New contracts from Existing Customer & adding incremental wallet share

Diversification

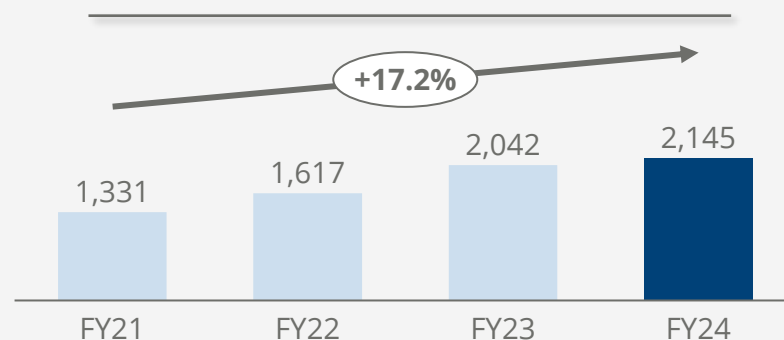
Addition of new customers across industries and adding multiple contracts across service lines

EBIT Margin Improvement

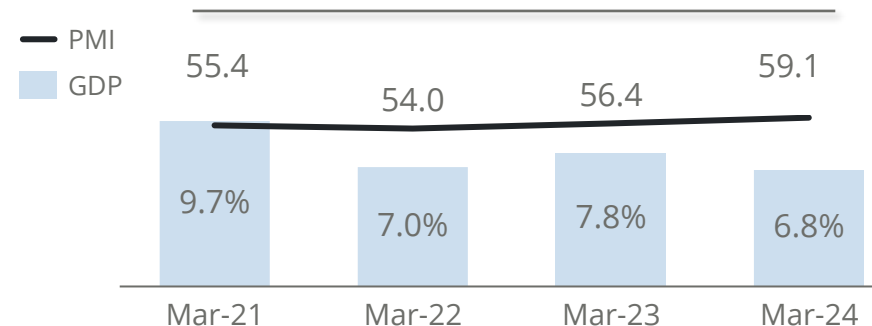
Contract level margin management coupled Operating leverage in line with medium term goals

ISCS – India Business

ISCS India Revenue



India GDP & Manufacturing Growth

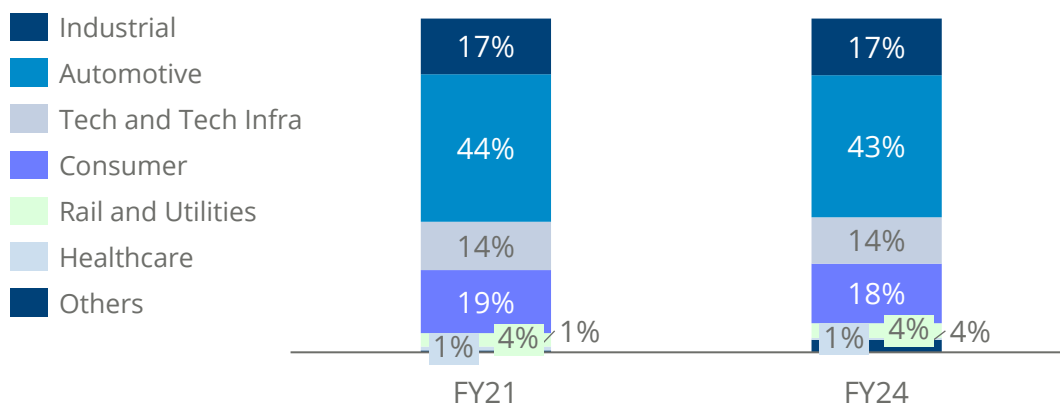


ISCS India business grew by

17.3% CAGR

over the last 4 years, outperforming the India GDP growth

De-Risking with Diversification



Key KPI

Average length of contracts*

5.9 Years in FY24

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~14% CAGR** in FY24 over FY21

Outlook

Growth being driven by TVS SCS **diversified portfolio, differentiated solutions supported by** strong economic indicators in both manufacturing and private consumption

Growth Levers

Encirclement

New contracts from Existing Customer & adding incremental wallet share

Diversification

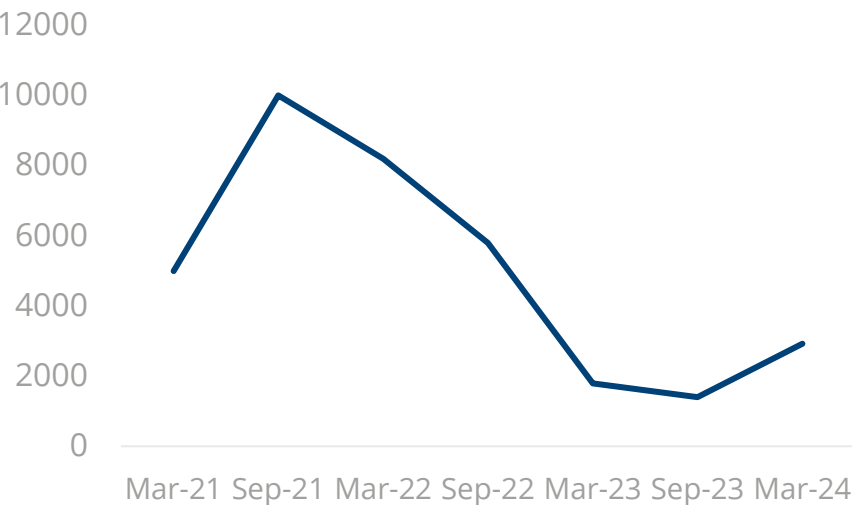
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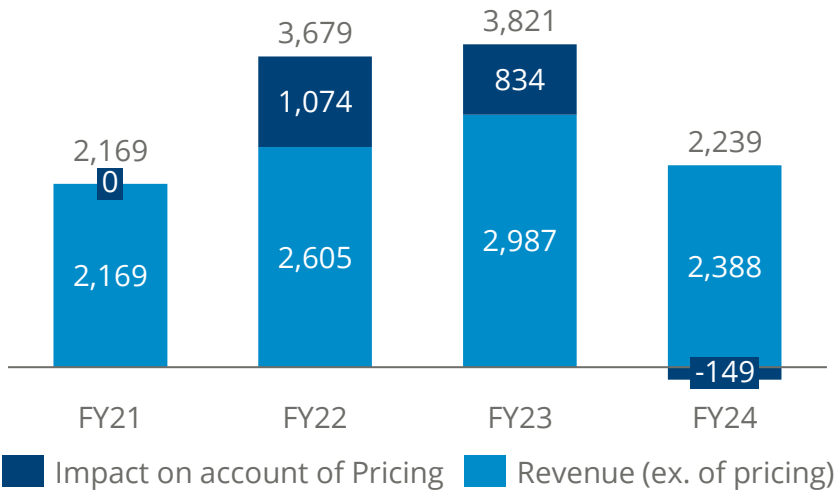
Contract level margin management coupled Operating leverage in line with medium term goals

GFS Performance

World Container Index (\$ per 40ft. Container)



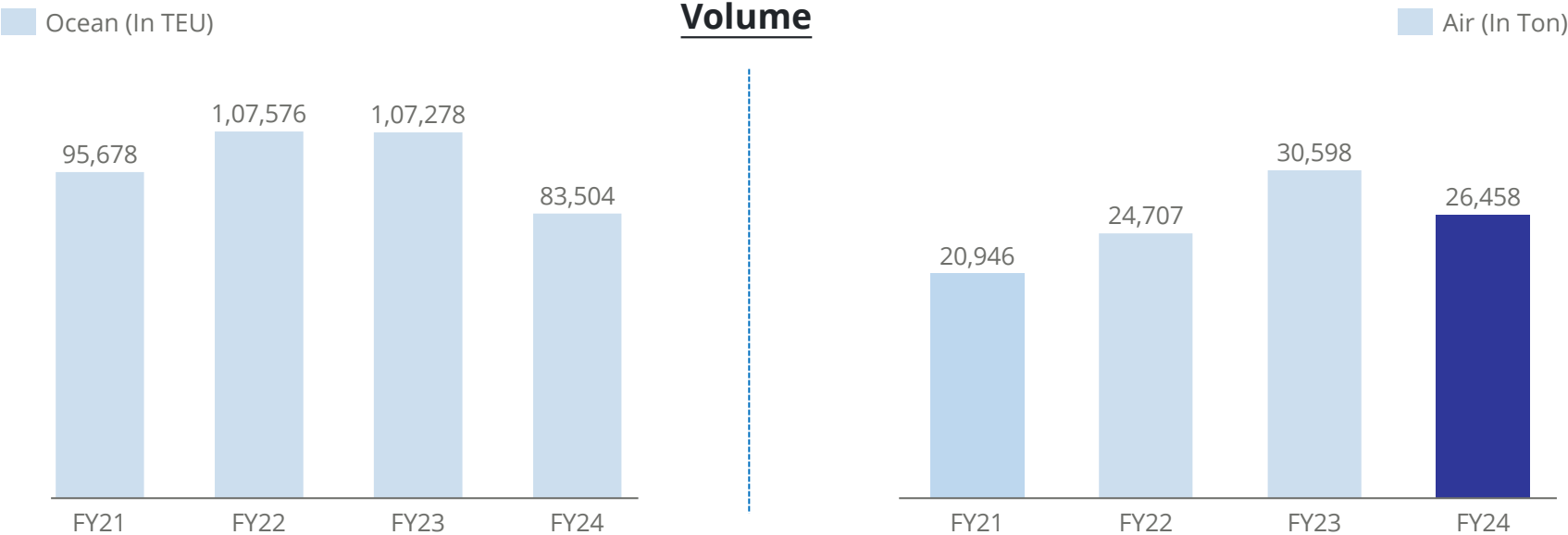
Revenue from Operations with
Impact due to Pricing



Impact for FY24

FY24 revenues & volumes had been impacted on account of various global macro economic uncertainties

Volume

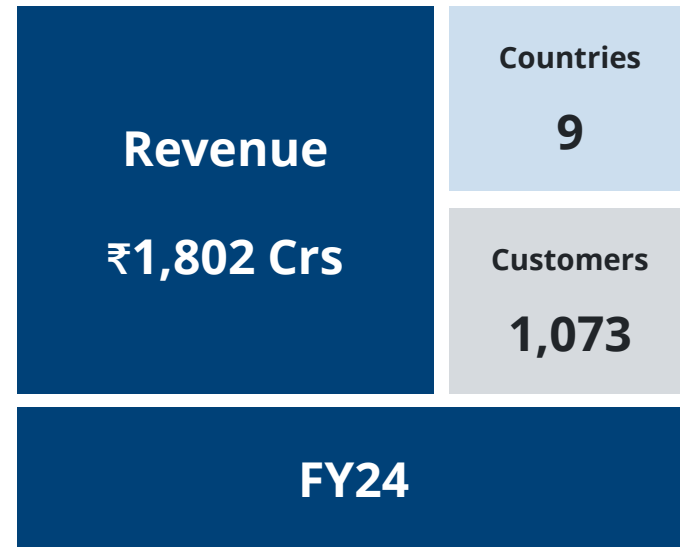


Outlook

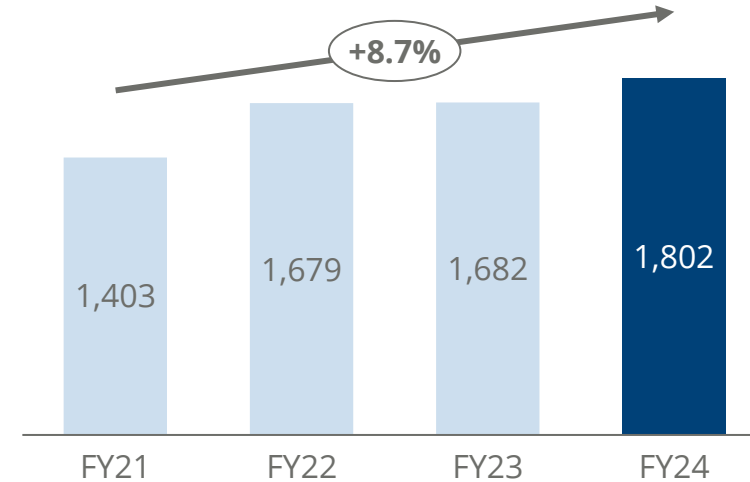
Key Initiatives to drive future growth

- Building on existing customer / trade lanes Increased **presence across new geographies** like US,
- Digital transformation to focus on enhancing the customer experience and optimizing operating costs

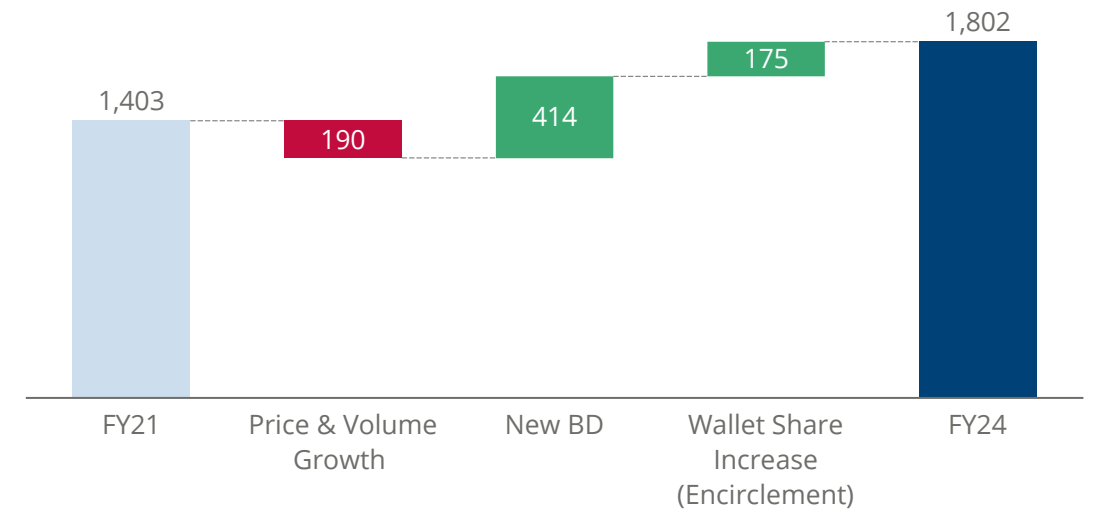
IFM Performance



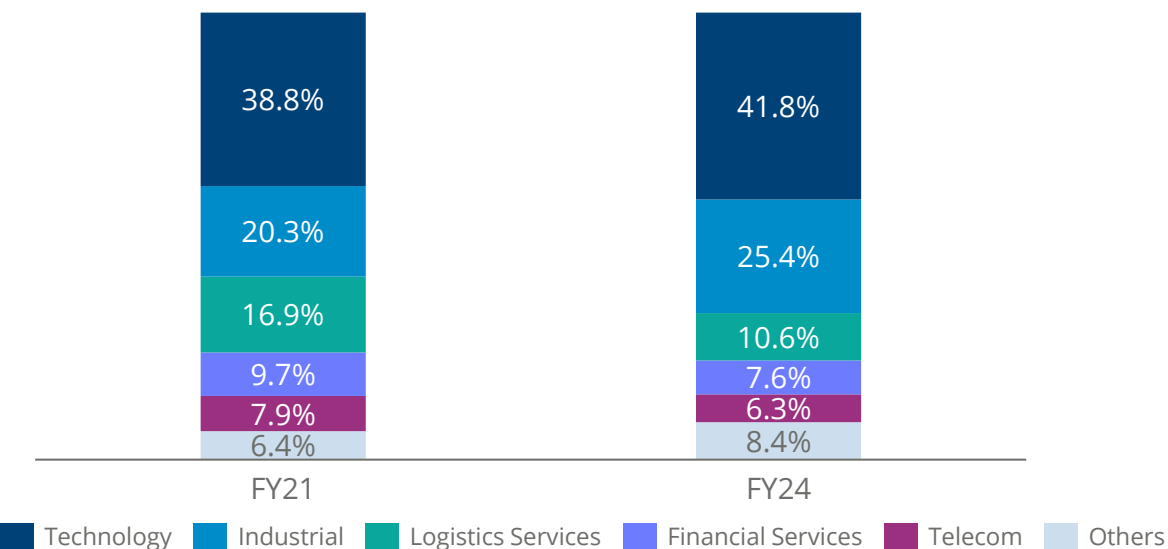
Demonstrated Growth in Revenues*



New Order Wins Continue...



Diversified across industries

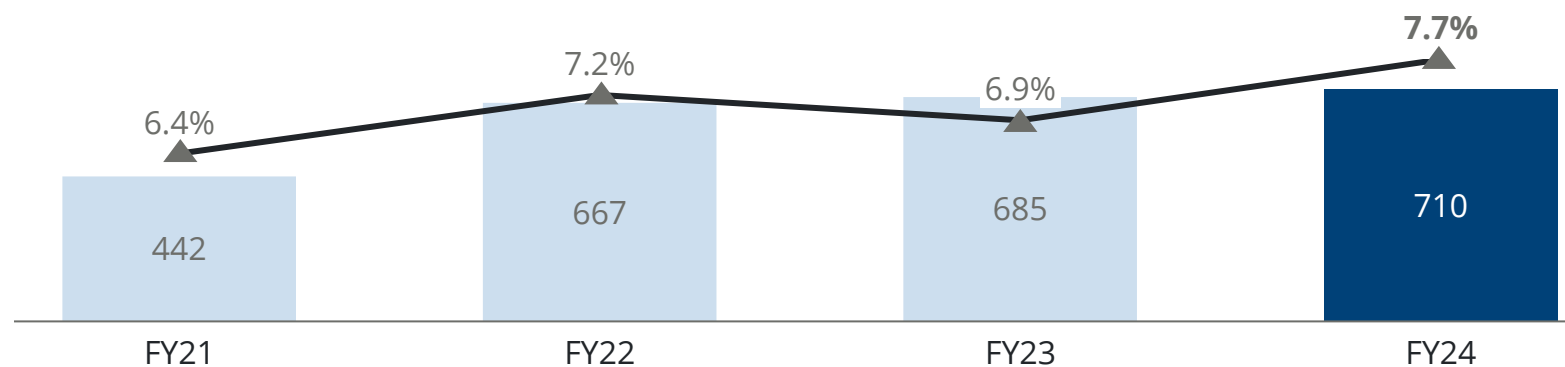


Key Highlights

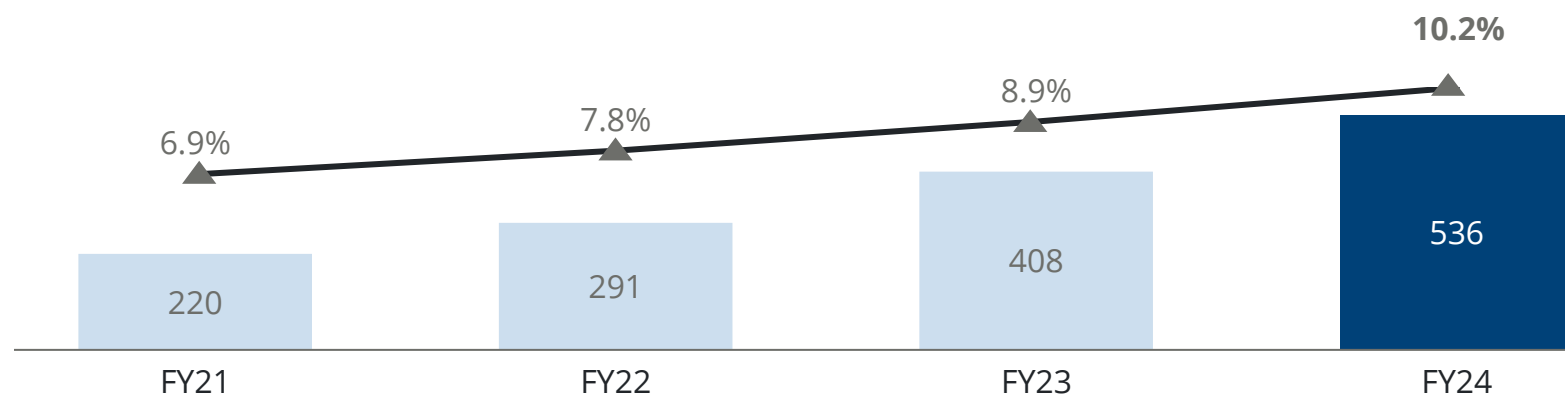
- ✓ Revenues continue to steady on account of new business development and encirclement
- ✓ End user industry demand is strong, and we expect the trend to continue
- ✓ **Outlook:** We continue to focus on our margins in IFM segment. We are implementing certain cost rationalization measures to boost our margins

Positive Margin Trajectory

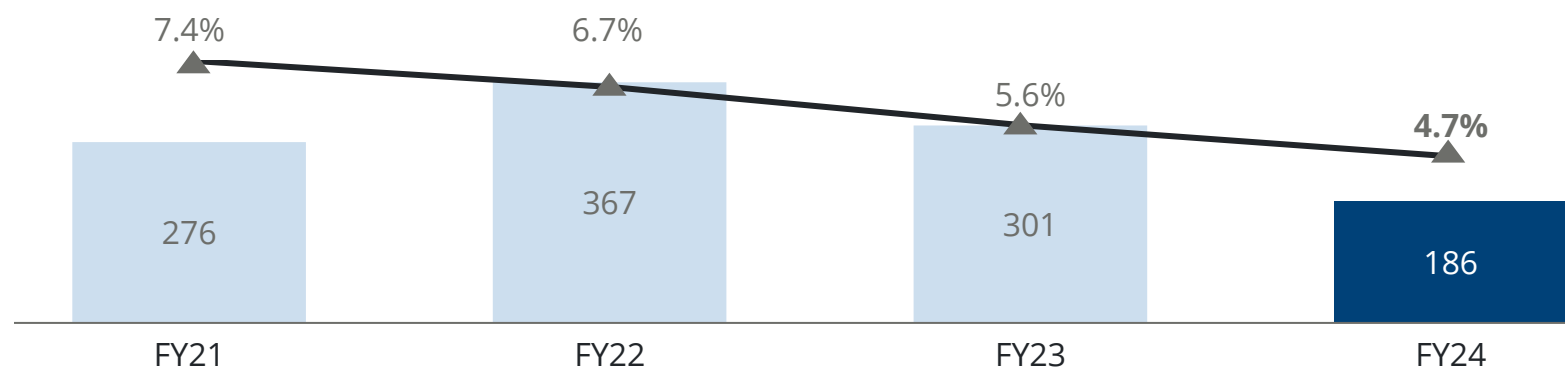
Consl. Adj. EBITDA



ISCS Adj. EBITDA



NS Adj. EBITDA



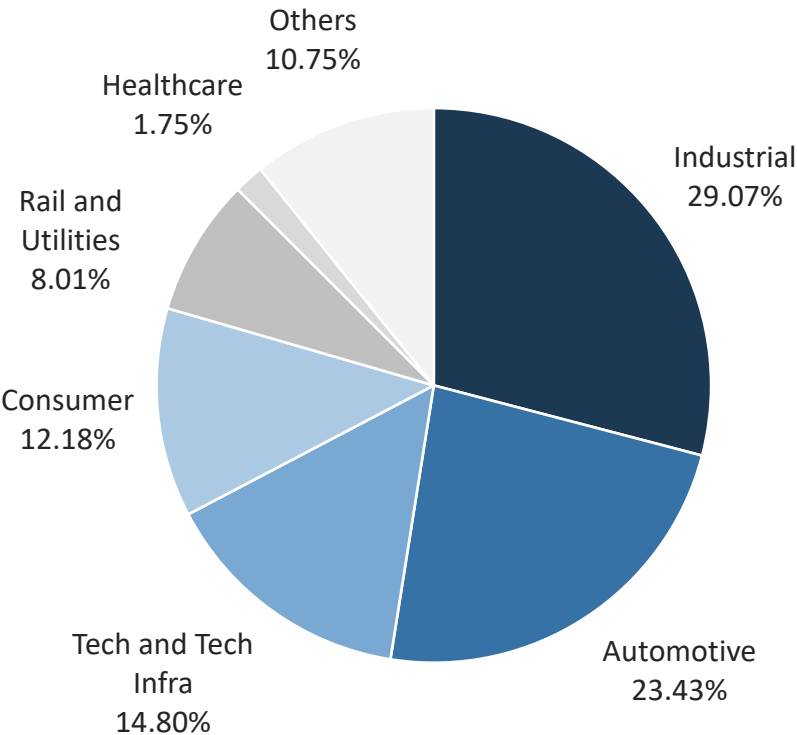
Levers of Margin Expansion

- ✓ Since FY21, our consolidated margin has expanded by **130 bps**, driven by the strong performance of the ISCS segment and ongoing initiatives to enhance the efficiency of the NS segment
- ✓ In the ISCS segment, we have successfully acquired new large customers across key geographies and increased wallet share from existing clients. Leveraging digital initiatives, we have achieved significant operational efficiencies
- ✓ In the NS segment, the performance of the GFS division has been impacted by normalizing freight rates and geopolitical tensions. To manage these challenges, we have taken strong cost control measures and driven procurement efficiencies. The positive impact of these initiatives is expected to become more pronounced in the coming quarters

Diverse customer base with long term relationships

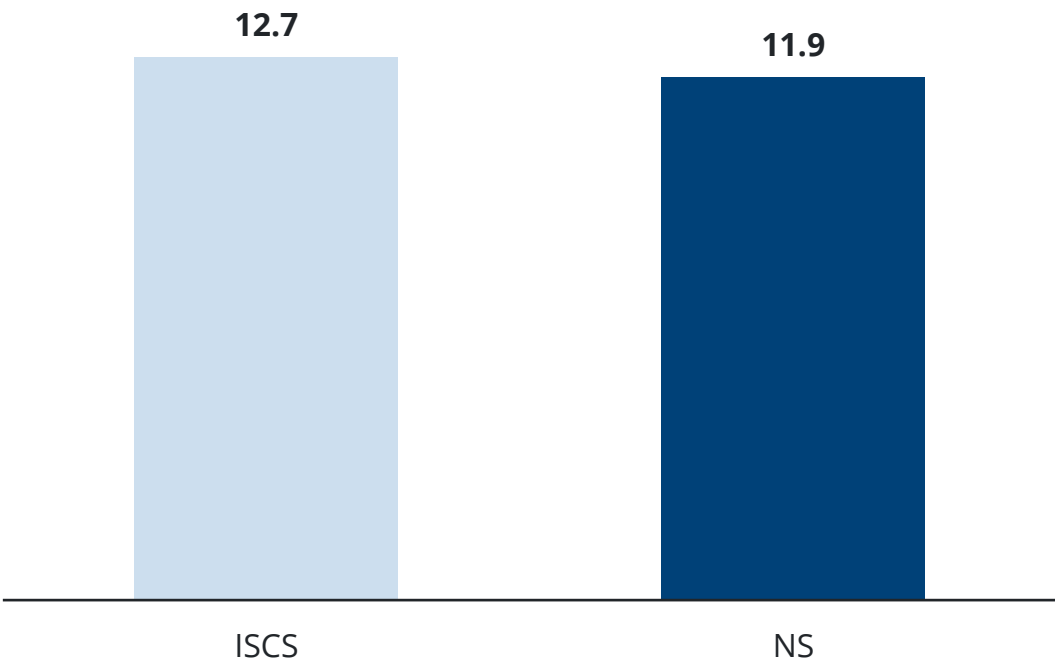
Diversified customer base

Consolidated Revenue by customer sector (FY24)



Long term customer relationships

Avg. length of relationships: of top 10 customers in FY24



No. of Fortune 500 customers

FY21

54

FY22

61

FY23

72

FY24

78

FY24 Proforma Profit & Loss Statement

Continuing operations	FY24	Proforma FY24*	FY23
Revenue from operations	9,200.0	9,200.0	9,994.4
Other Income	54.8	54.8	75.6
Total Income	9,254.8	9,254.8	10,070.0
Total material related costs	1,661.3	1,661.3	1,383.4
Freight, clearing, forwarding and handling charges	2,327.8	2,327.8	3,732.9
Sub-contracting costs and Casual labour charges	1,451.5	1,451.5	1,430.6
Total Variable Expense	5,440.7	5,440.7	6,546.9
Variable Margin	3,759.3	3,759.3	3,447.5
Variable margin (%)	40.9%	40.9%	34.5%
Employee Cost	2,243.2	2,243.2	2,010.6
Other Expenses	825.4	825.4	774.7
Total Fixed Expense	3,068.6	3,068.6	2,785.3
EBITDA	690.7	690.7	662.2
EBITDA Margins (%)	7.5%	7.5%	6.6%
ESOPS	-3.3	-3.3	-22.0
Add : Loss on Forex Translations	-16.2	-16.2	-1.0
Adjusted EBITDA	710.2	710.2	685.1
Adjusted ETBIDA Margins (%)	7.7%	7.7%	6.9%
Depreciation	556.7	556.7	501.5
EBIT	133.9	133.9	160.6
Finance Cost	202.7	163.8	185.1
Share of Profit from TVSILP	4.3	4.3	4.8
Profit before Exceptional Items & Tax	-9.6	29.3	55.9
Exceptional Items	-26.4	-26.4	-10.0
Profit before Tax	-36.1	8.9	45.9
Profit before Tax Margin (%)	-0.4%	0.1%	0.5%
Tax	21.7	21.7	-1.7
Profit After Tax	-57.7	1.1	47.7
PAT Margins (%)	-0.6%	0.0%	0.5%
PAT (before Exceptional items)	-31.1	27.4	57.7

Savings in Interest cost
~₹ 35 Crs+

Select Case Studies

Case Study - Polarized Light damage detection



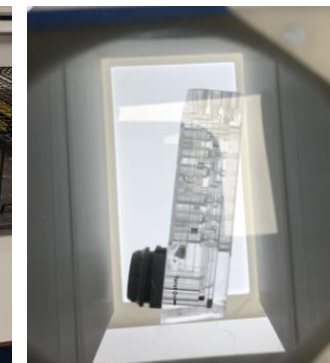
Problems

- Microscopic cracks in plastic are a hygiene problem in soda guns
- Human detection skilled, time consuming and prone to error



Solutions

- ✓ Illuminate with polarized light to highlight the damage
- ✓ Train an AI model to detect damage
- ✓ Package this as a full solution to evidence work to the customer



AI DRIVEN PROCESS



Solutions

- ☐ Halve headcount
- ☐ Double throughput
- ☐ Near 100% accuracy
- ☐ Happy customer

Revolutionizing Warehousing Through Technology-Driven Solutions

Client

Leading Indian multinational home appliances co.

Industry

Electronics

Issues

- Inefficient space management
- Non-compliance of SOPs
- Inventory mismanagement
- Late order execution leading to high operating costs
- Revenue leakage
- Customer dissatisfaction

Key Requirement

- 1 Complete overhaul and design new supply chain network
- 2 Integration of Warehouse management system with Customer's ERP
- 3 Reduce Inventory variance and damage, monitor solutions
- 4 Reduce transportation time and increase visibility of transport operations

Case Study



Services Provided

- ✓ Supply Chain Consultancy
- ✓ Warehouse Design
- ✓ Inventory Automation
- ✓ Warehouse Management
- ✓ Transport Management



Solutions

Digital Solutions

- ✓ TVS SCS WMS with integrated tracking
- ✓ Integrated TVS SCS WMS with customer ERP
- ✓ Control Tower
- ✓ Predictive analytics to forecast increased demand for supply chain agility

Business Solutions

- ✓ Designed new supply chain network
- ✓ Inventory and Transport Consolidation

Results



Streamlined process and enhanced quality



Increased uptime resulting in increased production



Reduced cost of operations



Improved TAT & overall efficiency

Case Study - Automotive



Client

Leading Indian two-wheeler manufacturer

Industry

Automotive

Service Offering

Optimized the network to ensure error free deliveries



Inaccurate and damaged exports resulted in irate dealers, dormant inventory, and missed sales opportunities



Overview & Challenges

The company was exporting CKD kits to 75 countries.

Facing multiple issues **with errors in shipment and damage of the CKD kits** on arrival.

The company was unable to meet the market demand and was having a bad experience in shipping the right parts, airlifting missing packages, and replacing damaged parts.

Key Requirements

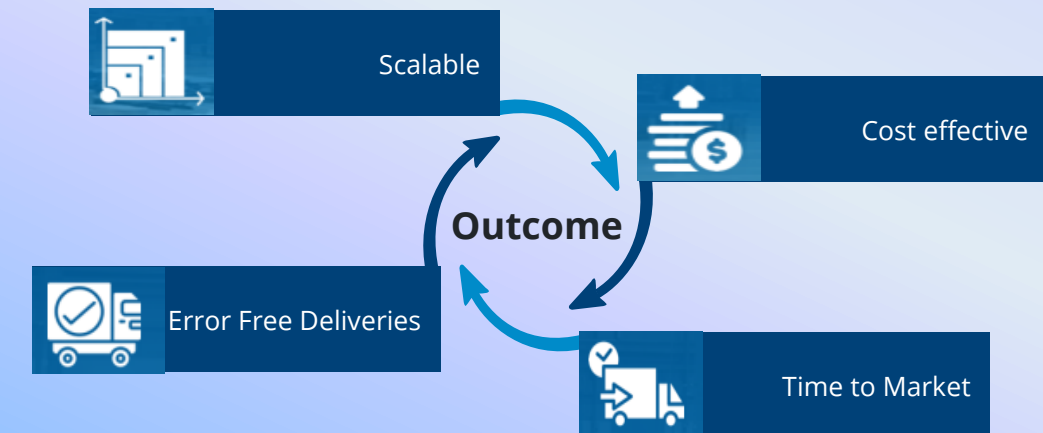


Solutions

- ✓ System initiates packing when 100% of the parts are available
- ✓ MHE moves the material to the next station only when the right parts are packed
- ✓ Cameras monitor and alert operator's absence at a station
- ✓ Efficiency and speed are achieved through material lifts, spiral chutes, belt conveyors, pallet former, custom trolleys etc.
- ✓ Digitized Poke - Yoke validation ensures defect free delivery
- ✓ Plant capacity of 1000 bikes/day; Prepack storage - 3000 Bins, FG Storage - 3800 Pallets, 12 Inbound, and 4 Outbound docks

Results

TVS SCS responded with a cutting-edge, purpose-built **warehouse automation solution** that achieved the goal of **error-free deliveries in less than 3 months**



Tech Excellence: Driving Business Growth

We provide **Tech Enabled Solutions** customized to meet **specific customer needs**,
optimizing costs and **maximizing efficiency**

Transport Management

i-Loads

One stop E2E platform for truck management, delivery tracking, billing, performance reporting



Warehouse Management

Visibility

Inventory management solution using RFID technology coupled with barcodes



Freight Management

LCL Consolidator

Enable automated decision making on container closing providing real time cargo visibility



e-connect

Online tracking system with 24/7 visibility of goods down to order item level

Supply Chain Management

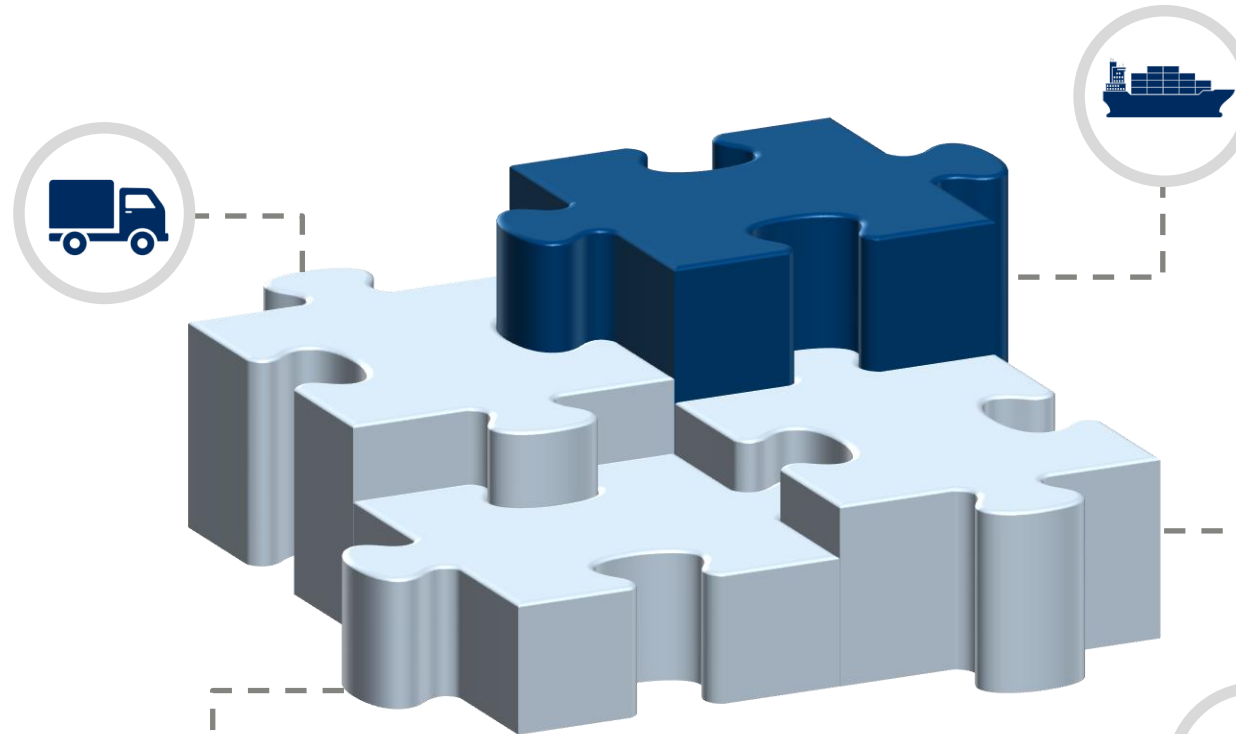
Msys

Product data management, demand forecasting. Warehouse management, business data & Analytics



Courier Alliance

Marketplace to match courier partner with customer demand ensuring speedy completion of last mile delivery





Thank You

Company: TVS Supply Chain Solutions Limited

CIN: U63011TN2004PLC054655



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For updates and specific queries, please visit

www.tvsscs.com

Investor Relations: Strategic Growth Advisors Pvt. Ltd.

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