



ANNUAL GENERAL MEETING, JULY 24, 2020, BENGALURU

Purpose-driven, profit-focused resilient performance

Writing the future with energy efficiency, automation, robotics & digitalization

Sanjeev Sharma, CEO & MD, ABB India Ltd.



Important notices

This presentation includes forward-looking information and statements including statements concerning the outlook for our businesses. These statements are based on current expectations, estimates and projections about the factors that may affect our future performance, including global economic conditions, and the economic conditions of the regions and industries that are major markets for ABB India Ltd. These expectations, estimates and projections are generally identifiable by statements containing words such as “expects,” “believes,” “estimates,” “targets,” “plans,” “outlook,” “on track,” “framework” or similar expressions.

There are numerous risks and uncertainties, many of which are beyond our control, that could cause our actual results to differ materially from the forward-looking information and statements made in this presentation and which could affect our ability to achieve any or all of our stated targets. The important factors that could cause such differences include, among others:

- COVID-19 crisis associated disruption risks
- business risks associated with the volatile global economic environment and political conditions
- costs associated with compliance activities
- market acceptance of new products and services
- changes in governmental regulations and currency exchange rates, and
- such other factors as may be discussed from time to time in ABB India Ltd’s filings with the Securities and Exchange Board of India (SEBI), including its Annual Report.

Although ABB India Ltd believes that its expectations reflected in any such forward-looking statement are based upon reasonable assumptions, it can give no assurance that those expectations will be achieved.

Further, Information shared herein inter-alia contains some key financials pertaining to ABB India. ABB India being a listed entity is obliged by law not to share the said information to any one (other than those who are involved in the process and who are bound by Insider Trading Regulation) unless and until the financials are considered and approved by ABB India Board and thereafter announced to stock exchanges as per the listing obligations entrusted upon ABB India. Therefore, privy to this presentation should kindly ensure strict confidentiality of the information shared and discussed herein.

Agenda

Navigating through COVID-19

2019 performance highlights

High impact projects

Sustainability is a way of life

Continuous engagement with stakeholders



First **virtual AGM** in 70 years

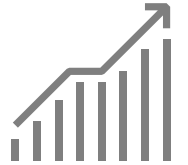
We embrace the “**new normal**”

Navigating through COVID-19

Focus areas in current scenario



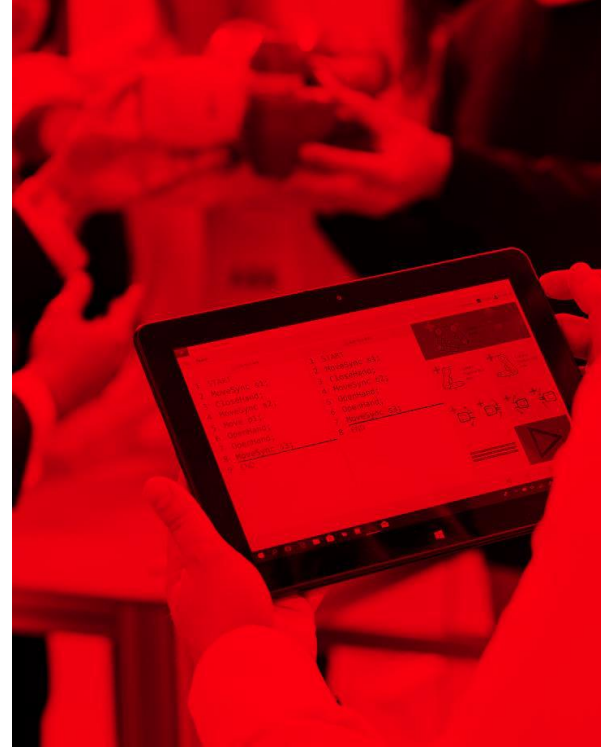
Prioritizing Health and Safety



Sustaining Business Continuity



Efficient Cash and Cost management



“New normal” is live in action

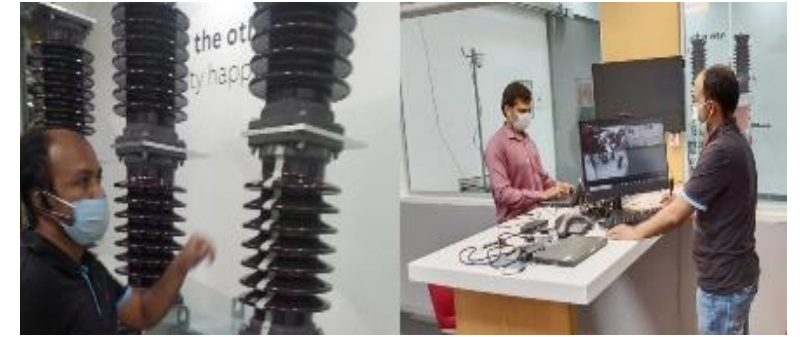
Social distancing & other COVID-19 safety protocol across ABB operations



Business continuity for customers with rapid solutions for COVID-19 wards and refineries



Remote action technology to support utilities & railways/locos



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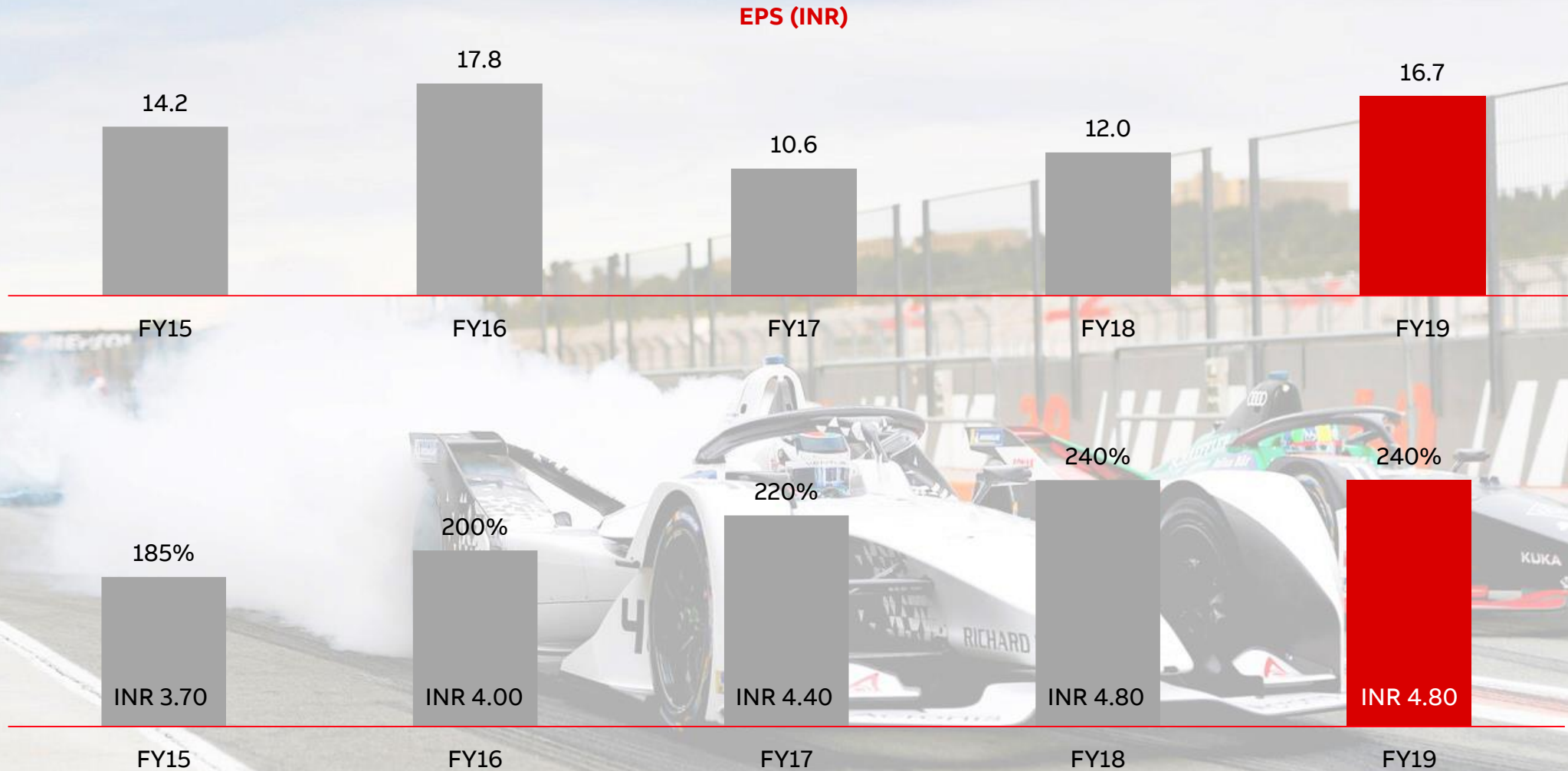
Continuous engagement with stakeholders



A photograph of two men in a server room, overlaid with a red tint. The man on the left wears glasses and a pink shirt, while the man on the right wears a white shirt. They are both looking down at a document held by the man on the right. In the background, server racks are visible. The text "We succeed by creating superior value" is centered over the image in white.

**We succeed by
creating superior
value**

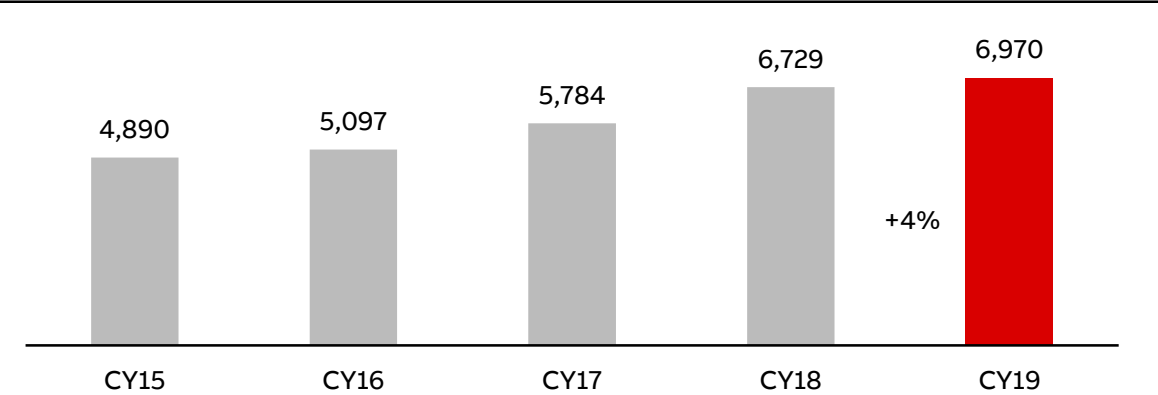
Superior shareholder value and distributing it consistently



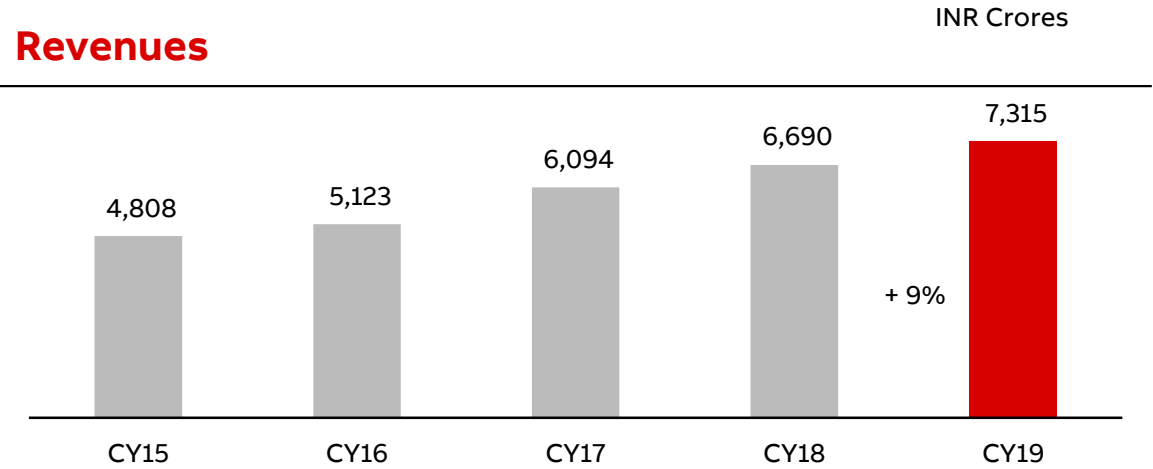
Note: FY15 and FY16 EPS includes discontinued business; FY17, FY18 and FY19 EPS is for continuing business

Strong foundation of growth

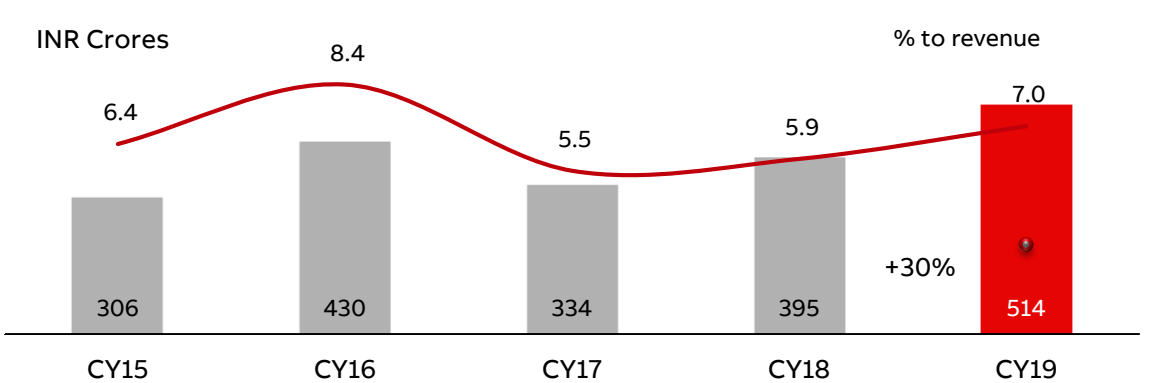
Orders



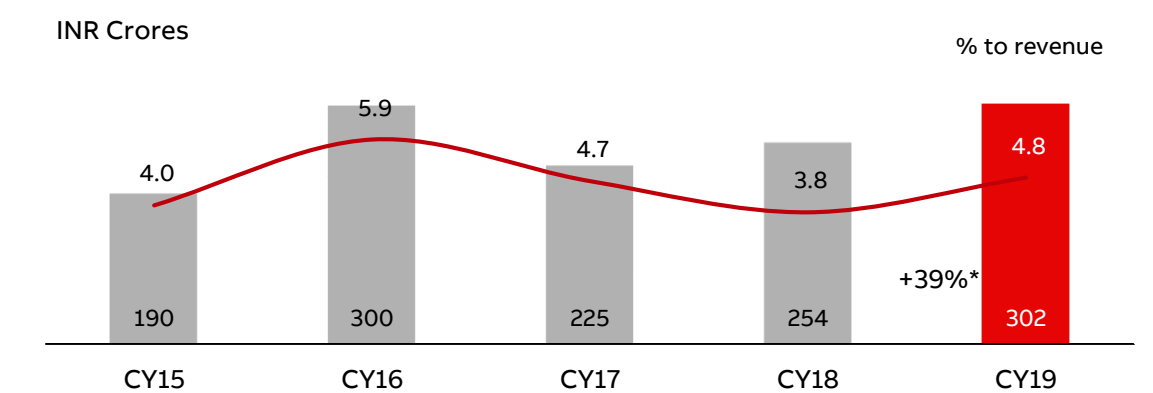
Revenues



PBT* & PBT %*



PAT & PAT %



Service and Export portfolio

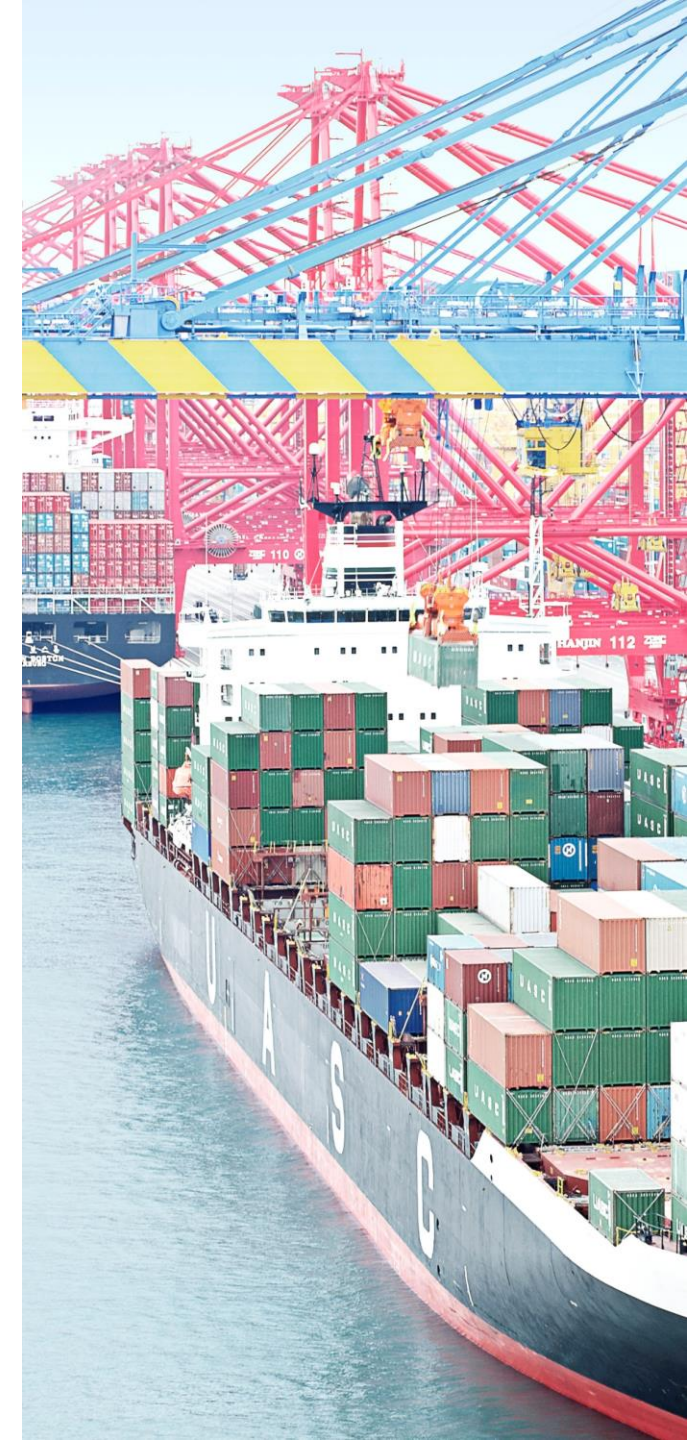
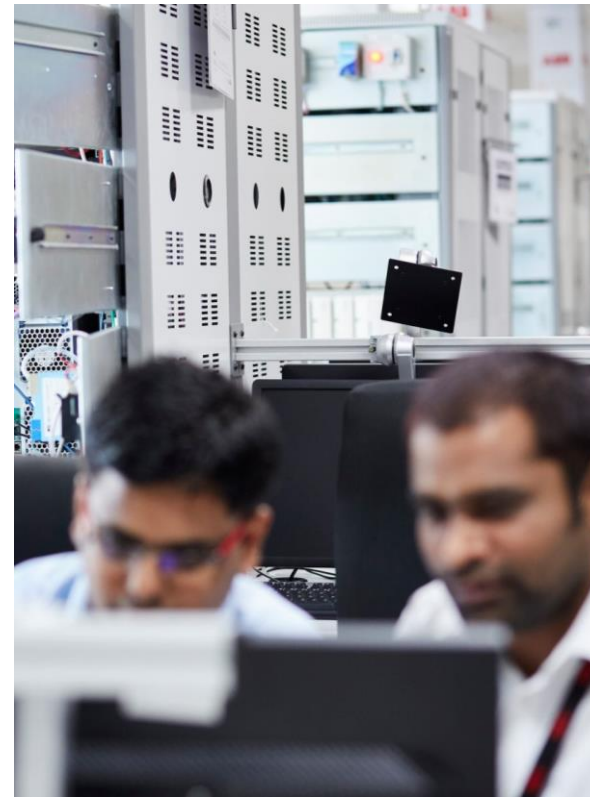
Resilient growth by expanding into global markets and leveraging strong installed base

Service

Smart factory, remote monitoring, frame agreements and life-cycle management have led to increased service revenue

Exports

Step up for RA and MO exports and success in the Indian subcontinent, Middle East and Africa



2019 Transformation projects delivered

Power Grids de-merger completed

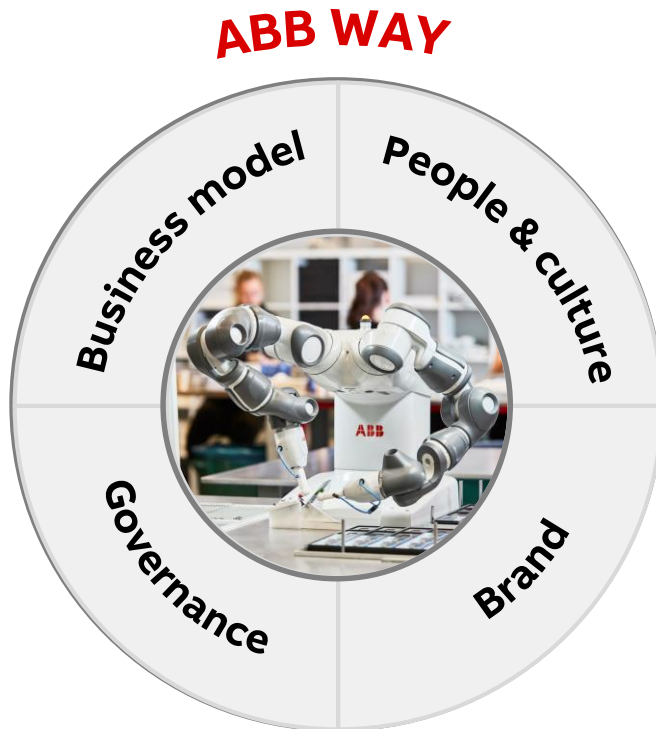
Sale of solar inverter business done

ABB Organization re-energized



The ABB Way

The glue that connects the Group



The way we operate

- Common ABB purpose, brand, values
- Standardized policies, processes and systems, including:
 - portfolio management
 - performance management
 - risk management
 - internal control & compliance
- Decentralized business model – full Division accountability

Accountability, transparency, speed

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**We push the
boundaries of
technology to drive
performance to new
levels**

ABB is built on a solid foundation to continue to...

**INVEST IN
R&D AND
LOCALIZATION**



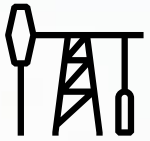
**BE A VALUE
LEADER**



**OFFER
BENEFITS OF
SCALE**



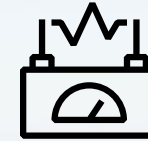
ABB is a partner in nation-building projects



60% of oil and gas produced in India monitored by ABB systems



More than **8,000** connected robots across **40** countries remotely monitored



~2,000 connected smart motion devices in Indian industry



More than **90%** of cement companies have an ABB system in operation



>300 electric locomotives of Indian Railways run on ABB's traction converters



>100,000 light points connected to **11,000** smart devices in India's largest airport



Close to **1 million** liters a day of milk production at Asia's largest dairy plant on ABB systems



65% of cars manufactured in India are painted by ABB Robots



10 out of 13 operational metros deploy ABB technology

Industry-first products and solutions launched

LV switchgear condition monitoring for increased uptime



IE4 motors and Emax2 circuit-breakers for energy efficiency & reliability



IRB 390 FlexPacker™ for accuracy in high speed & variation sorting



Intelligent engine performance software to evaluate optimization potential



Smart Cities run on ABB solutions for power distribution

Modernizing power distribution infrastructure in ancient city of Ujjain



Latest power distribution technology for smart city Ranchi – the heart of modern Jharkhand



High impact partner in nation's aspirational projects

Access to water for agriculture and better livelihoods in Kaleshwaram



Supporting unique space programs like 'Chandrayaan-2'



India's hospitality and F&B sector runs on ABB solutions

Energy optimization and reliability in leading hospitality chains



Hygienic and hands-free handling of food packages

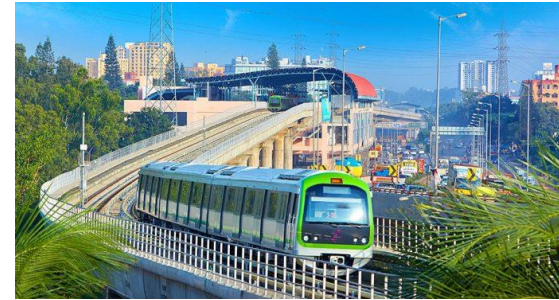


India's transportation sector technology partner

Traction solutions for Indian Railways made in India



Modular power distribution equipment for metros



LV/MV equipment for Mangaluru and Goa airports



Customer engagements with digital propositions in 2018-19



150

**Innovation
workshops**

05

**Big bang events at
Ability Innovation Center**

~10000

**Customer
interactions**

35

**Proof of concepts/
Orders**

ABB's domain knowledge with ABB Ability™ for superior customer value

Miniature to digital circuit-breakers



MCBs

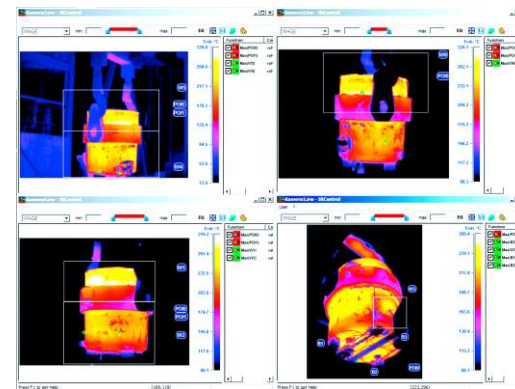
Emax2



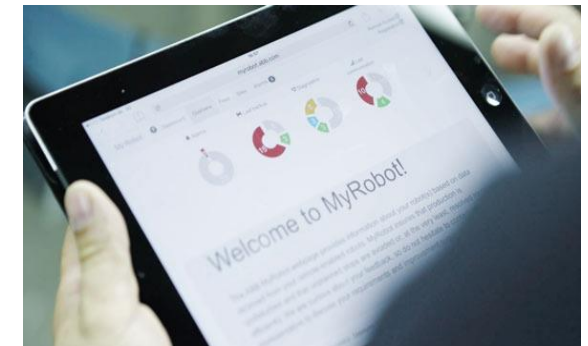
~2000 connected motors and drives



Dodge CST to ladle tracking software for steel makers



Connected robot services



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A woman with long brown hair, wearing a white lab coat, is shown from the chest up. She is holding a thin plant stem with small green leaves. The background is a blurred outdoor scene with a building and trees. The entire image is overlaid with a semi-transparent red filter. Large white text is centered over the image.

**We energize the
transformation of
society and industry to
achieve a more
productive,
sustainable future**

Embedding **sustainability** in everything we do, every day



16 projects across the country touching over **100,000** lives with **10** Sustainable Development Goals (SDGs) directly addressed

- Access to healthcare in remote areas with Mobile Health Units
- Special projects and evening programs for children in Nelamangala to enhance education & skill development
- Stimulation, exploration and hydrotherapy for the differently-abled
- Scholarships and skill development program for girl students

Achieving 100% compliance on CSR spend consistently over the last 4 years



Combining economic success with environmental stewardship & social progress



Safety - 98.1%

of hazards resolved
Don't look the other way



Health & wellbeing - 88.4%

employees participated in Global Health Challenge. Employee Engagement Program was also launched in the year



Society – 1 Lakh

lives impacted through 16 community projects in 2019



Waste - ~90%

of all wastes generated were recycled in 2019



Green power - 26%

of total energy is sourced from green power in 2019



Water - 8.4%

reduction in consumption since the last year



Suppliers - 25

in-depth supplier sustainability assessments in 2019

Creating sustainable value for all stakeholders

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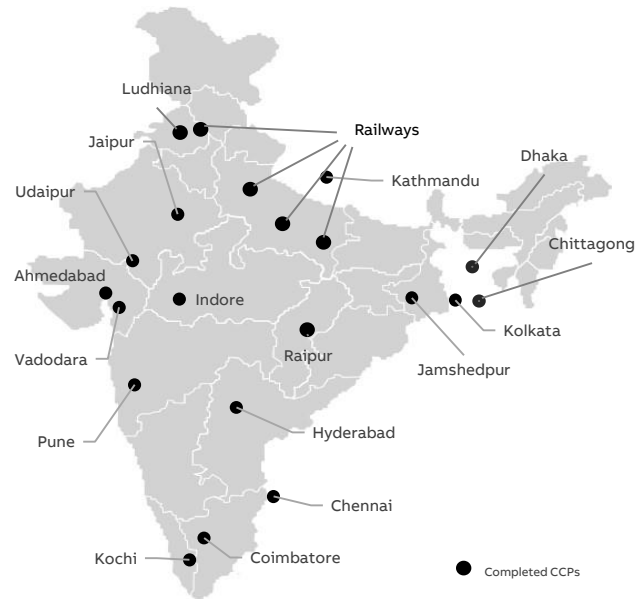
Continuous engagement with stakeholders



Physical to Digital Customer Engagement

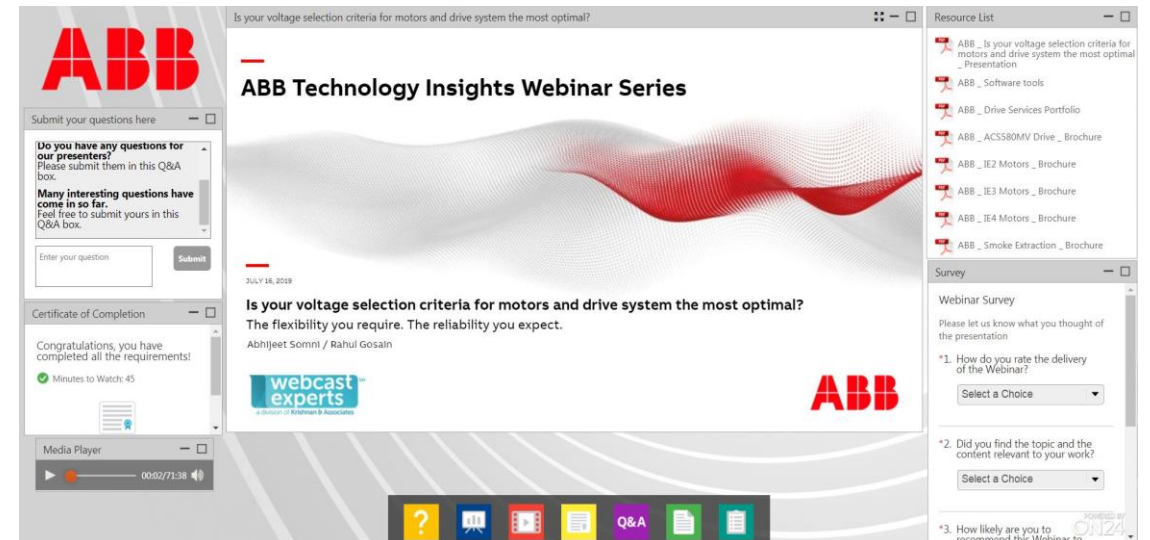
Adapting to the New Normal

Customer Connect Program (CCP)



22+ Customer Connect Events
Over 25k+ Customers Connected

Digital Engagement



4 Pilot Webinars driven at Country Level
200+ Business led Webinars connecting **15k+ Customers**

Continuous engagement with stakeholders

Policymakers, thinktanks, industry associations, educational institutes – global and local



 **Piyush Goyal** @PiyushGoyal
Met Peter Voser, Chairman of the Board & CEO of ABB at World Economic Forum

Discussed our plan of Railway electrification & the huge investment opportunity it presents. Also, spoke about a range of emerging sectors in India like e-mobility, automation & renewable energy. #wef20



ABB India @ABBIndia
Congratulations to @fluturads @ecolibriume & @numocity for winning the honorable @Synerleap memberships at #ABB India startup pitching fest Dragons' Den in Bengaluru. Let's write the digital future, together. #ABBStartupCollaboration



Diversity Matters

50% increase in diversity over last 2.5 years

**AVATAR Award for 100
best places for women
to work**



**Leadership Development
Program for high potential
women - RISE**



**SheMaker Evangelist
Award by
PeopleConnect**



Media spotlight for ABB's achievements

'ABB helped firms become agile'

Advantage of skilled labour has been a key factor in the success of many Indian companies. Many businesses are ready to adopt new technologies, but they are not agile enough to do so. ABB has helped them become agile by providing them with the right tools and expertise.

PIVOT OR PERISH

Many of our customers, especially in the chemical sector, have been forced to pivot or perish. ABB has helped them to pivot by providing them with the right tools and expertise.



E-cars will power homes, offices

Sanjeev Sharma, MD, ABB India

ABB India is not just a company that manufactures electric vehicles. It is a company that is helping to power homes and offices with electric vehicles. This is a major achievement for ABB India.



Interrupting the unconscious bias: Interview with Raman Kumar Singh, CHRO, ABB India

Chiranjeevi

In this interview with Raman Kumar Singh, CHRO, ABB India, we discuss the importance of interrupting unconscious bias in the workplace. We also discuss the challenges of diversity and inclusion in the Indian workplace.



'We'll Push for Localisation to Reduce Dependence on Dollar'

Sanjeev Sharma, Managing Director, ABB India

ABB India is committed to localisation and reducing its dependence on the dollar. This is a major achievement for ABB India.



Brick & Mortar's Digital Leap

Tracking Industry 4.0

Old Economy Inc is using IoT and AI to expand its digital presence, taking on technology majors as well as diversified companies, write Racita Prasad & Jochelle Mendonca



"You must nurture talent over a period of time, it's not instant coffee"

Sanjeev Sharma, MD, ABB India

Sanjeev Sharma, MD, ABB India, shares his insights on nurturing talent over a period of time. He emphasizes the importance of long-term investment in human capital.



People matters

Sanjeev Sharma, MD, ABB India

Sanjeev Sharma, MD, ABB India, discusses the importance of people in the workplace. He emphasizes the need for a strong culture and effective leadership.



Niti Ayog, ABB organise workshop on AI for MSMEs

PTI | March 26, 2019 | Updated 18:32 IST

Niti Ayog and ABB India have organized a workshop on AI for MSMEs. The workshop aims to help MSMEs leverage AI technology to improve their productivity and competitiveness.



ABB remains bullish to further Gujarat's industrial growth

ABB India is committed to furthering Gujarat's industrial growth. This is a major achievement for ABB India.



ABB wins ₹270-crore order for train technologies from Indian Railways

ABB India has won a ₹270-crore order for train technologies from Indian Railways. This is a major achievement for ABB India.



ABB's global business rejig will benefit


Sanjeev Sharma, MD, ABB India

Sanjeev Sharma, MD, ABB India, discusses the benefits of ABB's global business rejig. He emphasizes the importance of a strong global presence for ABB India.



Deputy CM Delhi @msisodia & Sanjeev Arora, President, Motion Business, ABB India inaugurated @akshayapatra's 51st #middaymeals kitchen.

Deputy CM Delhi @msisodia & Sanjeev Arora, President, Motion Business, ABB India, have inaugurated @akshayapatra's 51st #middaymeals kitchen. This is a major achievement for ABB India.



Business Today

Sanjeev Sharma, MD, ABB India

Sanjeev Sharma, MD, ABB India, discusses the importance of business today. He emphasizes the need for a strong business strategy and effective leadership.



Core industries in India are looking to go digital, and ABB is helping them get there

ABB India is committed to helping core industries in India go digital. This is a major achievement for ABB India.



Sanjeev Sharma

Managing Director, ABB India & ABB India

Sanjeev Sharma, Managing Director, ABB India & ABB India, discusses his achievements and the future of ABB India.



A photograph of two men in a server room. The man on the left is wearing glasses and a light blue shirt, looking at a document. The man on the right is wearing a white shirt and a lanyard, looking down. The background is filled with server racks and a red glow.

**We succeed by
creating superior
value**

An abstract image featuring vibrant, glowing lines in shades of blue, green, and yellow against a dark background, suggesting a digital or technological theme.

**We push the
boundaries of
technology to drive
performance to
new levels**

A photograph of a woman in a light blue shirt standing in a field, looking up and to the right. The background is a bright, hazy landscape with some foliage.

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transformation of
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sustainable future**

OUR PURPOSE

ABB