



ANNUAL GENERAL MEETING, APRIL 28, 2021, BENGALURU

Purpose-driven, profit focused, resilient performance

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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:

- 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
- Impact of ongoing pandemic

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

- Resilient in the pandemic period
- 2020 performance highlights
- Success stories
- Environment, Social & Governance in action
- Stakeholder engagement



Navigating challenging times

Multi-pronged strategy driven by the country management team

Prioritizing Health and Safety

- Adherence to safety protocols across ABB
- Promoting holistic employee well-being



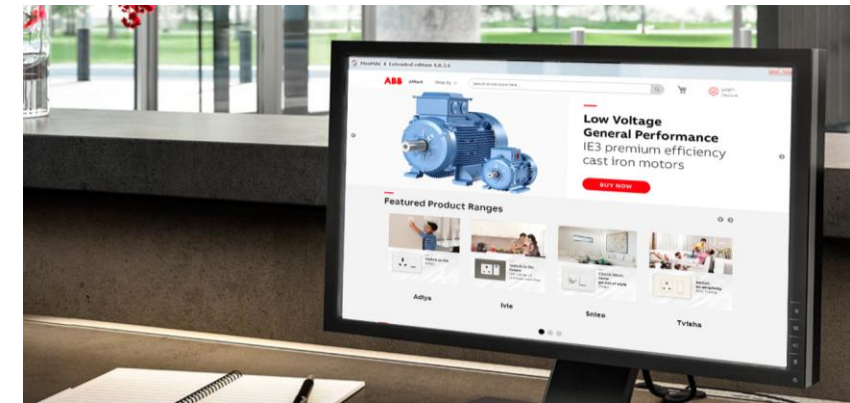
Sustaining Business Continuity

- Continued virtual customer connect
- Remote support for customers during lockdown



Continued Investments

- New Robotics facility with double capacity
- Launch of ABB online marketplace eMart



Supporting customers for business continuity during lockdown

ABB digital solutions supported Anthem Bio in keeping their operations running



Continued on-site support for critical sectors based out of different geographies within India

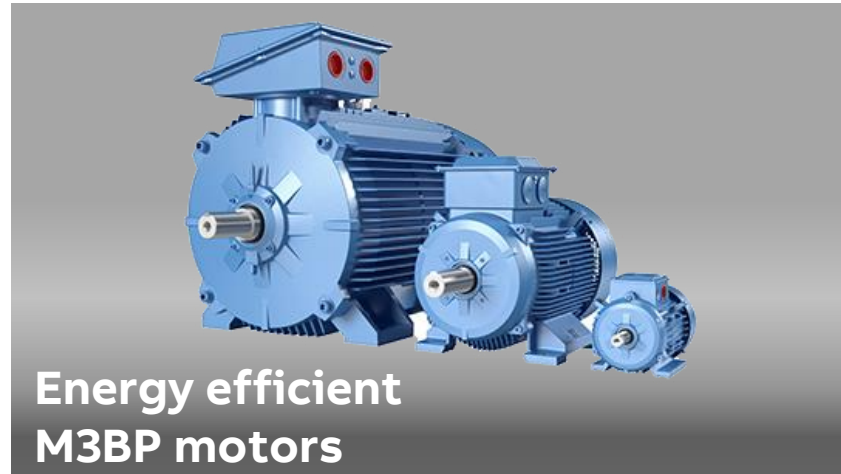


'Aatmanirbhar' Bharat

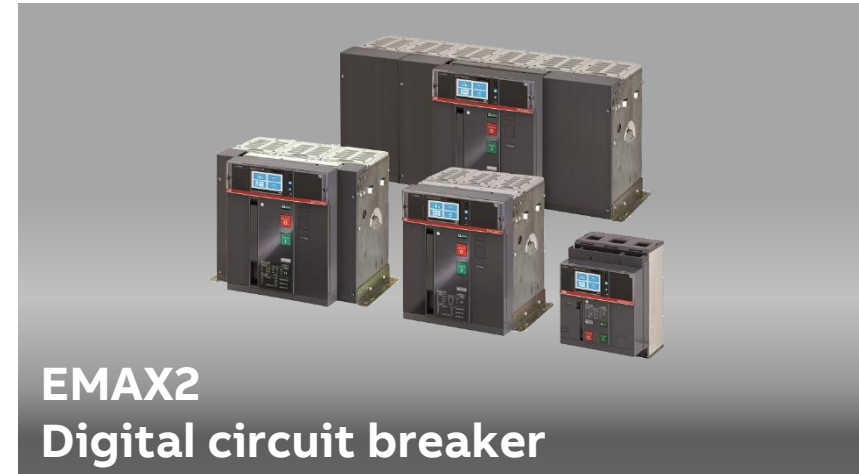
Consistent focus on localization; Currently 60% of the solutions made locally across divisions



Smart factories in Nashik and Nelamangala



Energy efficient M3BP motors



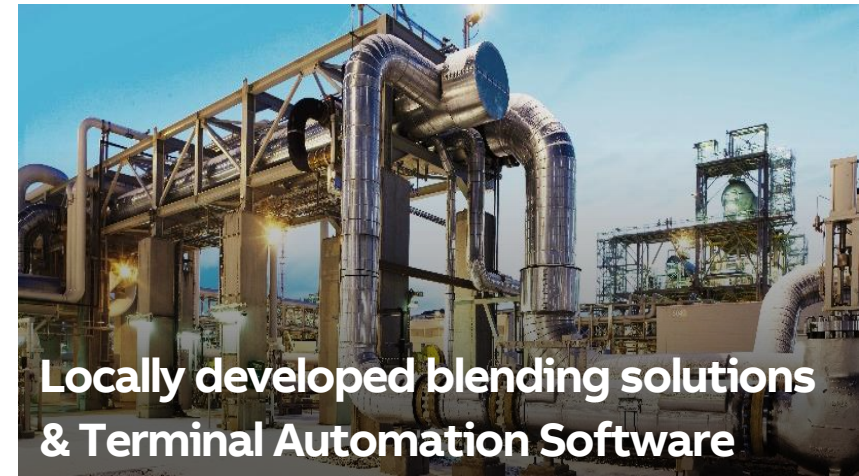
EMAX2 Digital circuit breaker



Launch of antibacterial switches and sockets - Tvisha



LEED certified green building for sustainable operations



Locally developed blending solutions & Terminal Automation Software

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ABB today: Four leading business areas with 21¹ divisions

Electrifying the future of
Mobility and Infrastructure

Driving energy efficiency
movement

Enabling safe, smart and
sustainable operations

Accelerating adoption of
smart machines and flexible
manufacturing

**BUSINESS
AREA**

Electrification



Motion



Process Automation



Robotics & Discrete Automation



DIVISION

Distribution Solutions

Smart Power

Smart Buildings

Installation Products

Power Conversion

E-mobility

IEC LV Motors

Large Motors & Generators

NEMA Motors

Drive Products

Systems Drives

Service

Traction

Mechanical Power Transmission

Energy Industries

Process Industries

Marine & Ports

Turbocharging

Measurement & Analytics

Robotics

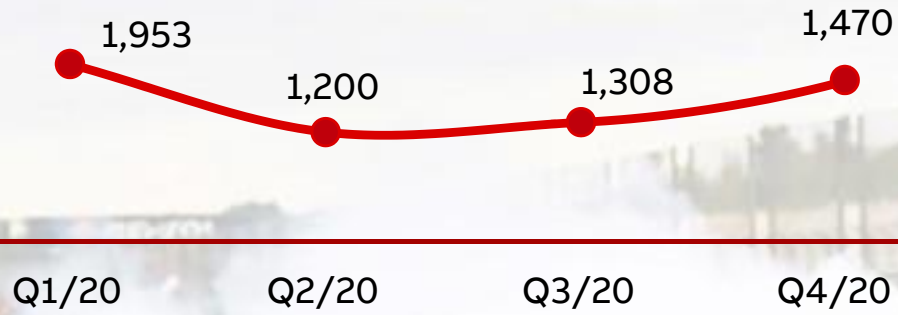
Machine Automation¹

¹ Machine Automation is still to be integrated with ABB India

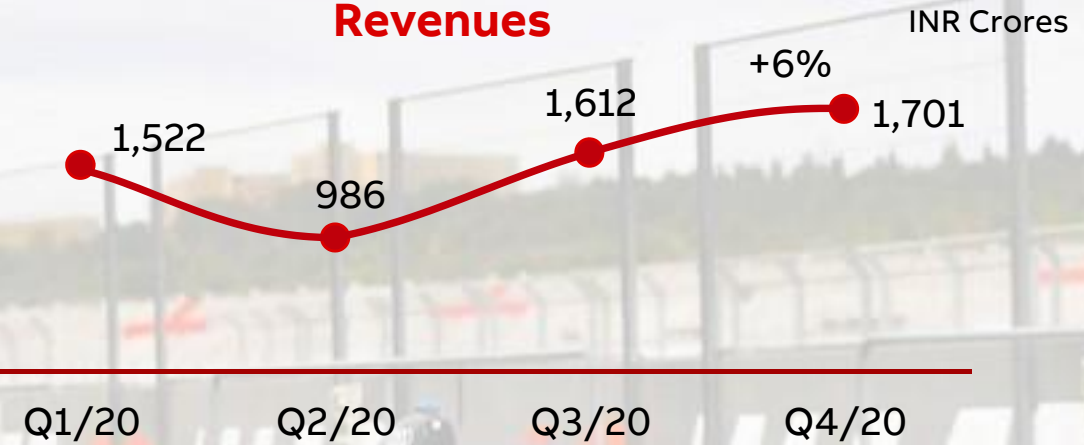
Solid performance in a volatile period

Significant step-up in profitability with a robust cash foundation

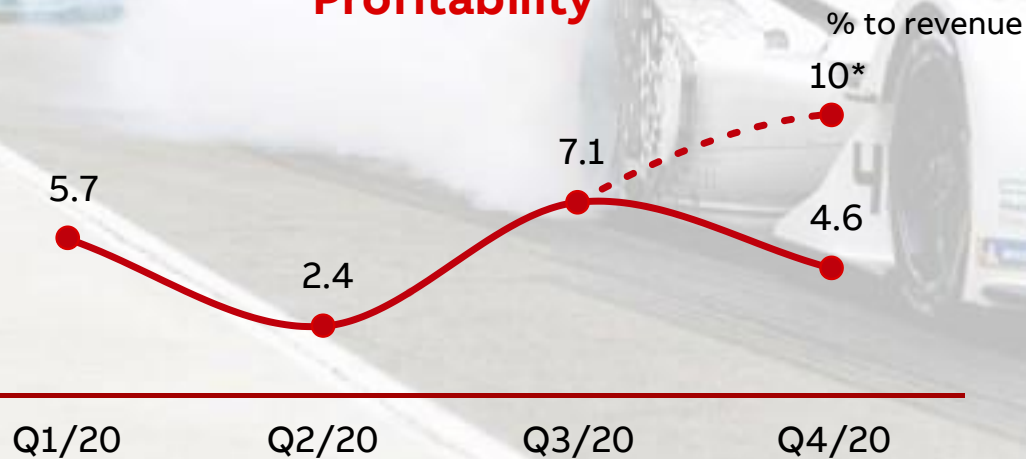
Orders



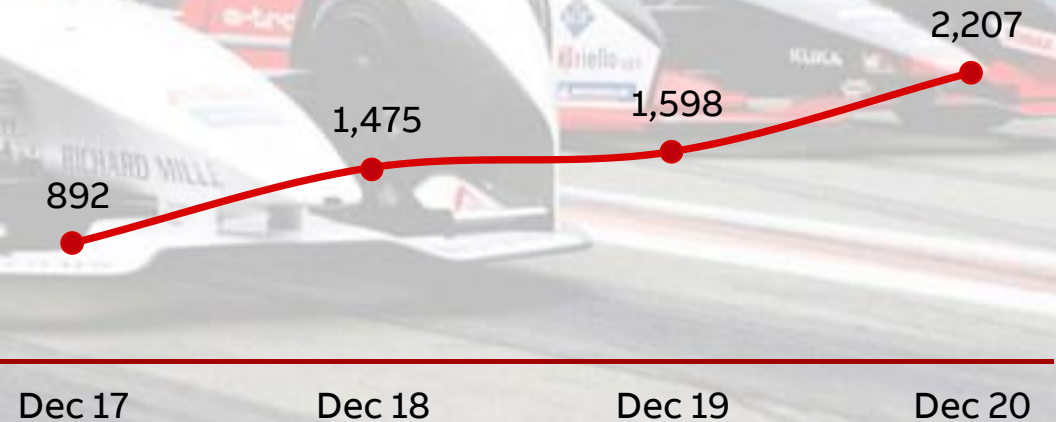
Revenues



Profitability



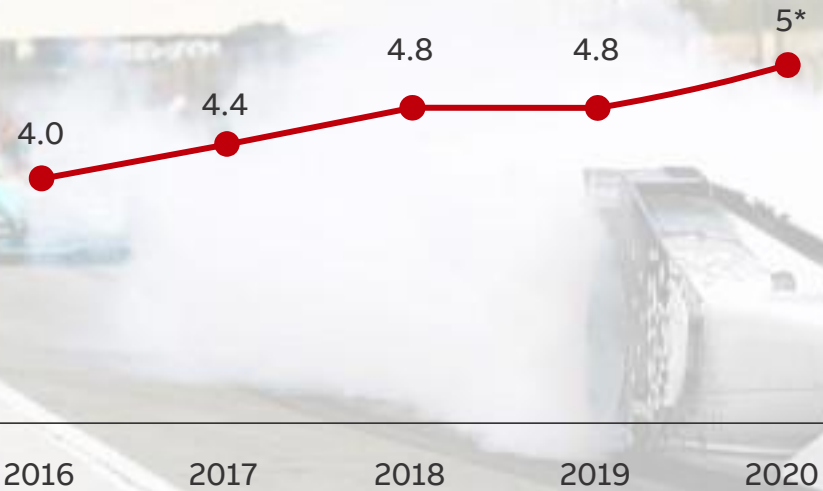
Cash



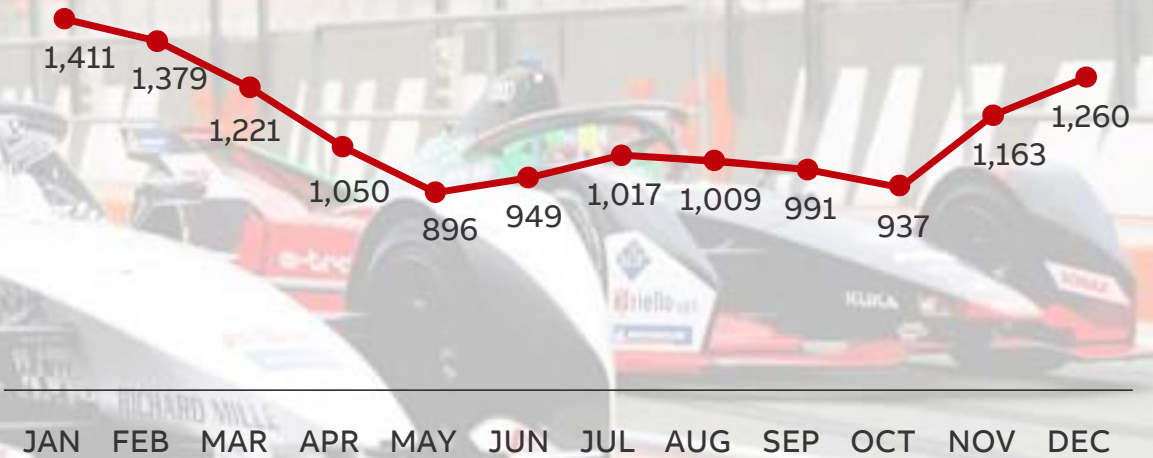
* PBT without provision

Delivering superior shareholder value consistently

Dividend (₹ per share)



Share price in 2020 (₹ per share)



* Proposed dividend

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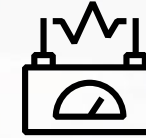
Key player in nation-building projects



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



More than **9,000+** 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

Partnering India's growth story, across sectors

Focused growth segments contribute 80% to ABB India business

High	Moderate	Moderate - low
Data Centres	Food & Beverage	Buildings & Infra
Renewables	Pharmaceuticals	Oil & Gas
Electronics	Power Distribution	Chemicals
	Water & Wastewater	Cement
	Railways & Metro	Steel
	Automotive	



Segment drivers

Data Centres

- Work from Home & Remote Connectivity driving demand
- Large Ticket Investments & advent of 5G

Renewables

- Push continues for 175 GW renewable target by 2022, 30GW Off-shore wind projects

Electronics

- Key sector benefitted by Government PLI Scheme
- Local Manufacturing Focus – Aatmanirbhar Bharat

Food & Beverage

- Focus on Agri Infra & New Agri Policy
- Good Monsoon & Early demand revival
- Key sector benefitted by Govt. PLI Scheme



One of the largest e-commerce companies uses ABB medium and low voltage products for its Data Centres



Cutting edge technology for the renewable energy segment

Reached the 5GW milestone in providing Programmable Logic Controller based solar plant automation solutions in India



Won 'Technology of the Year-Generator' 2020 Award from India Wind Energy Forum (IWEF)



Enhancing productivity for F&B sector

Driving efficiencies and product improvement for a farmer producer company through our Motion solutions



Leading FMCG companies in India trust our Robotics end-of line palletizing solution



Ensuring continued momentum and accelerated operations for the Pharma Sector

Terminal Automation System for a leading producer of Isopropyl Alcohol, a key component for sanitizers



A leading pharma company to deploy ABB's DCS - enterprise-wide manufacturing execution systems



24x7 reliable power distribution technology for Indian smart cities

ABB's Digital Compact Secondary Substation (CSS) and Ring Main Unit (RMU) to enable uninterrupted power supply for Indore and Ludhiana



Aiding efficient water management, conservation and distribution

Digital water management solutions for the drought-stricken district in Koppal, Karnataka



Partnering the Government for clean ganga mission through our reliable power distribution technology



More than half of India's metro network deploys ABB technology

Reliable 24x7 power distribution and traction technology for Agra & Kanpur Metro project



ABB's HVAC drives technology ensures sustainable and safe ventilation for Chennai Metro



Accelerating the journey towards sustainable transportation

OLA to deploy ABB robotics and automation solutions at its mega-factory for manufacturing electric scooters



Image credits: OLA

ABB to deploy EV charging stations for IOCL fuel stations across 76 locations in Tier 2, 3 cities in India



Enhancing user experience from hotels to highways

Building automation solutions to enhance guest experience for a hospitality major in Sri Lanka



Smoke venting motor to be deployed for the Mumbai Pune expressway tunnel ventilation



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Sustainability is embedded in our business

Low carbon society, preserving resources, social progress



Safety - 98.5%

“of hazards resolved
Don't look the other way”



Health & wellbeing

COVID-19 control, guidelines aligned itself with Govt of India protocols, Telemedicine and COVID-19 care package, special insurance packages to support with COVID-19 related hospitalizations.



Society - 12 community projects in 2020 impacting over 1 lakh lives with focus on contributing towards the pandemic



Waste - ~93%

Of all wastes generated were recycled



Green power - 40%

of total energy is sourced form green Power



Water ~30% reduction

Reduction in water withdrawal was reduced by 30% from the previous year*



Supplier sustainability 234 –

onsite assessments carried out so far (2010-2020). a new further comprehensive program called Sustainable Supply Base Management (SSBM) being launched

Implementing ESG Strategy

Driving sustainability to the last mile

Currently Under Execution

10 Point ESG Framework

Following indicators to be used for benchmarking across ABB India:

1. Green Infrastructure
2. Energy Efficiency Improvement
3. Renewable Energy
4. GHG Emission Reduction
5. Water Conservation
6. Material Conservation
7. Waste Management & Circularity
8. Green Supply Chain & Customer
9. Product Stewardship & Life cycle analysis
10. Innovation & Biodiversity

Green Infrastructure Activities



Phase 1
Green Factory Buildings



Phase 2
Green Manufacturing Process



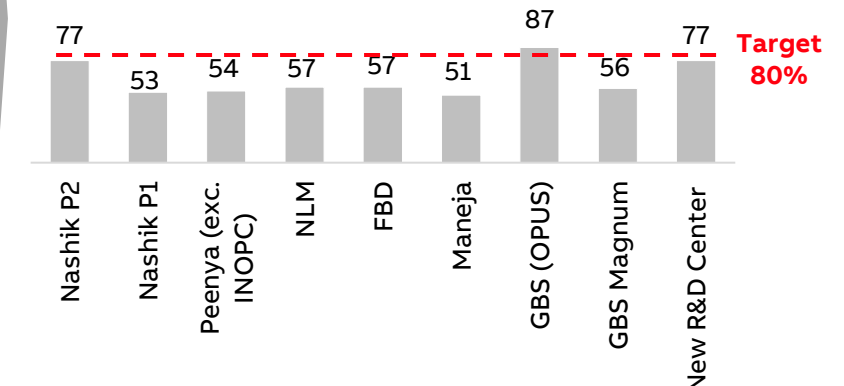
Phase 3
Green Products

Green Factory Building: Evaluation

Each location scored on below parameters:

- Site Efficiency
- Innovation in Design
- Water Conservation
- Indoor Environment and Health
- Energy Conservation
- Material Conservation

Green factory building Internal evaluation score (%)



Promoting diversity through Social Responsibility

Joins hands with Lila Poonawalla Foundation to build future women leaders in technology

Partnerships contours



- Lila Poonawalla Foundation:
 - Pioneer in the field of girl child education for
 - Driving Women Empowerment through merit-cum-need based Scholarships and Skill Building
- ABB **sponsoring 100** meritorious and economically challenged **Girls** with an interest in Science and Technology
 - **Financial** Support for fees
 - **Technical** trainings /guidance
 - **Mentorship**
 - Driving **holistic skill** development



Social outreach: 2020 highlights

Continued support to communities, special efforts towards COVID-19 challenges



COVID-19 relief contribution to PM CARES Fund



Ventilator accessories for COVID-19 patient management- Govt Hospital, Nashik



Road infrastructure and public road amenities upgradation in Peenya Industrial area



Mobile health care facility for underprivileged communities

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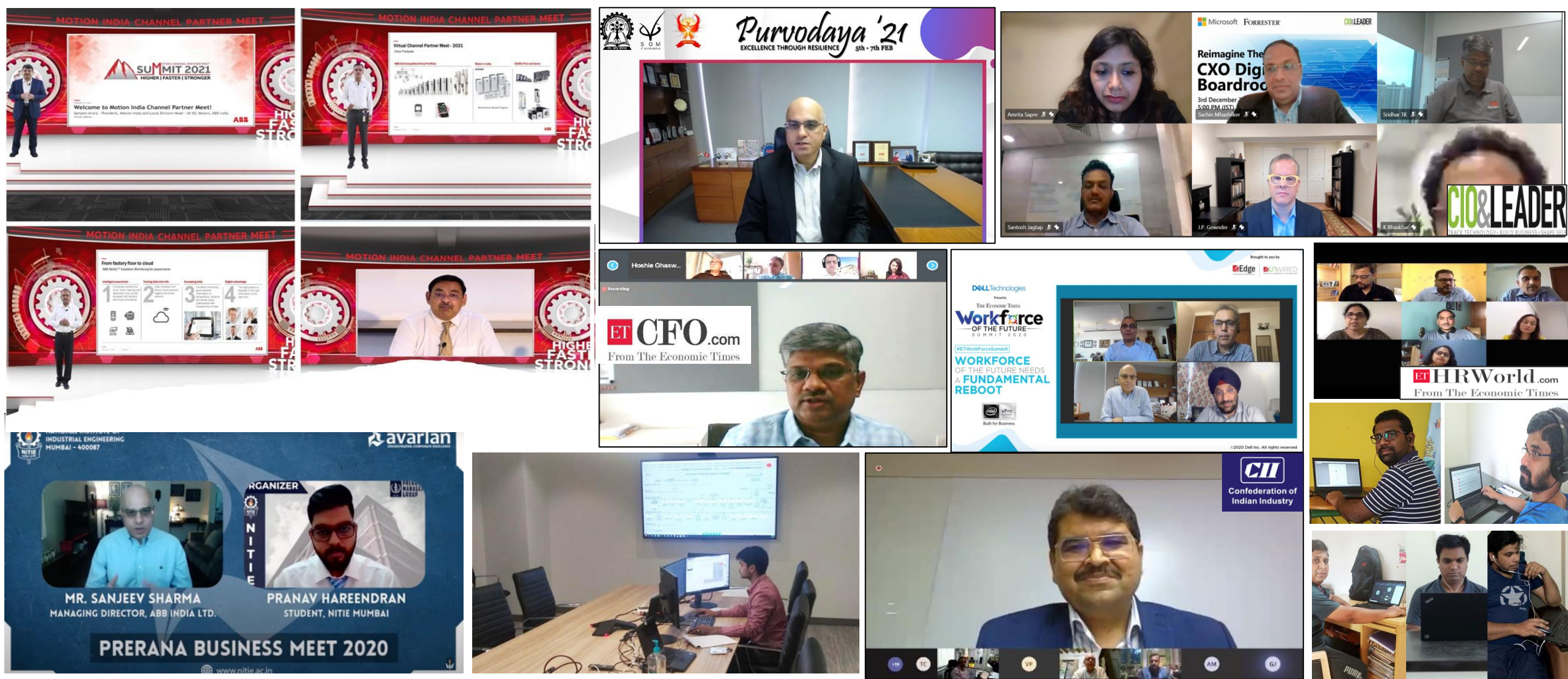
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Effective stakeholder engagement

Adapting to the New Normal: 200+ digital events, connecting 18,000+ Customers



ABB