



STRICTLY PRIVATE AND CONFIDENTIAL

TVS Supply Chain Solutions

Q2 & H1FY25 Earnings Presentation

November 2024



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Q2 & H1FY25

Financial Performance

From the desk of MD



Ravi Viswanathan
Managing Director

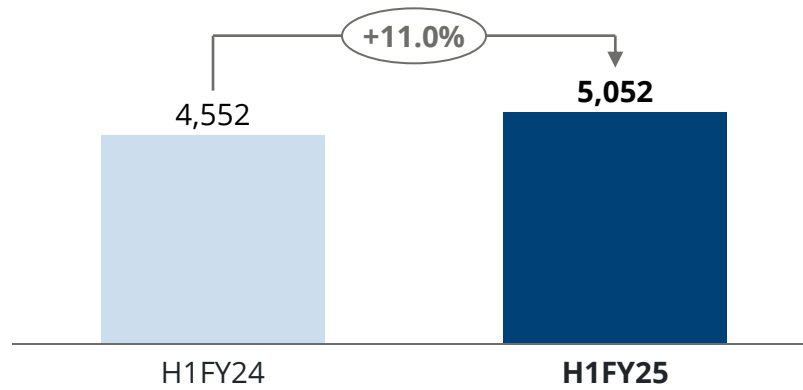
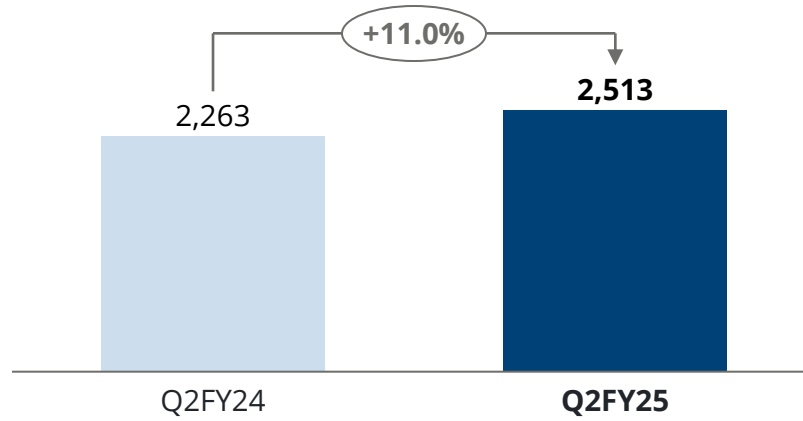
Commenting on the Q2 & H1FY25 performance, Mr. Ravi Viswanathan; Managing Director – TVS Supply Chain Solutions Limited said :

“The Q2 results demonstrate our ability to sustain growth momentum in both revenue and profit, amid ongoing macroeconomic challenges. New business wins have added ₹280 Crores of revenue for the quarter. Our global account management strategy has helped us close the large deals that gives us the confidence of sustaining the growth momentum.

Overall, the results reflect our resilience in navigating a complex environment and we remain confident about our profitable growth in the coming quarters.”

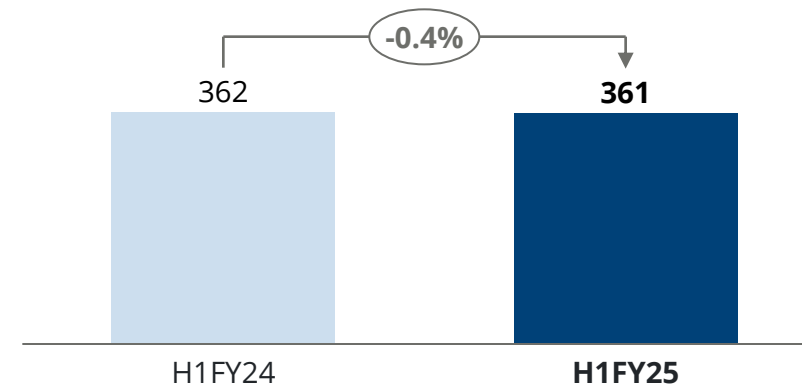
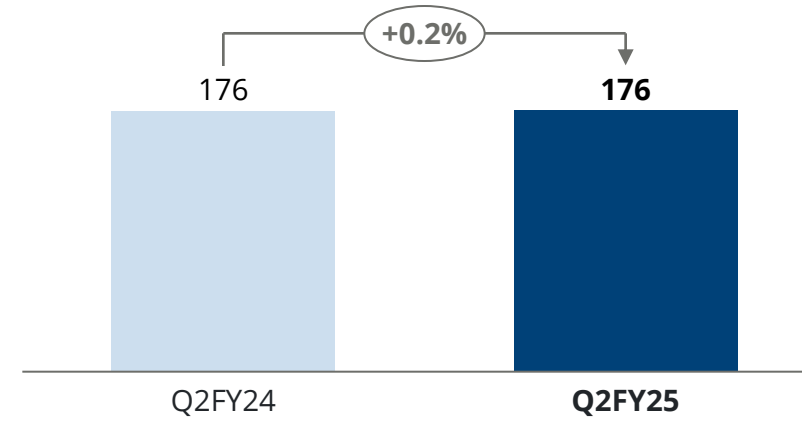
Financial Snapshot

Revenue

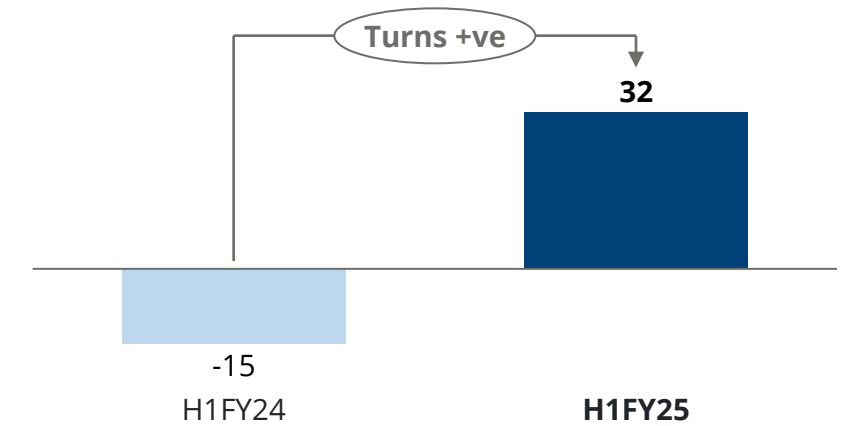
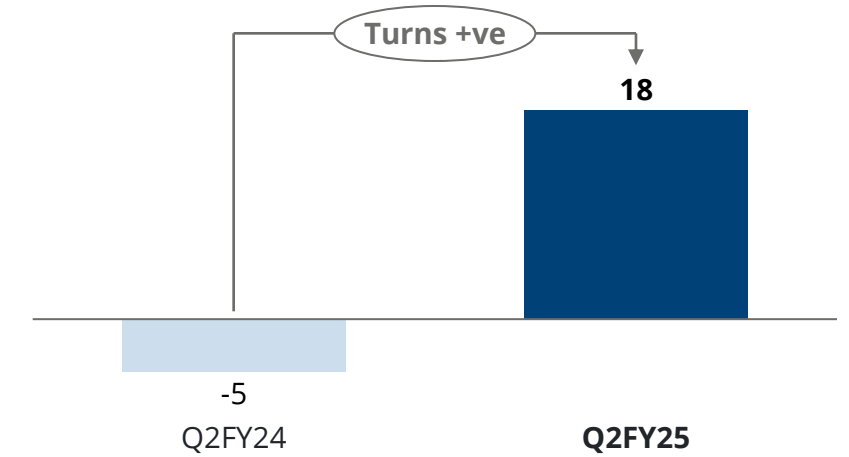


New Business Wins
INR 280 Crs

Adj. EBITDA



PBT (before exceptional items)



Robust BD Pipeline
INR 4,500 Crs

Executive Summary

Business update:

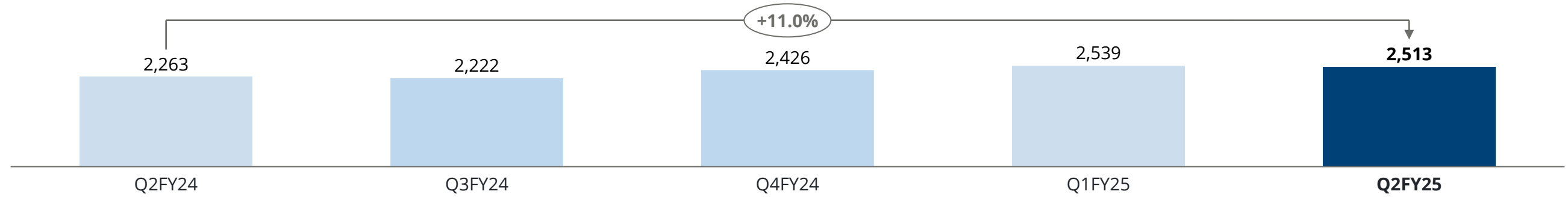
- Won a significant new contract in excess of ₹ 2,200 cr. with a large industrial customer in North America.
- Won a 7-year strategic contract with a UK Governmental agency to offer critical systems spares & support, ensuring enhanced availability and operational readiness of the customer worldwide.
- Secured a 3-year business contract from a leading manufacturer of earth moving and construction equipment for managing their in-plant warehousing and logistics operations.

Tech update:

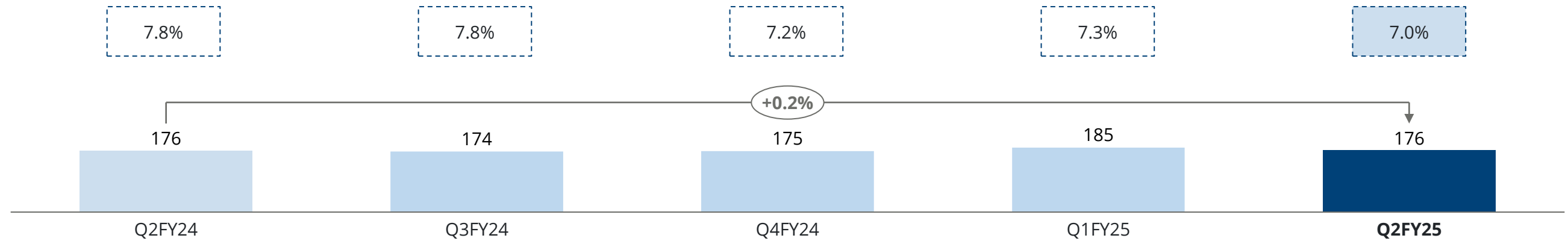
- Delivered an end-to-end IT solution from order-to-cash and procurement-to-pay for a key Auto OEM based in Singapore.
- Successfully moved to ISO27001 standards in Singapore and USA with no open non-conformances as part of security offerings.
- Deployed AI led Polarized Light Damage Detection service offering for Beverage Clients in UK.
- Implemented AI led Auction price and target bidding for Courtier business in Europe.

Revenue, Adj EBITDA and Profitability

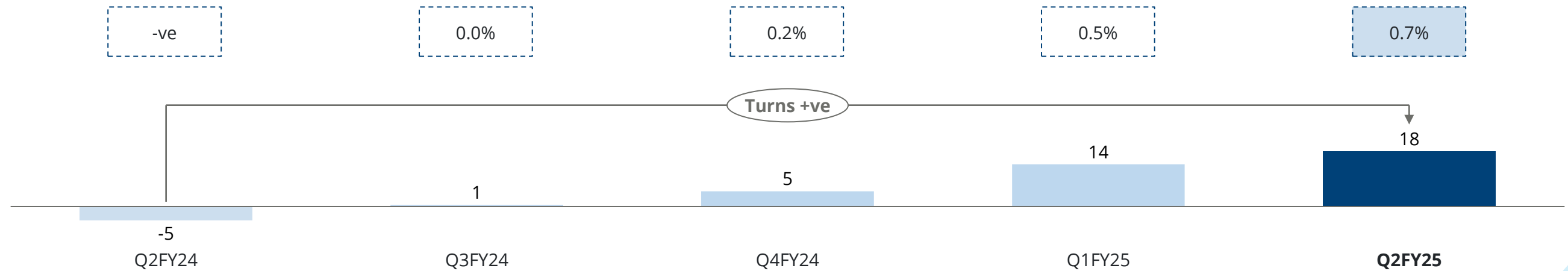
Revenue



Adj. EBITDA & Margin



PBT & PBT Margin



Margins

Key Highlights

	Integrated Supply Chain Solutions (ISCS)	Network Solutions (NS)
Quarterly Performance	<ul style="list-style-type: none"> ✓ Q2 revenue: ₹ 1,349 Cr; grew 6.2% YoY ✓ Q2 Adj. EBITDA: ₹ 149 Cr; growth of 15.2% YoY ✓ Adj. EBIDTA Margins stood at 11.1%, indicating high operating leverage ✓ RoW business grew at a strong 15.3% 	<ul style="list-style-type: none"> ✓ Q2 revenue: ₹ 1,164 Cr; grew by 17.2% YoY ✓ Q2 Adj. EBITDA: ₹ 27 Cr; de-grew by 44.6% YoY ✓ Adj. EBIDTA Margins stood at 2.3%, margins were impacted on account of Red Sea surcharge levied
H1FY25 Performance	<ul style="list-style-type: none"> ✓ H1FY25 revenue: ₹ 2,774 Cr; grew 7.2% YoY ✓ H1FY25 Adj. EBITDA: ₹ 287 Cr; growth of 6.7% YoY ✓ Adj. EBIDTA Margins stood at 10.4% ✓ RoW business grew at a strong 16.8% 	<ul style="list-style-type: none"> ✓ H1FY25 revenue: ₹ 2,278 Cr; grew by 16.0% YoY ✓ H1FY25 Adj. EBITDA: ₹ 77 Cr; de-grew by 17.9% YoY ✓ Adj. EBIDTA Margins stood at 3.4% ✓ Ocean freight volumes grew 3.2% YoY
FY 25 Outlook	<ul style="list-style-type: none"> ✓ ISCS momentum expected to continue in H2 FY25 supported by a healthy pipeline and continued focus on margin 	<ul style="list-style-type: none"> ✓ Focus on improving profitability in H2 FY25 ✓ IFM - we expect target run rate profitability by H2 FY25

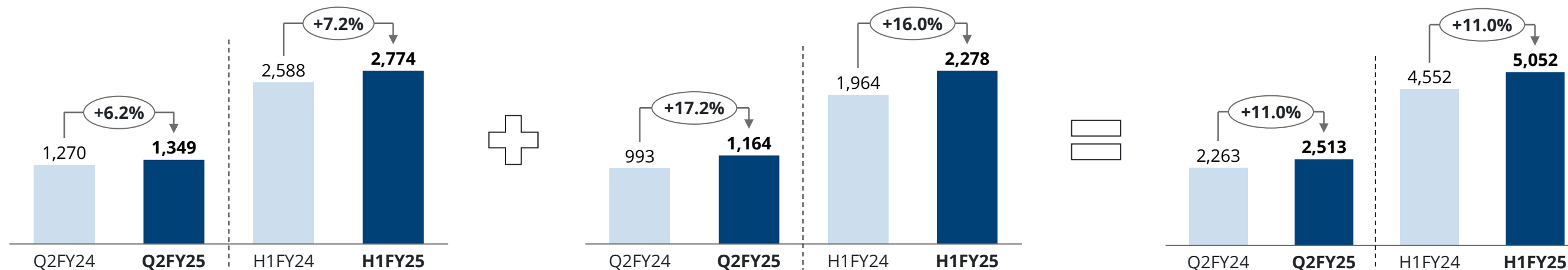
Segment wise Revenue and Adj EBITDA: 11% YoY growth in revenue driven by consistent revenue performance in ISCS and improved volume in GFS

ISCS Segment (In ₹ Cr.)

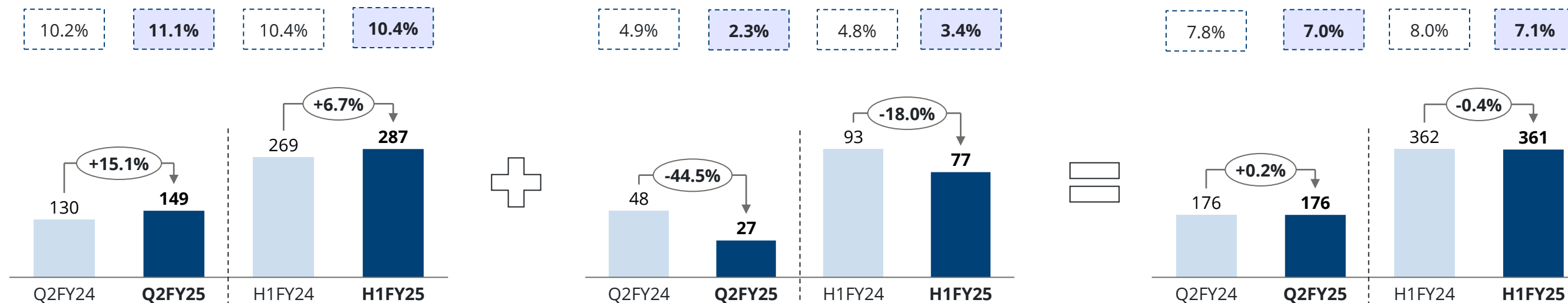
NS Segment (In ₹ Cr.)

Total (In ₹ Cr.)

Revenue



Adj. EBITDA & Margin



Margin improvement on account
of **High Operating Leverage** &
Cost optimization

Margins were impacted on
account of **Red Sea
surcharge** & **One time cost
impact in IFM**

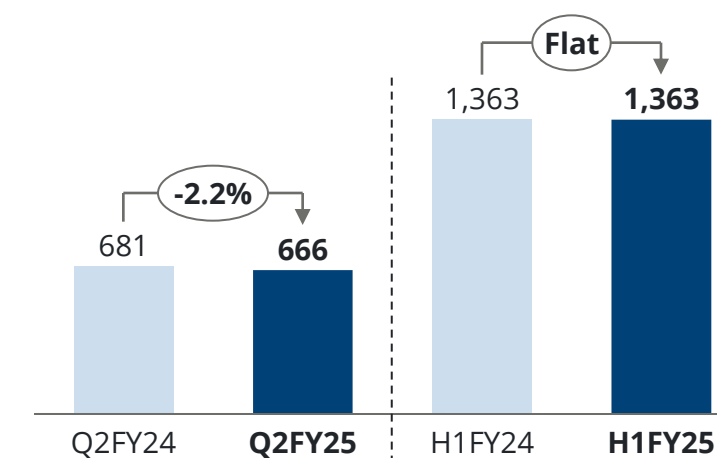
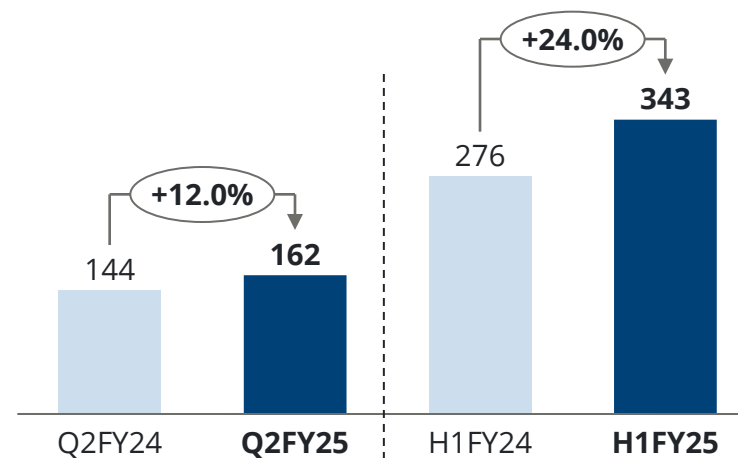
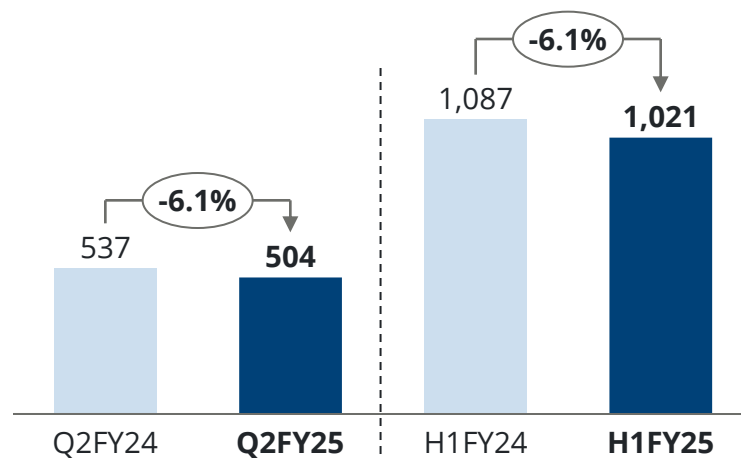
Geography wise Revenue

ISCS Segment (In ₹ Cr.)

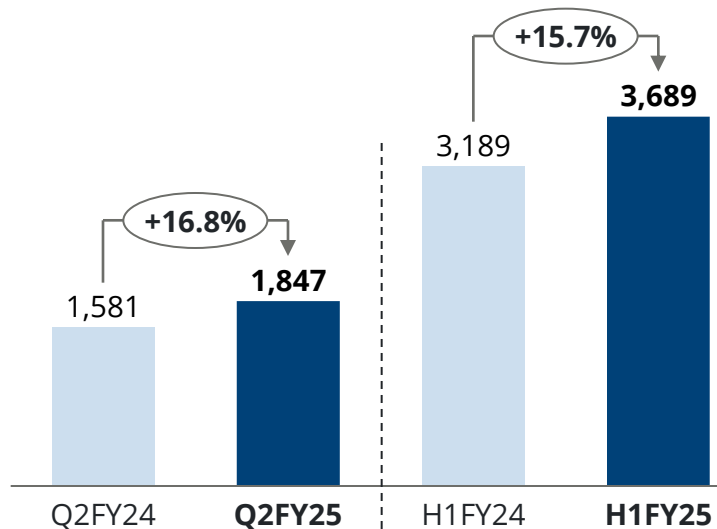
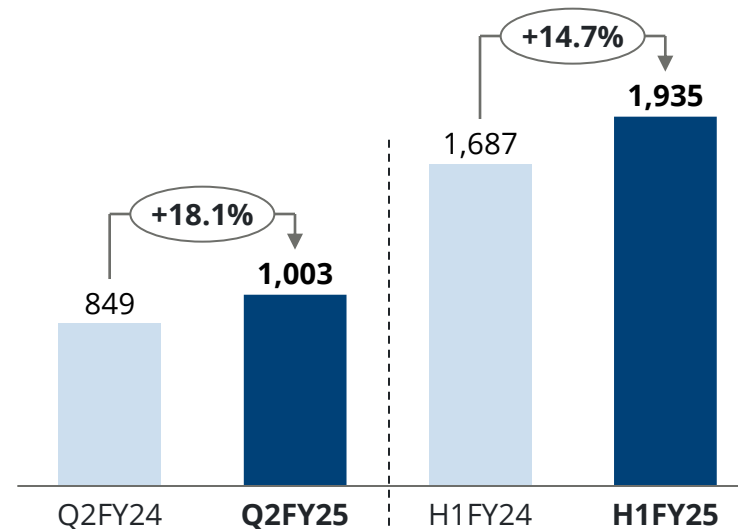
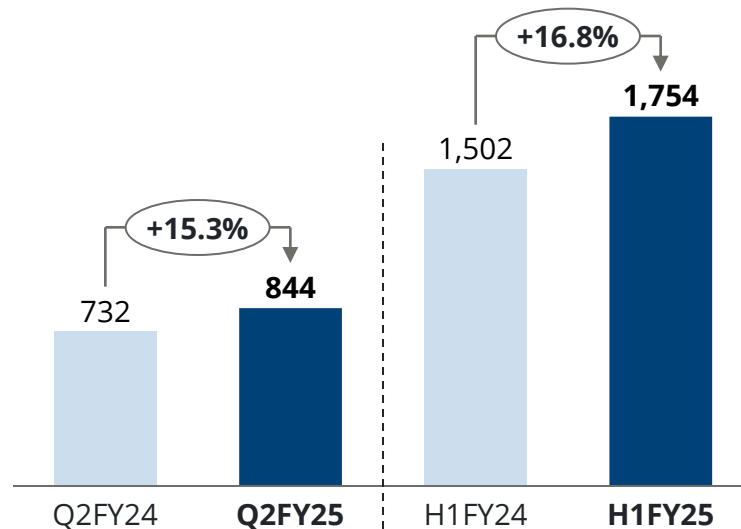
NS Segment (In ₹ Cr.)

Total (In ₹ Cr.)

India

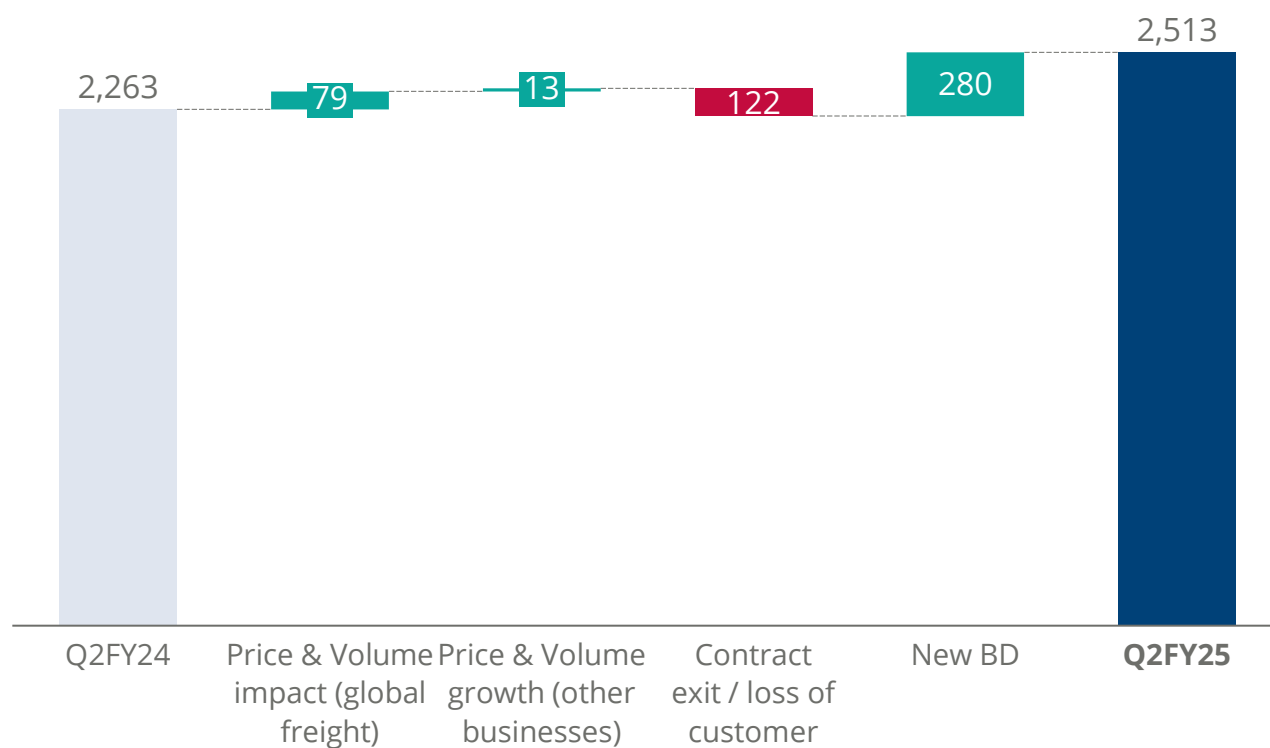


RoW

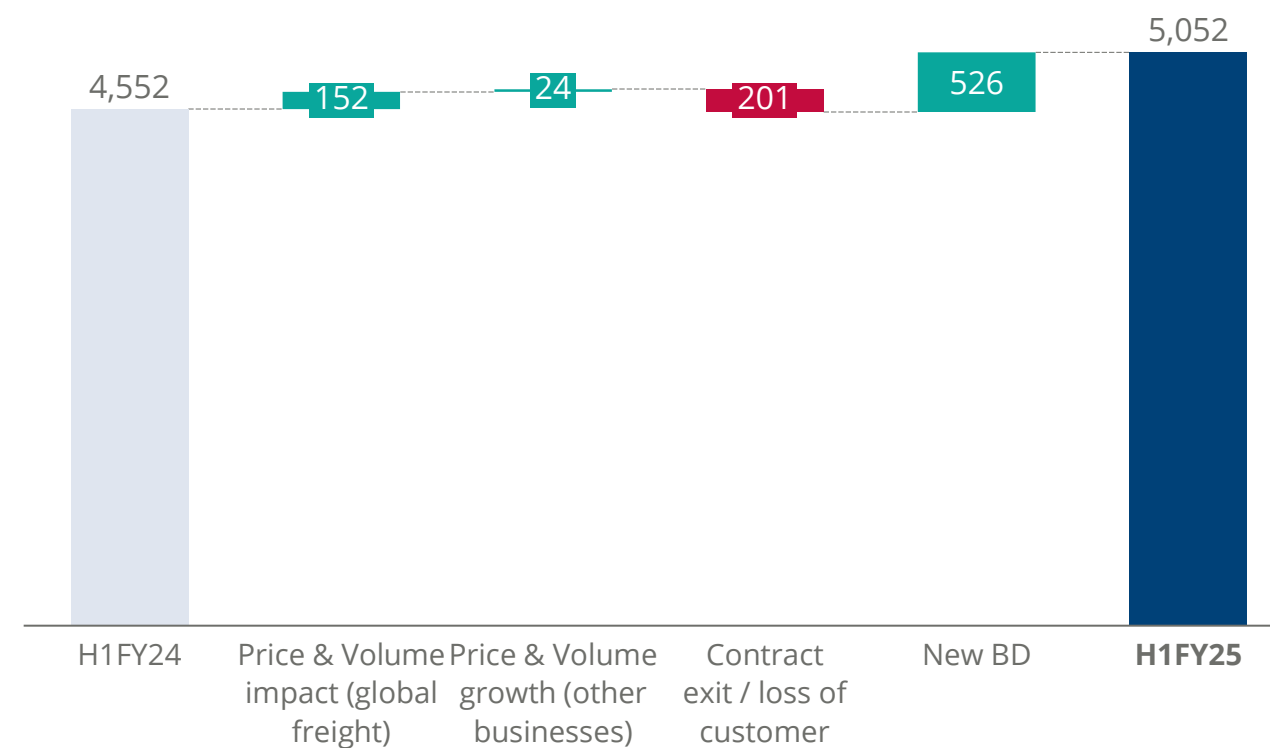


Strong new business delivery

Revenue bridge: Q2FY24 to Q2FY25 in ₹ Cr



Revenue bridge: H1FY24 to H1FY25 in ₹ Cr



New Business development of Rs. 280 Cr translates to 12.4% Q2 FY 24 Revenue

Robust Pipeline continues to propel the revenue growth

Key Opportunities in India

Integrated 3PL solution for leading supplier of braking systems

Integrated transportation solution for a European based global automobile manufacturer

Warehousing solution for a leading industrial automation & technology provider

Warehousing and transportation solution for PV/CV manufacturer

Transportation and packaging solution for a Metal forgings manufacturer

Warehousing solution for a leading footwear manufacturing company

Key Opportunities in RoW

Near Term Opportunities

Transportation solution for a global auto/truck manufacturer

Transportation solution for a Auto component maker

Technical Repair solution for a Technology based company

Final Mile tech solution for Information & Comm. company

Air and Sea solution for Multinational engineering/Auto OEM

Long gestation opportunities

Field Service management solution for a large Retail chain

Integrated 3PL solution for defence contractor

Integrated Supply Chain solution for a leading food and beverages company

Business development efforts yielding consistent results

ISCS Segment

Global Auto OEM

Leading global
beverages company

Global
Engine/Generator
manufacturer

Global Agri Equipment
company

Kitchen equipment
manufacturing company

NS Segment

Global
Engineering/Equipment
manufacturing company
(GFS)

System Integrator/ IT
Services company (IFM)

2/3-wheeler OEM

Developer and
manufacturer of
specialised chemical
compounds (GFS)

Global Digital
equipment
manufacturer (IFM)

Q2 & H1FY25 Profit & Loss Statement

In ₹ Cr - Continuing operations	Q2FY25	Q2FY24	Y-o-Y	H1FY25	H1FY24	Y-o-Y
Revenue from operations	2,512.9	2,262.9	11.0%	5,052.3	4,551.8	11.0%
Other Income	28.6	8.3		34.2	26.5	
Total Income	2541.5	2271.2	11.9%	5,086.5	4,578.3	11.1%
Total material related costs	434.3	365.8		923.0	782.4	
Freight, clearing, forwarding and handling charges	745.0	570.1		1,478.3	1,137.5	
Sub-contracting costs and Casual labour charges	366.0	380.3		709.5	756.6	
Total Variable Expenses	1,545.4	1,316.1		3,110.8	2,676.4	
Variable Margin	967.5	946.8	2.2%	1,941.5	1,875.4	3.5%
Variable Margin (%)	38.5%	41.8%		38.4%	41.2%	
Employee Cost	576.2	572.8		1153.1	1122.6	
Other Expenses	222.4	188.9		437.7	397.3	
Total Fixed Expense	798.7	761.7		1,590.8	1,519.9	
EBITDA	168.8	185.1	-8.8%	350.6	355.5	-1.4%
EBITDA Margins (%)	6.7%	8.2%		6.9%	7.8%	
ESOPS	-0.2	0.0		-0.2	-3.3	
Add : Loss on Forex Translations	-7.1	9.3		-9.8	-3.2	
Adjusted EBITDA	176.1	175.7	0.2%	360.6	362.1	-0.4%
Adjusted EBITDA Margins (%)	7.0%	7.8%		7.1%	8.0%	
Depreciation	139.6	141.7		274.7	278.5	
EBIT	29.3	43.3		75.9	77.0	
Finance Cost	40.6	57.1		80.2	120.4	
Share of Profit from TVSILP	0.6	1.0		1.6	1.8	
Profit before Exceptional Items & Tax	17.9	-4.5		31.6	-15.2	
Exceptional Items	0.0	-3.2		0.0	-26.4	
Profit before Tax	17.9	-7.7	N.A.	31.6	-41.6	N.A.
Profit before Tax Margin (%)	0.7%	-0.3%		0.6%	-0.9%	
Tax	7.2	14.2		13.5	31.5	
Profit After Tax	10.6	-21.9	N.A.	18.1	-73.1	N.A.
PAT Margins (%)	0.4%	-1.0%		0.4%	-1.6%	
PAT (before Exceptional items)	10.6	-18.7		18.1	-46.7	

Balance Sheet

Assets (in ₹ Cr)	Sep-24	Mar-24
Non - Current Assets		
Property Plant & Equipment	357.7	340.8
Right of Use Assets	1,117.8	1,185.8
Goodwill	609.5	588.5
Other Intangible Assets	241.7	246.5
Other Non - Current Assets (Net)	343.0	348.7
Total Non-Current Assets	2,669.7	2,710.3
Current Assets		
Inventories	386.8	386.6
Financial Assets		
(i) Trade receivables	1,646.7	1,403.2
(ii) Cash and cash equivalents	329.8	509.4
(iii) Bank balances other than cash and cash equivalents	197.5	189.0
Other Current Assets	749.0	631.0
Total Current Assets	3,309.7	3,119.1
Total Assets	5,979.5	5,829.4

Equity & Liabilities (in ₹ Cr)	Sep-24	Mar-24
Equity		
Share Capital	44.1	44.1
Reserves & Surplus	1,811.9	1,771.0
Equity attributable to owners of the Company	1,856.0	1,815.0
Non-Controlling Interests	32.3	29.7
Total Equity	1,888.3	1,844.7
Non-Current Liabilities		
Financial Liabilities		
(i) Borrowings	2.1	2.8
(ii) Lease Liability	963.6	981.3
(iii) Other Financial Liabilities	2.2	2.9
Provisions	55.8	56.4
Deferred Tax Liabilities	45.8	58.7
Other non current liabilities	13.0	10.6
Total Non-Current Liabilities	1,082.4	1,112.7
Current Liabilities		
Financial Liabilities		
(i) Borrowings	891.5	791.2
(ii) Lease Liability	386.1	423.8
(ii) Trade Payables	1,413.5	1,368.2
(iii) Other Financial Liabilities	110.7	91.7
Other Current Liabilities	169.6	151.7
Current tax liabilities (net)	7.4	18.4
Provisions	30.0	26.9
Total Current Liabilities	3,008.7	2,871.9
Total Equity & Liabilities	5,979.5	5,829.4

Company Overview

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

We have two operating segments:

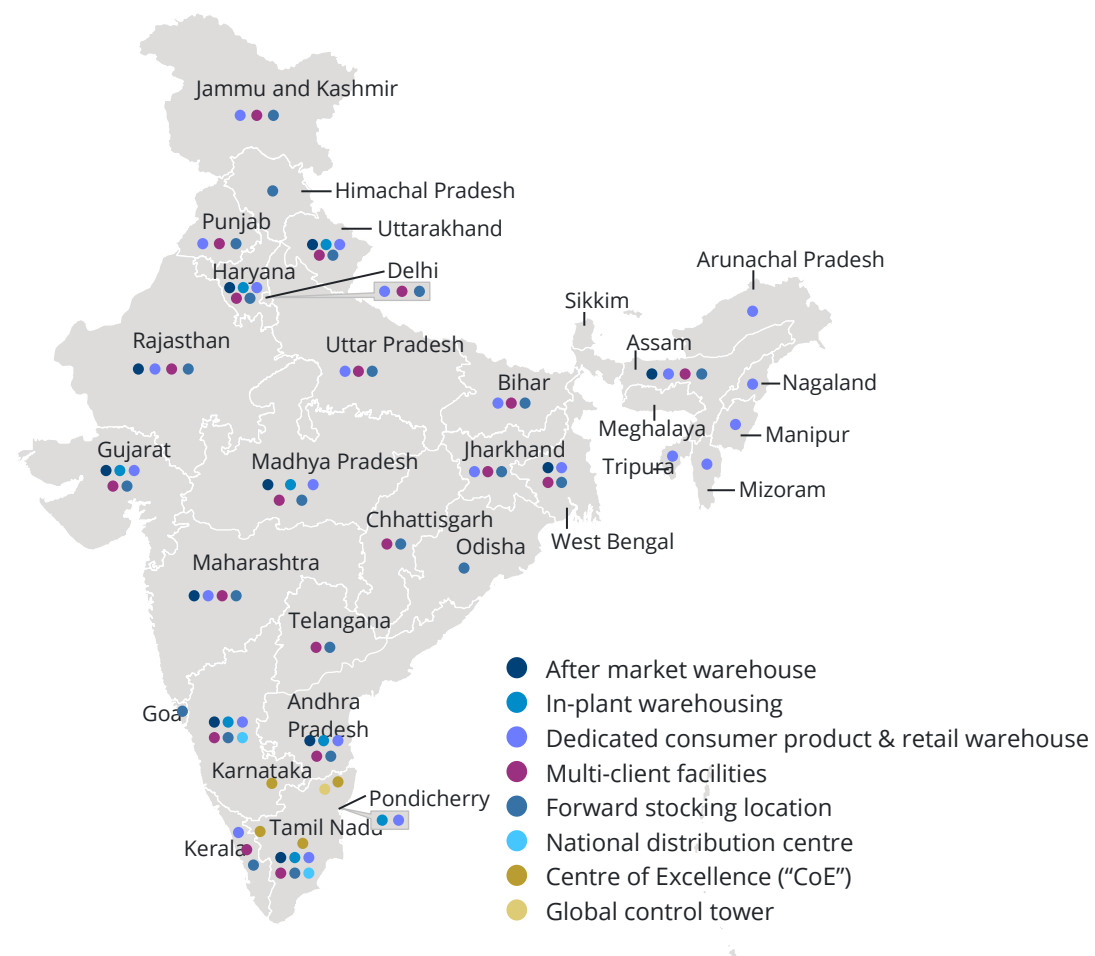


★ Integrated Supply Chain Solutions

★ Network Solutions

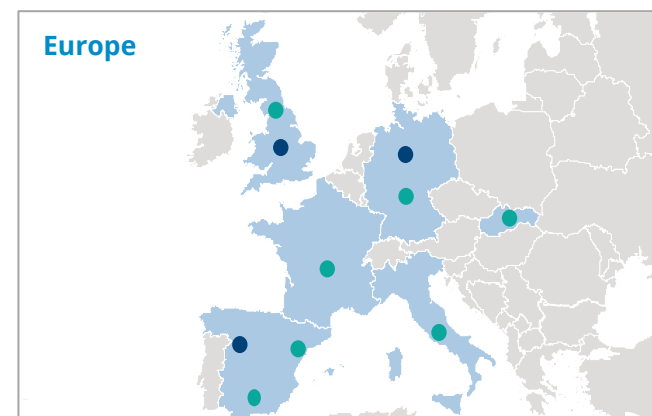
...with a global business headquartered in India...

We are present across India

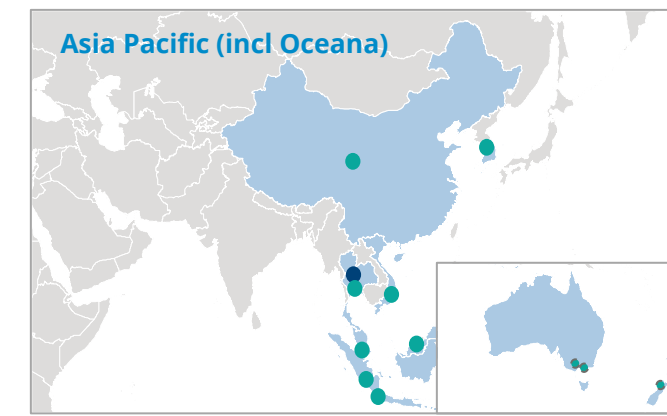


Total warehouse space: 20.8 Mn sft
No. of permanent employees: 13,110

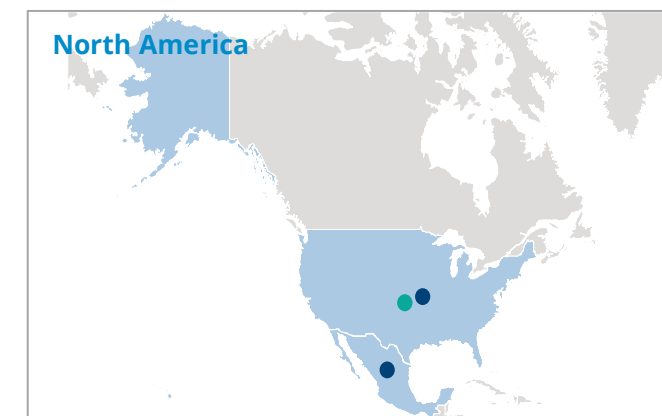
And globally across four continents



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

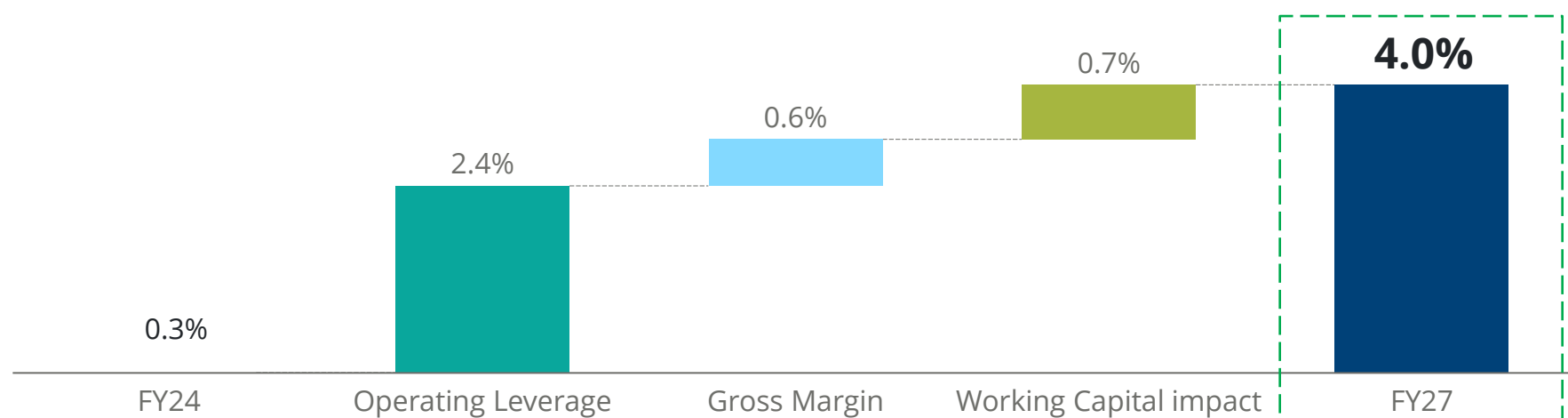
- ✓ Leverage our global network to expand into new markets
- ✓ Deepen presence in a country
- ✓ Continue to grow our global platform through targeted inorganic opportunities

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

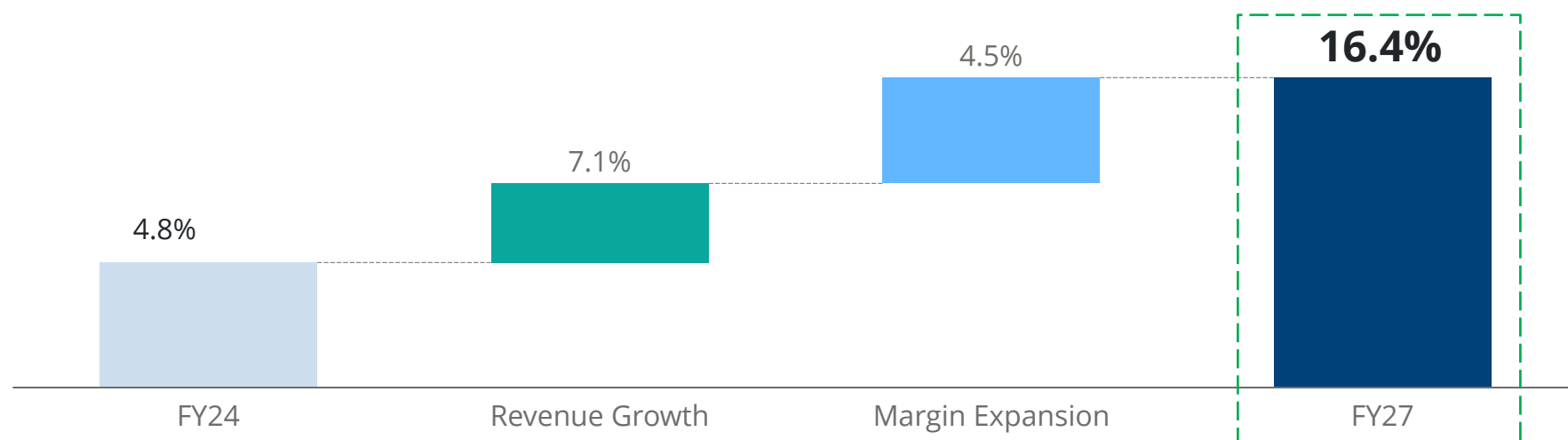
Profit Before Tax Margin (%)



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



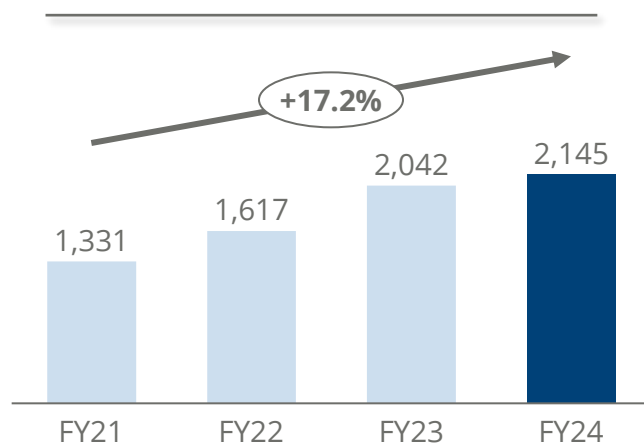
Our ISCS business has outperformed the GDP growth in the market we operate and has **grown at a CAGR of 17.8%** between FY21 & FY24

Continued Revenue
Momentum

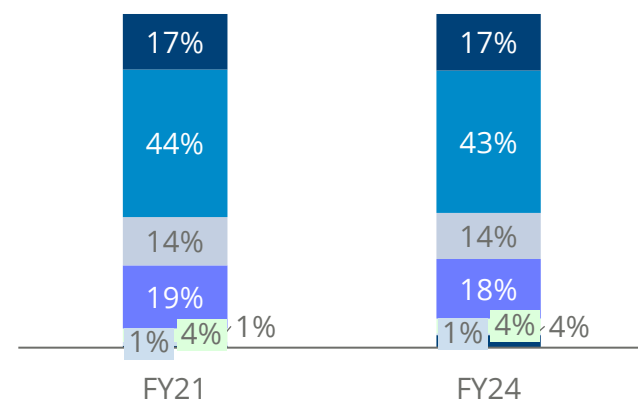


ISCS Consolidated

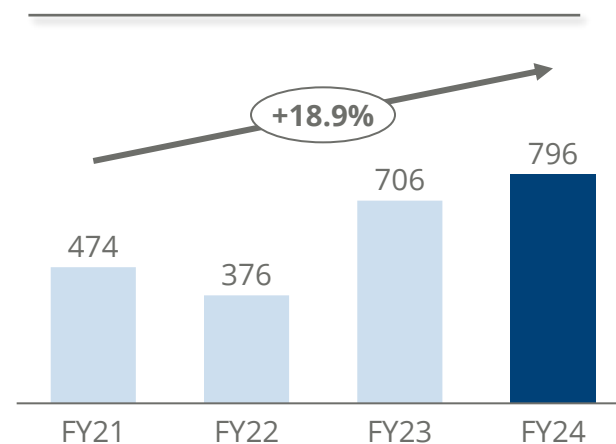
ISCS India Revenue



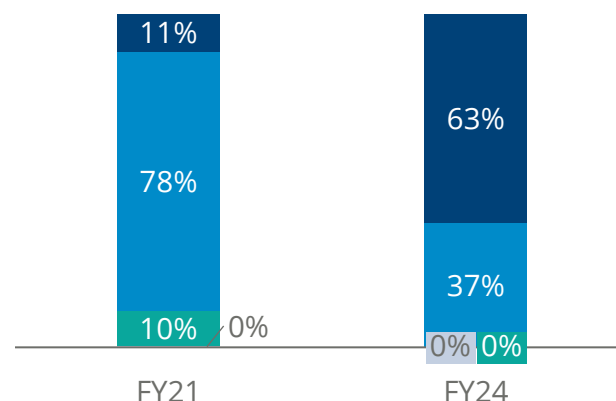
Industry Wise Breakup



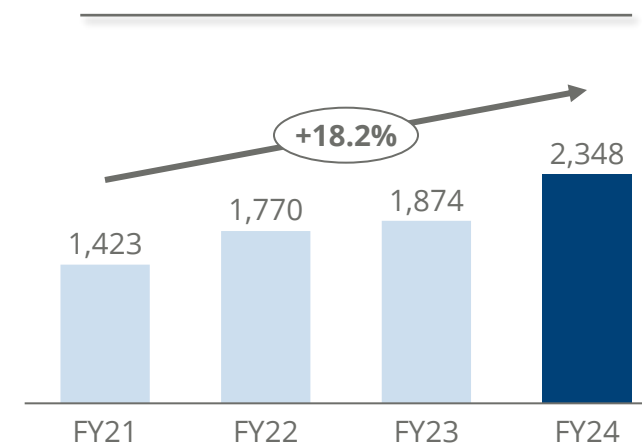
ISCS NA Revenue



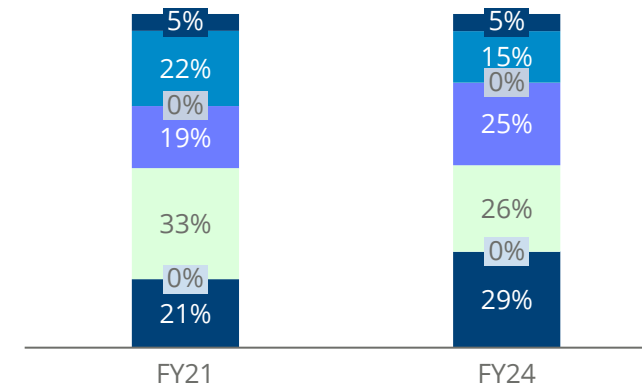
Industry Wise Breakup



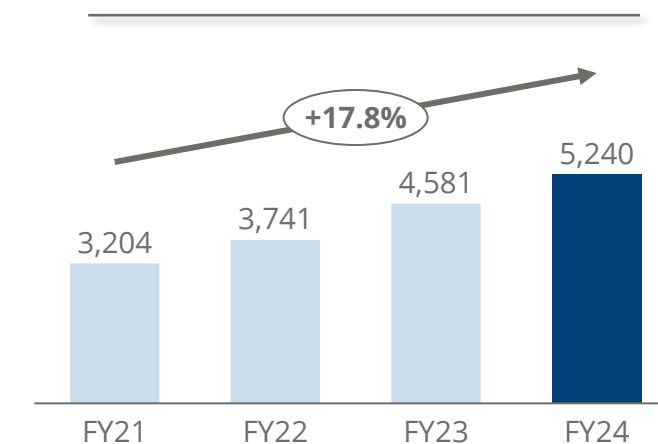
ISCS UK Revenue



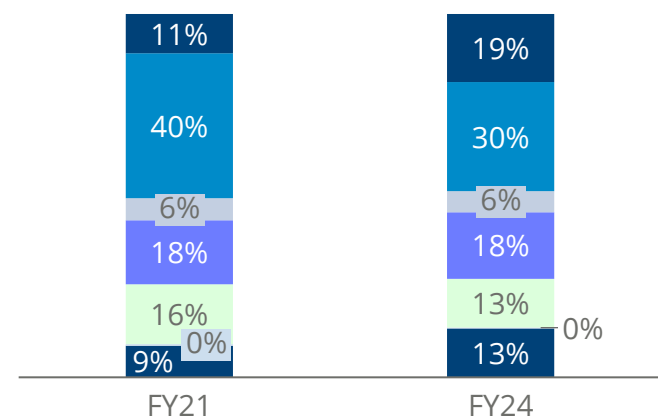
Industry Wise Breakup



Consolidated ISCS Revenue



Consolidated Industry Wise Breakup



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

Encirclement

■ Industrial
■ Automotive
■ Consumer
■ Others

Diversification

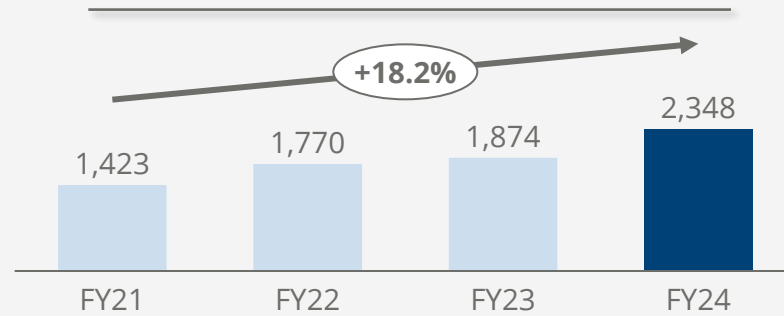
■ Industrial
■ Automotive
■ Tech and Tech Infra
■ Consumer
■ Rail and Utilities
■ Healthcare
■ Others

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

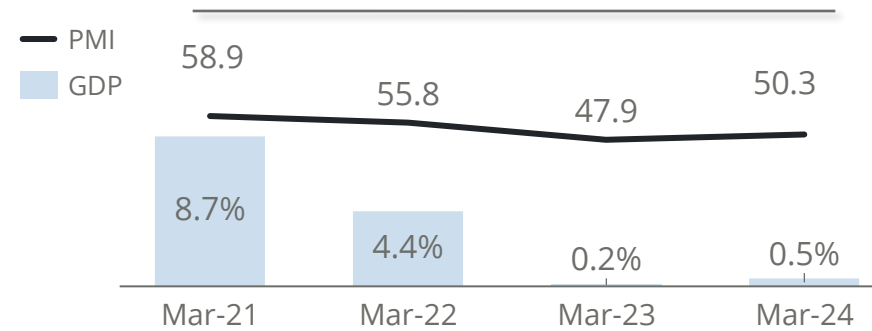
EBIT Margin Improvement

ISCS – UK Business

ISCS UK Revenue



UK GDP & Manufacturing Growth

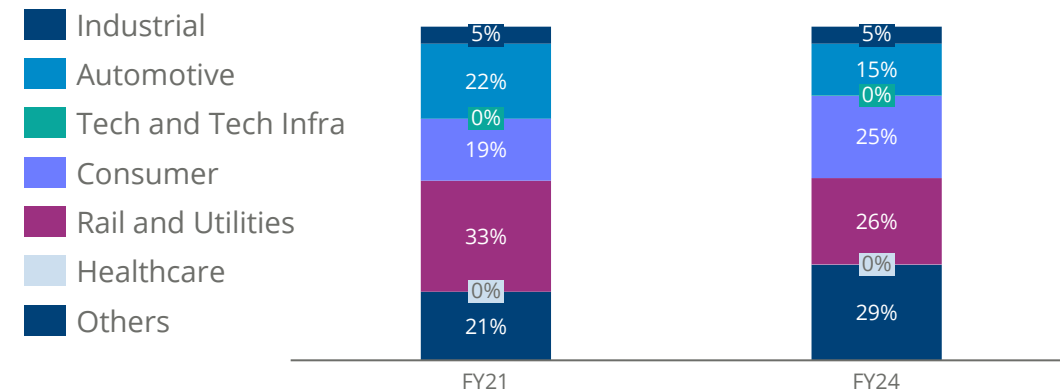


ISCS UK business grew by

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

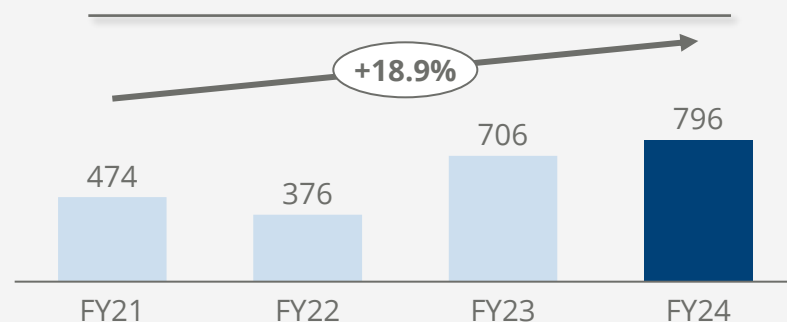
Addition of new customers across industries and adding multiple contracts across service lines

EBIT Margin Improvement

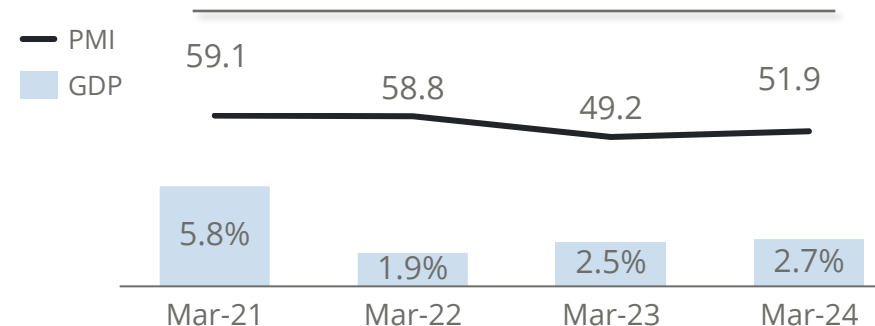
Contract level margin management coupled Operating leverage in line with medium term goals

ISCS – North America Business

ISCS North America Revenue

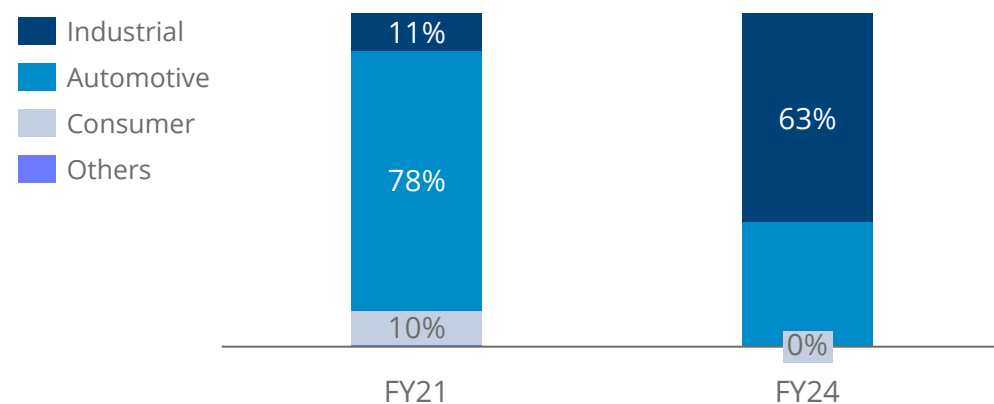


US GDP & Manufacturing Growth



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

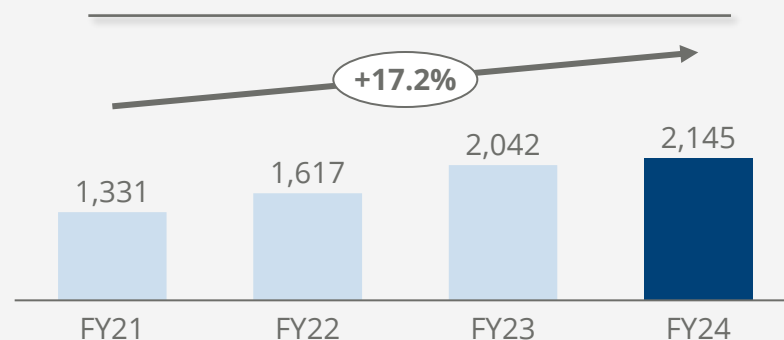
Addition of new customers across industries and adding multiple contracts across service lines

EBIT Margin Improvement

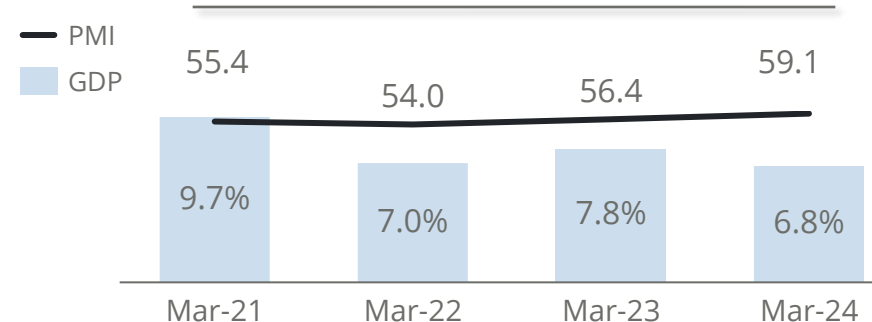
Contract level margin management coupled Operating leverage in line with medium term goals

ISCS – India Business

ISCS India Revenue



India GDP & Manufacturing Growth

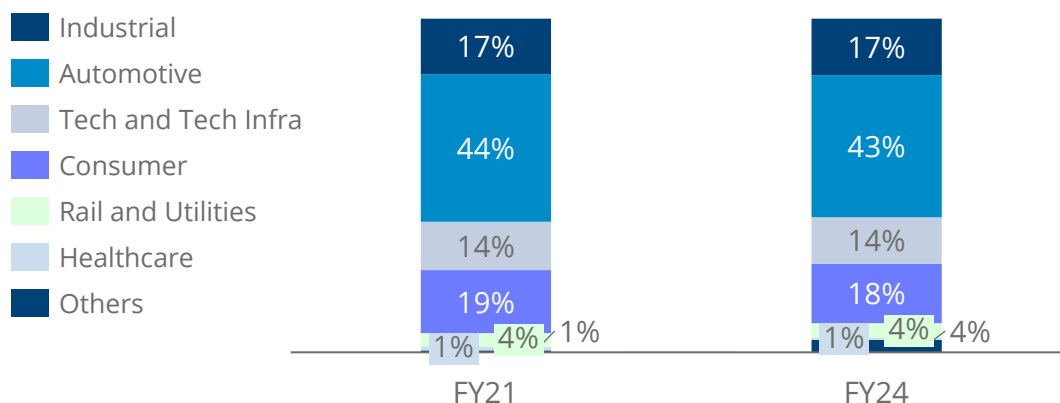


ISCS India business grew by

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

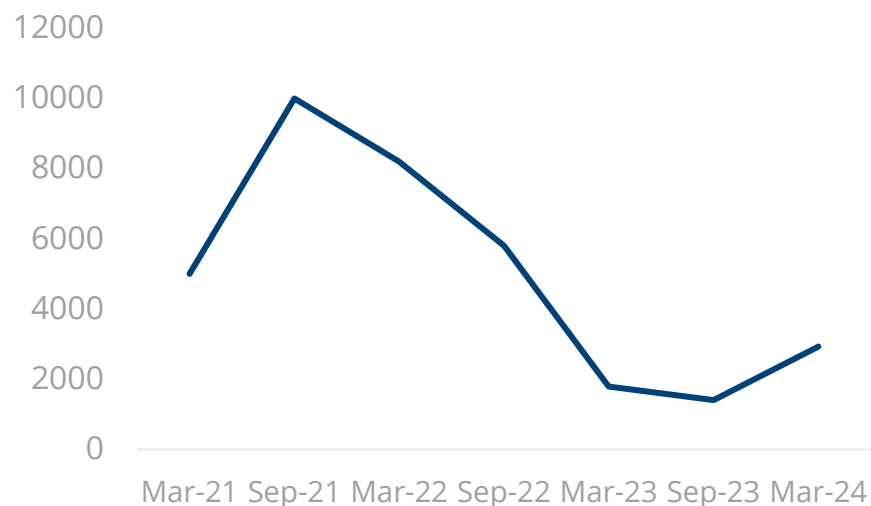
Addition of new customers across industries and adding multiple contracts across service lines

EBIT Margin Improvement

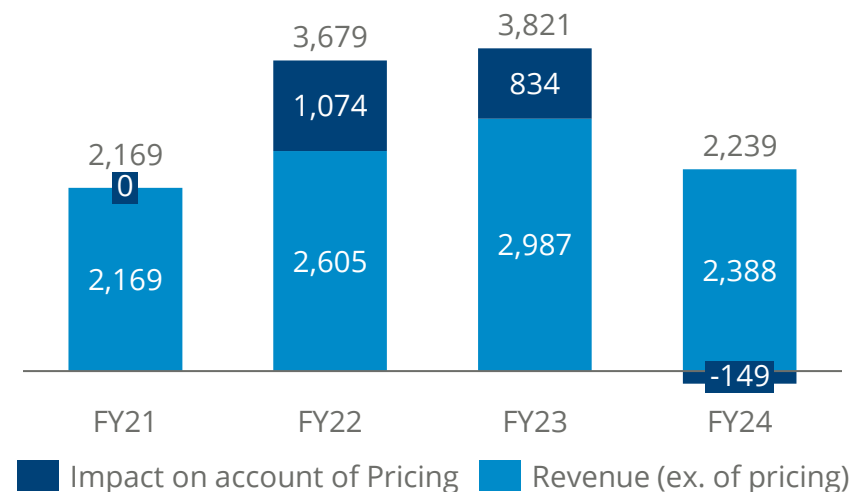
Contract level margin management coupled Operating leverage in line with medium term goals

GFS Performance

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



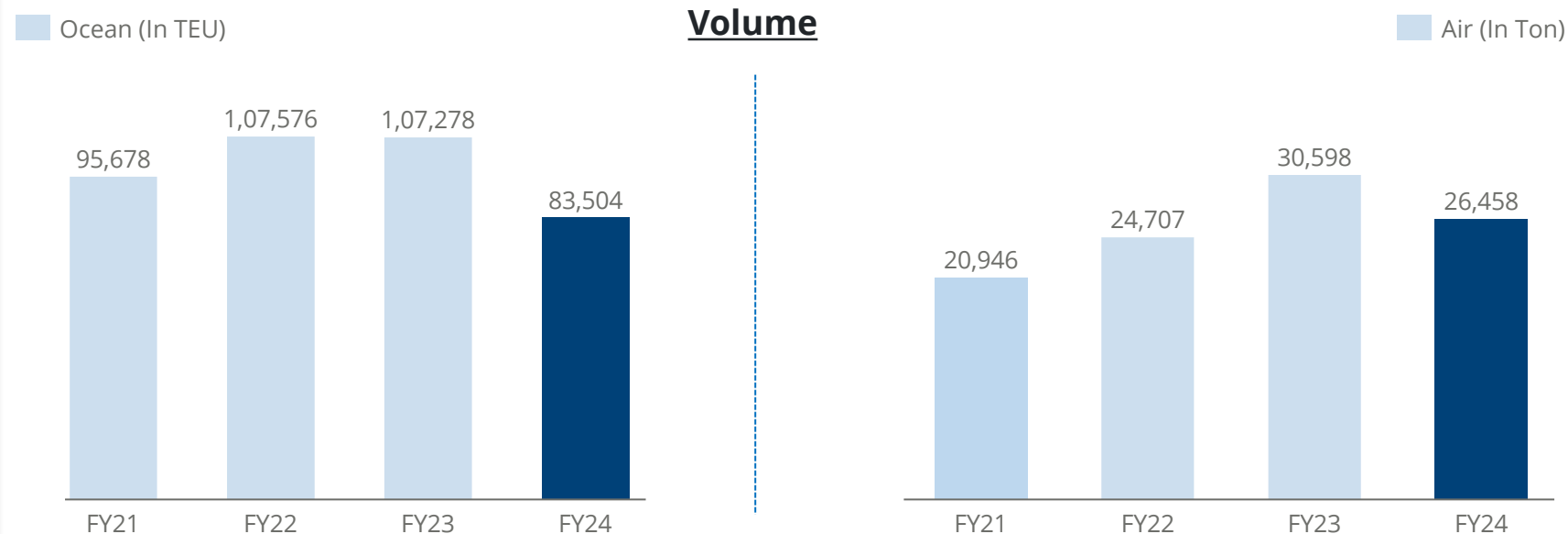
Revenue from Operations with Impact due to Pricing



Impact for FY24

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

Volume

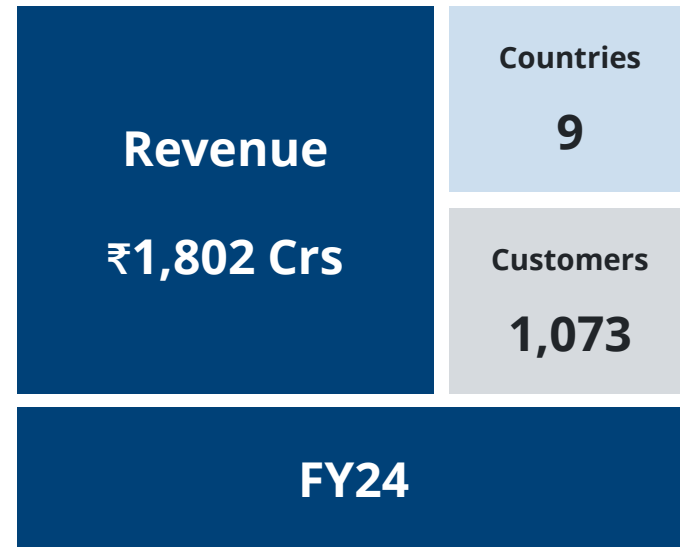


Outlook

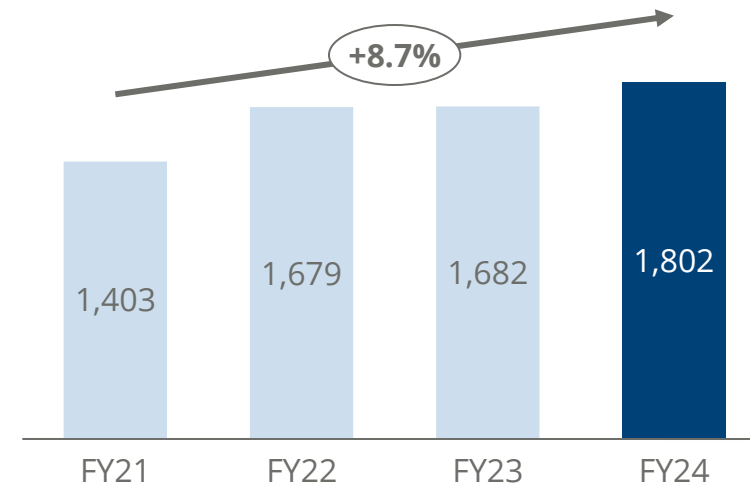
Key Initiatives to drive future growth

- 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

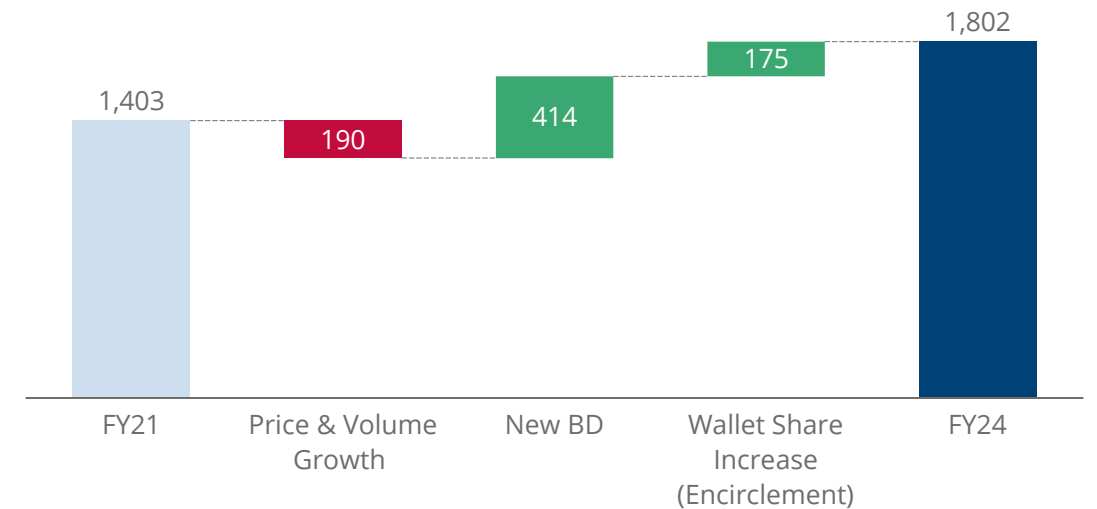
IFM Performance



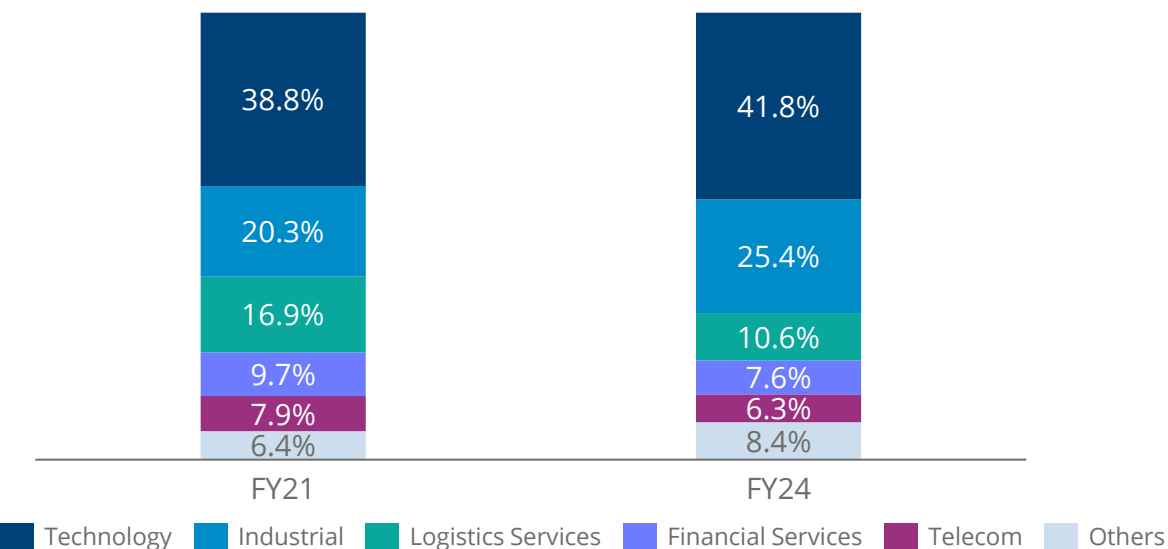
Demonstrated Growth in Revenues*



New Order Wins Continue...



Diversified across industries

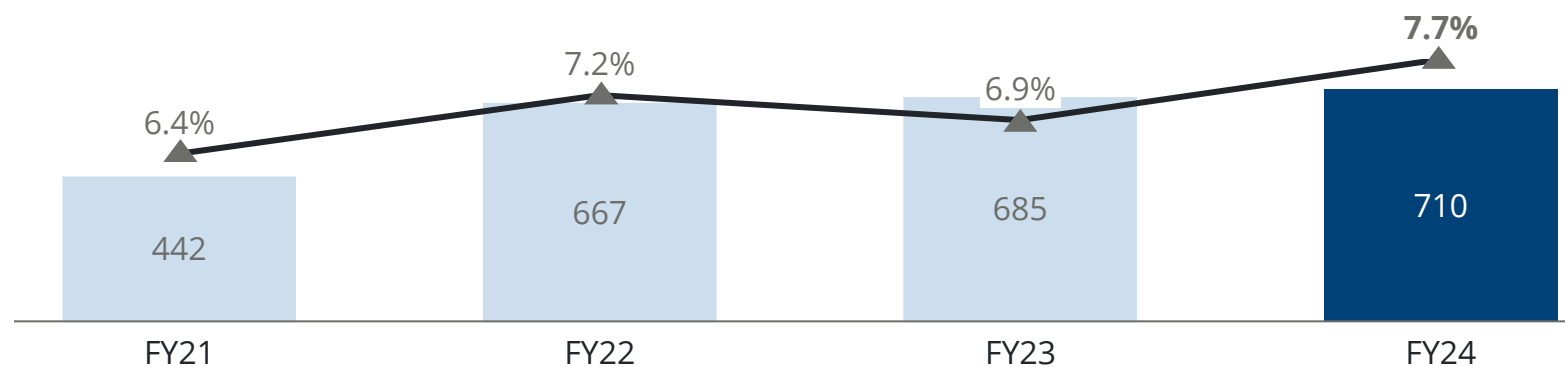


Key Highlights

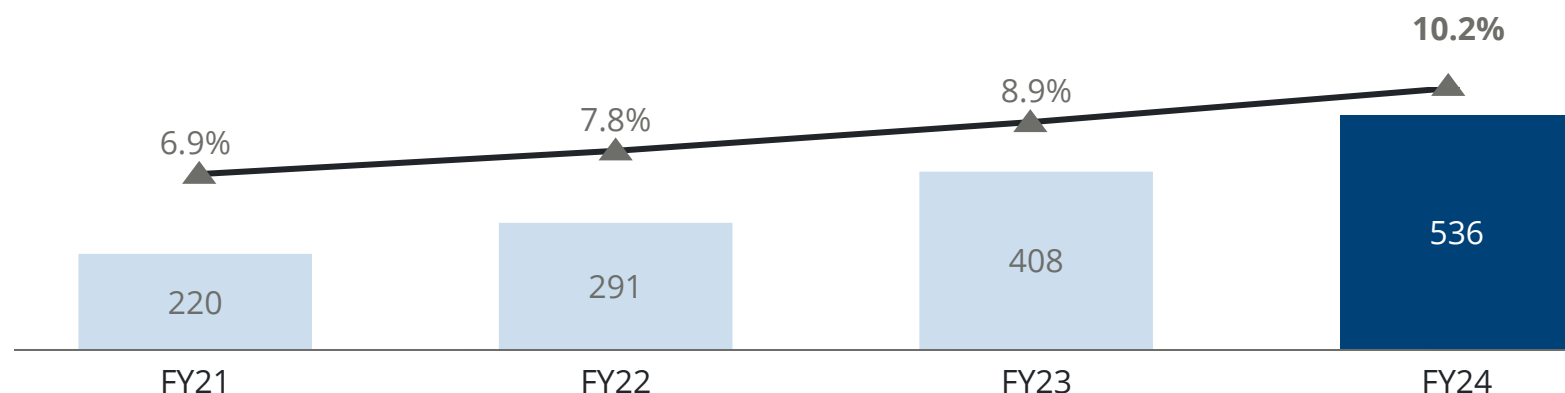
- ✓ Revenues continue to steady on account of new business development and encirclement
- ✓ End user industry demand is strong, and we expect the trend to continue
- ✓ **Outlook:** We continue to focus on our margins in IFM segment. We are implementing certain cost rationalization measures to boost our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

Positive Margin Trajectory

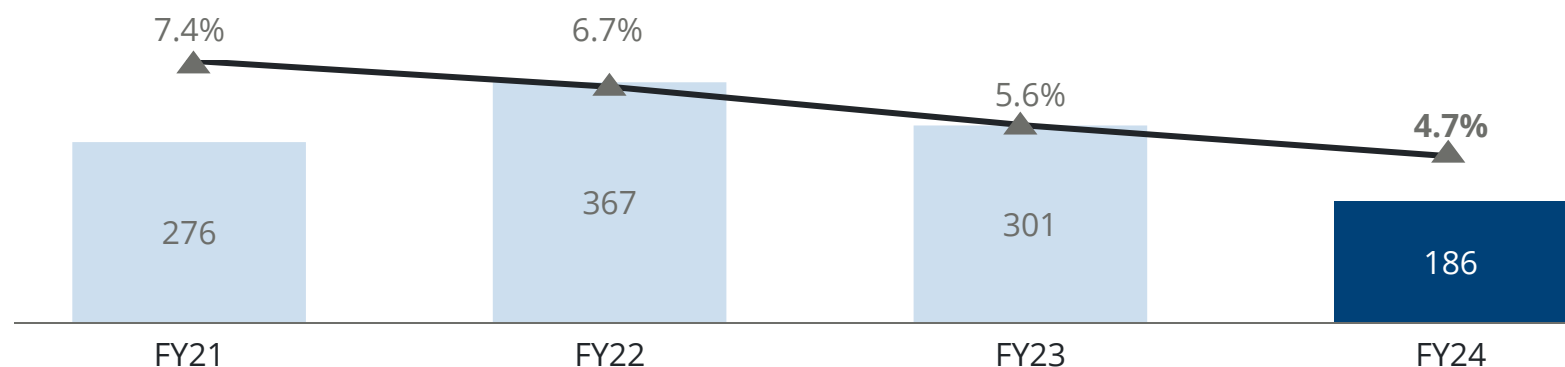
Consl. Adj. EBITDA



ISCS Adj. EBITDA



NS Adj. EBITDA



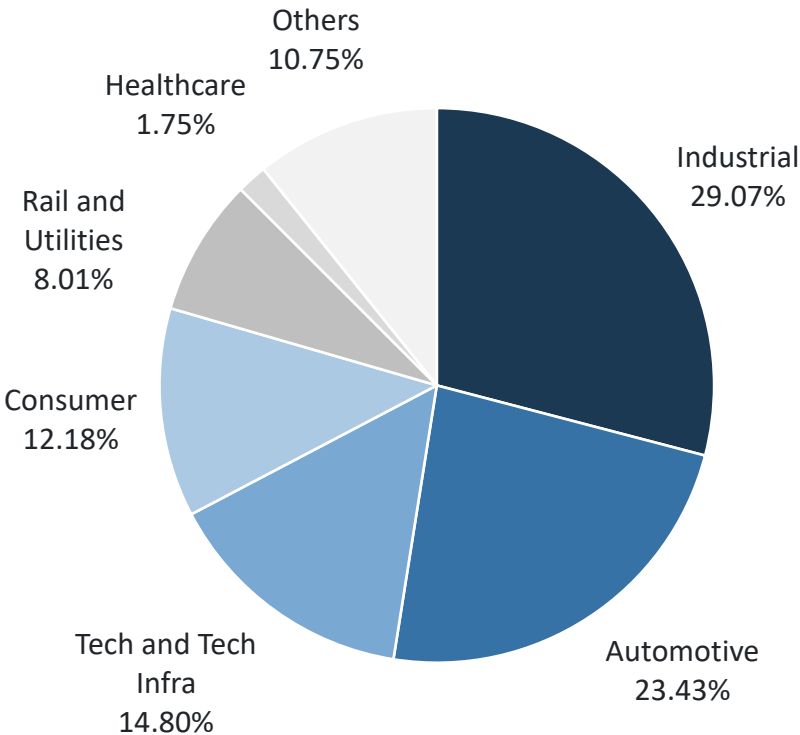
Levers of Margin Expansion

- ✓ 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

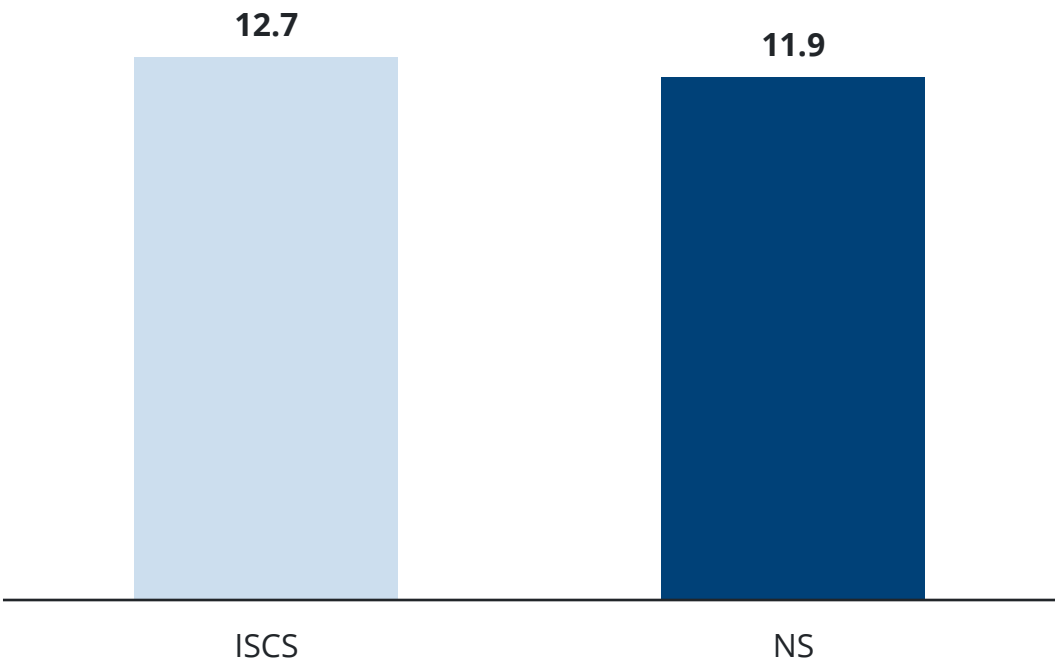
Diversified customer base

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

Select Case Studies

Case Study - Polarized Light damage detection



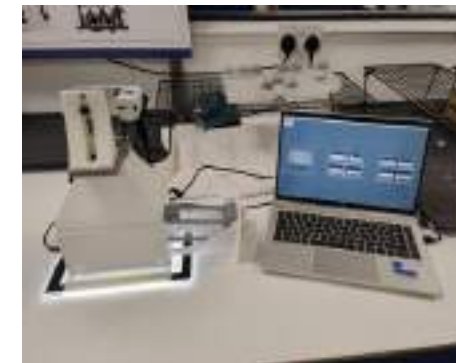
Problems

- 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**

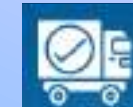


Scalable



Cost effective

Outcome



Error Free Deliveries



Time to Market

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

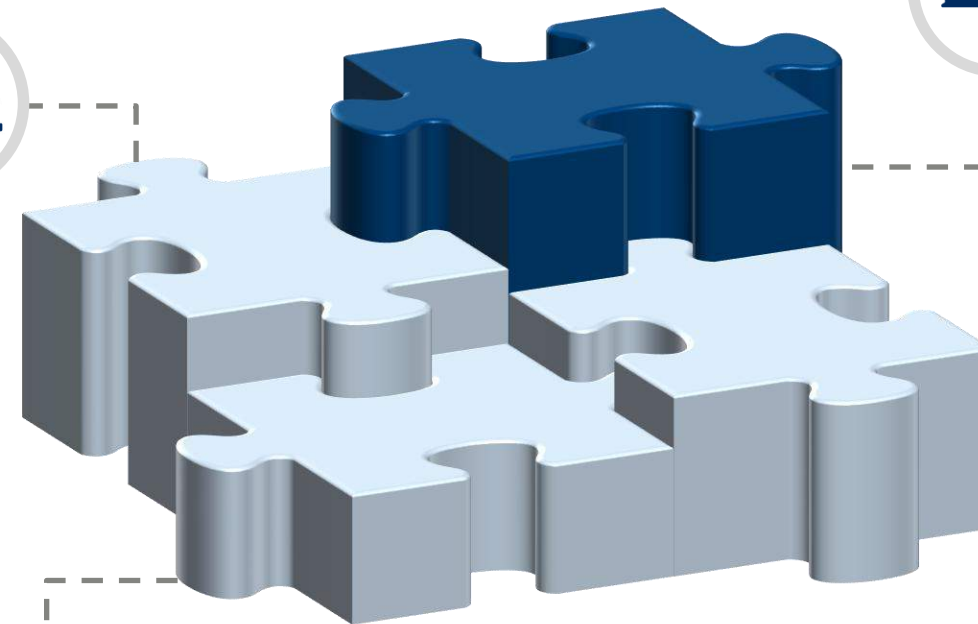
Msys

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: L63011TN2004PLC054655



Mr. J. Sivakumar - Head Investor Relations

Email: investor.relations@tvsscs.com

For updates and specific queries, please visit

www.tvsscs.com

Investor Relations: Strategic Growth Advisors Pvt. Ltd.

www.sgapl.net

CIN: U74140MH2010PTC204285

SGA Strategic Growth Advisors

Mr. Sagar Shroff / Mr. Ayush Haria

Email: sagar.shroff@sgapl.net / ayush.haria@sgapl.net

+91 98205 19303 / +91 98204 62966