



Corporate Presentation

September, 2018



Group Snapshot

7 Decades

13 Entities in
8 States

28
Manufacturing
Facilities

3 R&D Centres in India
1 R&D and
Testing Center
1 Design Center in
Taiwan

Leader in
**Automotive Lighting
& Gear Shifters**

Over **9000**
employees



FOUNDED
1945

Group Consists of Two Listed Companies

Lumax Industries Limited

Lumax Auto Technologies Limited

The D K Jain group has Auto Component manufacturing capabilities across several product categories including end-to-end Automotive Lighting solutions, Air Intake systems, Integrated Plastic Modules, Gear Shifters, Seat structures & mechanisms, 2-Wheeler Chassis, LED Lighting, Electric & Electronic Components etc.



**Market leader in Automotive Lighting
& Gear Shifters**

PARTNERSHIPS

with several leading global Auto players- Stanley, Japan; SL Corporation, Korea; Cornaglia, Italy, Mannoh, Japan; Gill-Austem, USA-Korea; Ituran, Israel; FAE, Spain; Alpine

13 Entities in **8** States

28 manufacturing facilities

3 R&D Centres in India

1 R&D Center and Testing Facility

1 overseas Design Centers

>9000 Employees

While **Lumax Industries** is focused on Auto Lighting, **Lumax Auto Technologies** is the group vehicle for other components, after market and new growth areas

Engaged in manufacturing of end-to-end Automotive Lighting Solutions

Having 2 GOI certified R&D centres and 1 Design centre in Taiwan
Employee strength – 4800+

Technical & Financial collaboration with Stanley Electric, Japan over 3 Decades

Listed on NSE and BSE in 1984



Products & Services

End to end Automotive Lighting Solutions

Partnerships

- Stanley Electric, Japan
- SL Corporation Korea

Incorporated in 1981; Operates 13 plants across India and one GOI certified R&D facility at Manesar, One R&D and Testing Center at Pune, having >1500 employees

Present in Lighting (2/3 wheelers), Air Intake system, Integrated Plastic Modules, Gear Shifters, Seat Structures & Mechanisms, 2Wh Chassis, LED Lighting. Electric & Electronic Components, Telematics Products & Services, Oxygen Sensors etc.

Listed on NSE and BSE in 2007-08



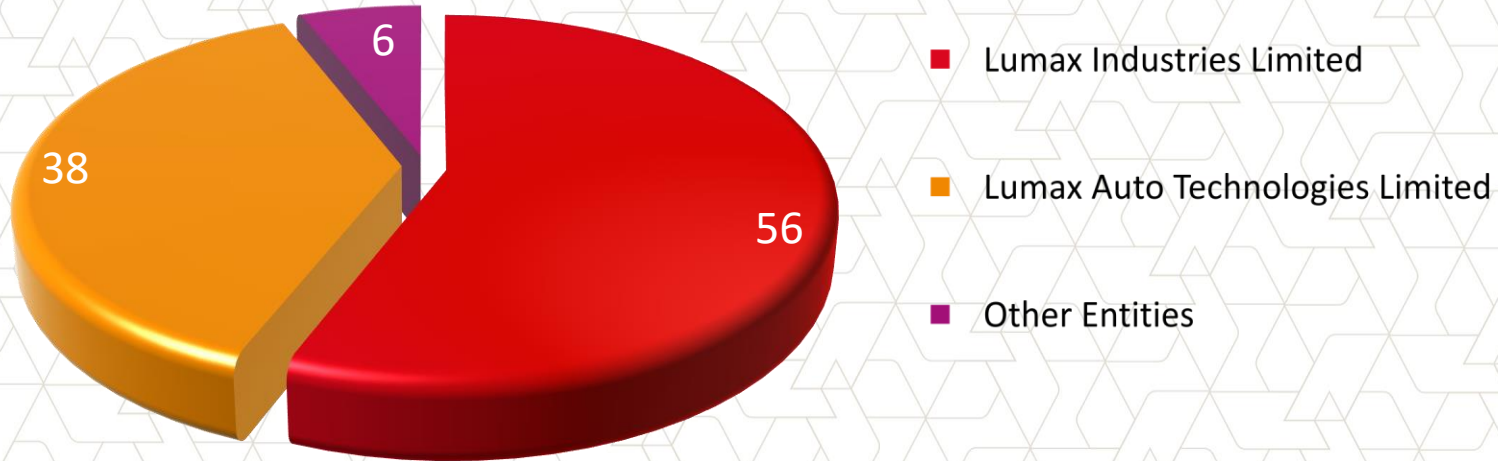
Products & Services

Intake Systems, Integrated Plastic modules, 2-wheeler Chassis & Lighting, Gear Shifters, Seat Structures & Mechanisms, LED Lighting, Aftermarket, Electrical & Electronics components, Telematics Products & Services, Oxygen Sensors

Partnerships

- Cornaglia SPA - Italy
- Mannoh Industrial Co. Limited – Japan
- Gill Industries Inc. – USA
- Austem Co. Limited – Korea
- Alpine – Japan
- Ituran – Israel
- FAE - Spain

Group Revenue Break Up (%) FY 17-18 Revenue of Rs. 2,950 Cr





Group Purpose, Vision & Values



Group Purpose

We deliver pride and progress with positivity



VISION

Building an admired high performance global organisation in whom all stakeholders have absolute trust



VALUES

Respect | Integrity | Passion | Excellence



Milestones



1945: Founded a partnership firm 'Globe Auto Industries' as a Trading concern

1956-57: Set-up dedicated unit for Automotive Lighting Equipment in Delhi

1977-79: Setup manufacturing units in Faridabad, Haryana and Pune, Maharashtra



1981: Lumax Industries Pvt Limited established after taking over partnership firm Globe Auto Industries

Lumax Auto Electricals was established to manufacture 2-wheeler Lighting at Bhosari, Maharashtra

1984: TA signed with Stanley, Japan for Lighting Equipment

1985: Setup a manufacturing unit in Gurugram, Haryana. The company went public & is listed on the stock exchange

1988: Name of the company was changed to Lumax Industries Limited



1991-2000

1994: Equity participation of Stanley, Japan in Lumax Industries Limited

Manufacturing unit setup in Aurangabad, Maharashtra

1997: A Unit was setup in Waluj, Maharashtra to manufacture Chassis

Joint Venture agreement with SL Lumax Limited.
Further Equity participation by Stanley, Japan

1998: Set-up manufacturing unit at Dharuhera, Haryana

2000: The company was selected as cluster member for TPM activities by Bajaj Auto



2001-06

2002: Setup the Plant at Chakan, Maharashtra to manufacture 2-wheeler Lighting

2003: Demerger Lumax Industries

2005: Setup manufacturing unit in Chakan, Maharashtra

2006: Lumax DK Auto Industries Limited became a 100% subsidiary

Name of the company was changed to Lumax Auto Technologies Limited



2007: Further Equity participation by Stanley, Japan

Setup Seat frame manufacturing plant in PCNTDA, Bhosari, Maharashtra.

JV company with Cornaglia, Italy started as Lumax Cornaglia Auto Technologies Pvt Limited.

Lumax Auto Technologies Limited listed on Stock exchange

2008: Setup manufacturing plant in Pantnagar, Uttarakhand & expansion of Dharuhera and Chakan plants. Also setup a R&D centre at Gurugram

2009: Entered a TA with Mannoh Industrial Company, Japan for manufacturing of Gear Shift Lever

2010: Setup a unit at Kala- Amb, HP to manufacture diversified auto components for After Market

Setup a manufacturing plant in Haridwar, Uttarakhand

2011: Setup manufacturing plants in Bawal, Haryana; Sanand, Gujarat & Bidadi, Karnataka. Also setup a R&D centre at Pune

Setup state-of-the-art Electronics Manufacturing facility in Manesar, Haryana



2012: Setup the first Robotic Motorcycle Chassis plant in Waluj, Maharashtra.

Pantnagar plant received TPM excellence award from JIPM

2013: Setup a plant at Narsapur, Karnataka to manufacture Moulded parts

Formed JV with Gill Austem LLC, USA to manufacture Seat frames & Mechanism

2014: JV company with Mannoh Industrial Company, Japan started as Lumax Mannoh Allied Technologies Limited

The Company completed 25 years of listing on BSE

2015: Setup another Robotic Motorcycle Chassis plant in Waluj, Maharashtra

Formed JV with Sipal, Italy for Aerospace & Defence Engineering services

The Company received the TPM award from JIPM

2016: Pantnagar plant received TPM consistency award from JIPM

Opening of Design Centre in Taiwan



2017: Chakan plant received TPM excellence award from JIPM

Formed a JV with Ituran Location and Control Limited, Israel to provide Telematics Products and Services

Formed a JV with FAE, Spain to manufacture Oxygen Sensors

Set up a Assembly facility in Mehsana, Gujarat under LMAT

Further expansion of Lumax Industries Limited, Sanand, Gujarat facility

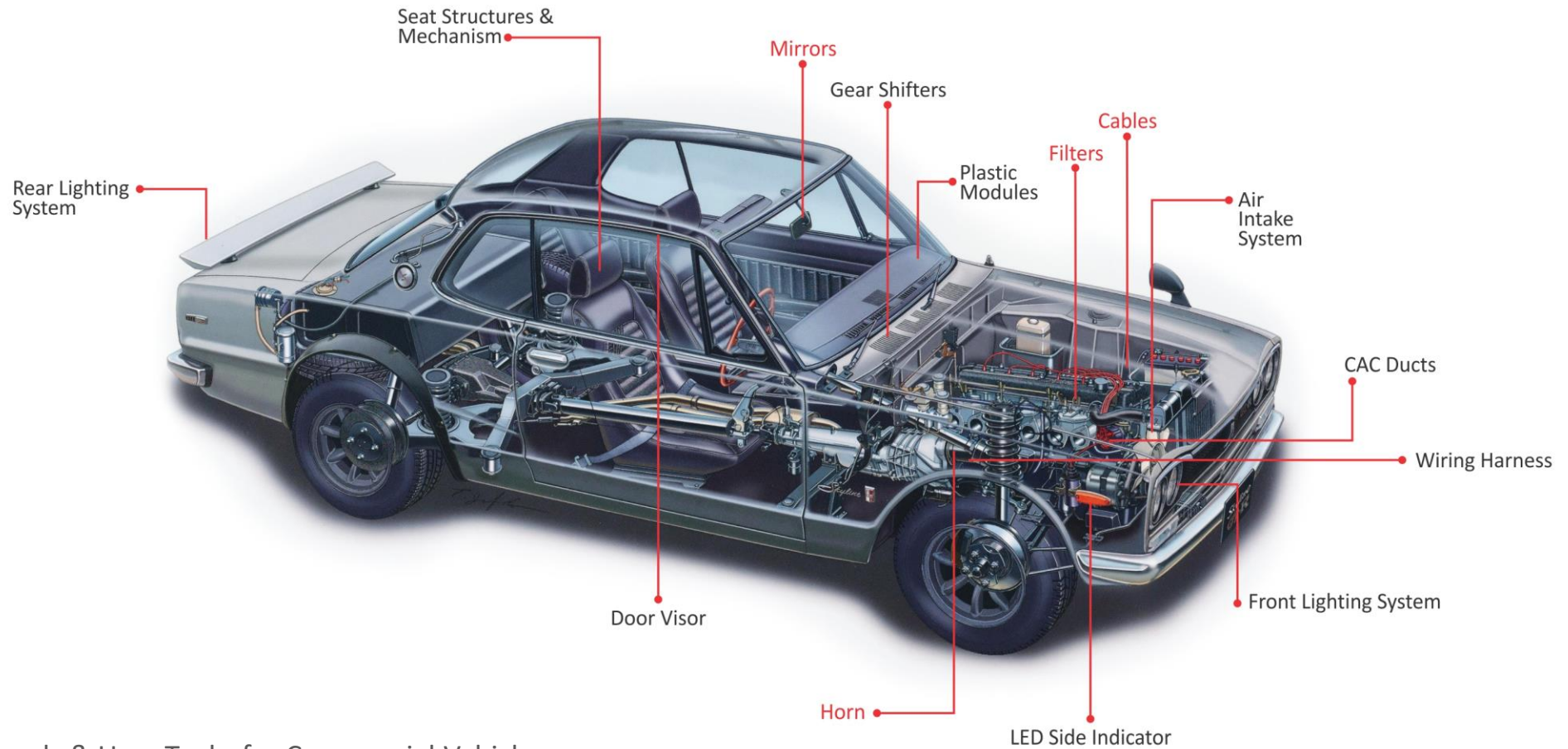


2018: Bawal plant received the JIPM - TPM Excellence Award in Category A



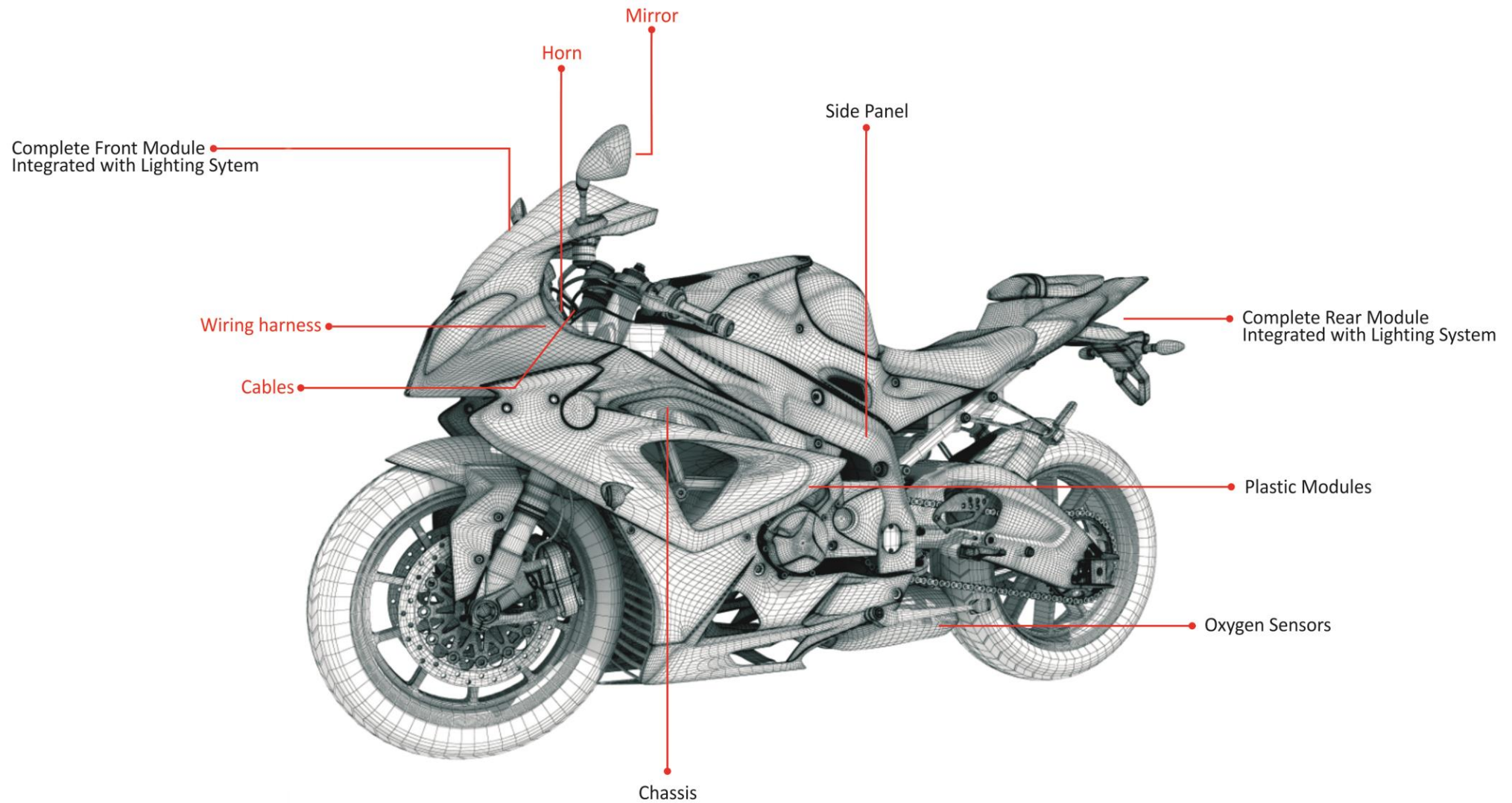
Diversified Product Range

Diversified Product Range – 4 Wheelers & CV



- Destination Boards & Urea Tanks for Commercial Vehicle
- Telematics Products & Services
- *Aftermarket products*

Diversified Product Range – 2 Wheelers





**Fostering Partnership to
Deliver Excellence**



Partnerships



JAPAN

JV FOR LIGHTING

Relationship Since 1984
37.5% in Lumax Industries
Limited



KOREA

JV FOR LIGHTING AND
OTHER AUTOMOTIVE PARTS

Relationship Since 1997
78.72% in SL Lumax
Limited



ITALY

JV FOR EMISSION
SYSTEMS

Relationship Since 2007
50% in Lumax Cornaglia Auto
Technologies Pvt Limited



JAPAN

JV FOR GEAR SHIFTERS

Relationship Since 2008
45% in Lumax Mannoh
Allied Technologies Limited



JV FOR SEAT FRAMES, STRUCTURES,
AND MECHANISMS

Relationship since 2013
50% in Lumax Gill-Austem
Auto Technologies Pvt Limited



ITALY

JV FOR INTEGRATED LOGISTIC
SUPPORT ENGINEERING

Relationship Since 2015
45% in SIPAL Engineering
Private Limited

Partnerships



JAPAN

EXCLUSIVE DISTRIBUTORSHIP
AGREEMENT

Relationship since 2014



ISRAEL

JV FOR SALE OF TELEMATICS
PRODUCTS AND SERVICES

Relationship since 2017
50% in Lumax Ituran
Telematics Pvt. Ltd.



SPAIN

JV FOR
OXYGEN SENSORS

Relationship since 2017
49% in Lumax FAE Technologies
Pvt. Ltd.



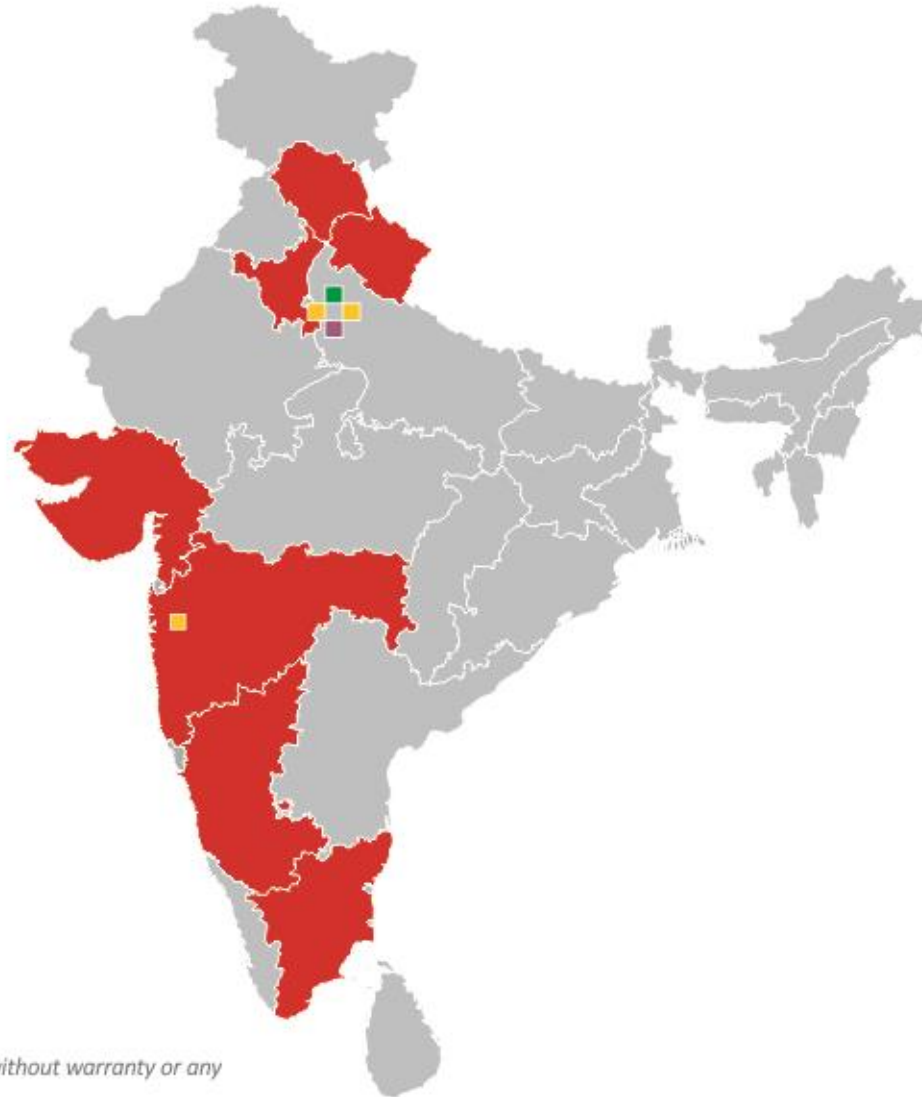
Our Presence

27 Locations close to customers

28 Plants in 8 States

Lumax Industries Limited &
Lumax Auto Technologies Limited,
along with its subsidiaries,
JVs & Associates

National		
	Facilities	Location
	R&D & Engg Centre	Gurugram, Manesar, Pune, Bangaluru
	Corporate HQ	Gurugram
	After Market Division	Gurugram
International		
	Design Centre	Taiwan



State	Mfg Locations	#
Haryana	Bawal	1
	Dharuhera	1
	Gurugram	2
	Manesar	3
Maharashtra	Pune	9
	Waluj	2
Karnataka	Bengaluru	2
Gujarat	Sanand	2
Tamil Nadu	Sriperumbudur	1
Uttarakhand	Haridwar	1
	Pantnagar	3
Himachal Pradesh	Kala Amb	1
Total		28

Map not to scale. All data, information and maps are provided "as is" without warranty or any representation of accuracy, timeliness or completeness.



Enhanced 360° Customer View





Relationship with Diversified Customers

Two Wheeler



Four Wheeler



Commercial Vehicle



TIER 1



Tractor/FES



Export



Defence & Aerospace



Strong Aftermarket Presence



State of the art Manufacturing Facilities



Manufacturing Facilities



Lumax Industries - Chakan
End-to-end Automotive Lighting Solutions



Lumax Mannoh Allied Technologies - Manesar
Gear Shifters

Manufacturing Facilities



Lumax Industries – Haridwar
End-to-end Automotive Lighting Solutions



Lumax Industries - Gurgaon
End-to-end Automotive Lighting Solutions

Manufacturing Facilities



Lumax Industries – Bawal (End-to-end Automotive Lighting Solutions)



Lumax Auto Technologies – Bengaluru (Integrated Plastic Modules)

Manufacturing Facilities



Lumax Industries – Sanand
End-to-end Automotive Lighting Solutions



Lumax DK – Pantnagar
Automotive Lighting & Integrated Plastic Modules

Manufacturing Facilities



Lumax Industries – Dharuhera
End-to-end Automotive Lighting Solutions



Lumax Industries – Pantnagar
End-to-end Automotive Lighting Solutions

Manufacturing Facilities



Lumax Auto Technologies – Chakan
2- Wheeler Lighting



Lumax Gill-Austem Technologies– Bhosari
Seat Structures

Manufacturing Facilities



Lumax DK Auto – Manesar
Integrated Plastic Modules



Lumax Industries – Bengaluru
End-to-end Automotive Lighting Solutions



Lumax Cornaglia Auto Technologies
Intake Systems, CAC Ducts, Urea Tank



In-House R&D, Validation Facility & Design Studio

In-House R&D & Validation Facility





Awards & Recognitions

Awards & Recognitions



JIPM – TPM Excellence Award – Category A won by Lumax Industries Limited – Bawal Plant

Awards & Recognitions



JIPM-TPM EXCELLENCE AWARD by LATL, Chakan plant

Awards & Recognitions



Lumax Industries awarded by Maruti Suzuki India for Tier – 2 Upgradation, Gujarat Localization and Overall Performance in May, 2018.

Awards & Recognitions



Award received for quality improvements from Maruti Suzuki in May 2017

Awards & Recognitions



Lumax Mannoh Allied Technologies awarded for Overall Performance by Maruti Suzuki India in May, 2018

Awards & Recognitions



Award – Lumax Mannoh awarded for efforts made for VA-VE from Maruti Suzuki in May, 2017



Lumax Industries awarded for New Part Development by Honda Motorcycle & Scooter India in February, 2018



Overseas Supplier Association - 'Special Recognition Award' from Toyota Motor Corporation, award being given by Mr. Takeshi Uchiyamada, Chairman, Toyota Motor Corporation

New Plant Inauguration in Gujarat



Gujarat Plant of Lumax Industries was Inaugurated in November, 2017

New Design Center in Taiwan



Design Centre in Taiwan established in 2016



CSR Initiatives



EDUCATION

- Integrating Girl Child to schools - over 1500 girls in years
- Transforming youth through Career Counselling - **2600+**

CSR

Lumax Charitable Foundation, the wing of Lumax, has been working schools in Gurgaon catering to the needs of the low-income groups communities. The foundation has envisioned to upgrade and improve quality of Education and Infrastructure at schools so as to provide holistic education. In the area of health, foundation has several programmes namely, Cataract surgeries, Cancer awareness, screening and treatment, health check-up at schools.

EDUCATION



HEALTHCARE



- Conducted Cataract surgeries providing vision to **1300+** number out of **15000+** screenings in two years
- Working towards a 'Cancer Mukht Dilli' jointly with The Indian Cancer Society in NCR

Thank you