



REF:INABB:STATUT:LODR:ANALYSTMEET:

May 30, 2018

BSE Limited  
P.J. Towers  
Dalal Street  
Mumbai 400 001  
(Attn : DCS CRD)

National Stock Exchange of India Ltd  
Exchange Plaza, 5<sup>th</sup> Floor  
Plot No. C/1, G Block  
Bandra-Kurla Complex, Bandra (E)  
Mumbai 400 051

Attn: Listing Dept.

Dear Sirs

Sub: Analyst / Institutional Investor Meeting

We are sending herewith a copy of presentation being made to Analysts / Institutional Investors today at Axis Rising Star Conference, Mumbai, for the information of the Stock Exchanges.

Thanking you

Yours faithfully  
For ABB India Limited

B Gururaj  
Deputy General Counsel &  
Company Secretary  
FCS 2631

Encl: as above



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AXIS RISING STAR CONFERENCE MAY 30, 2018

# Manufacturing in the Age of Digital

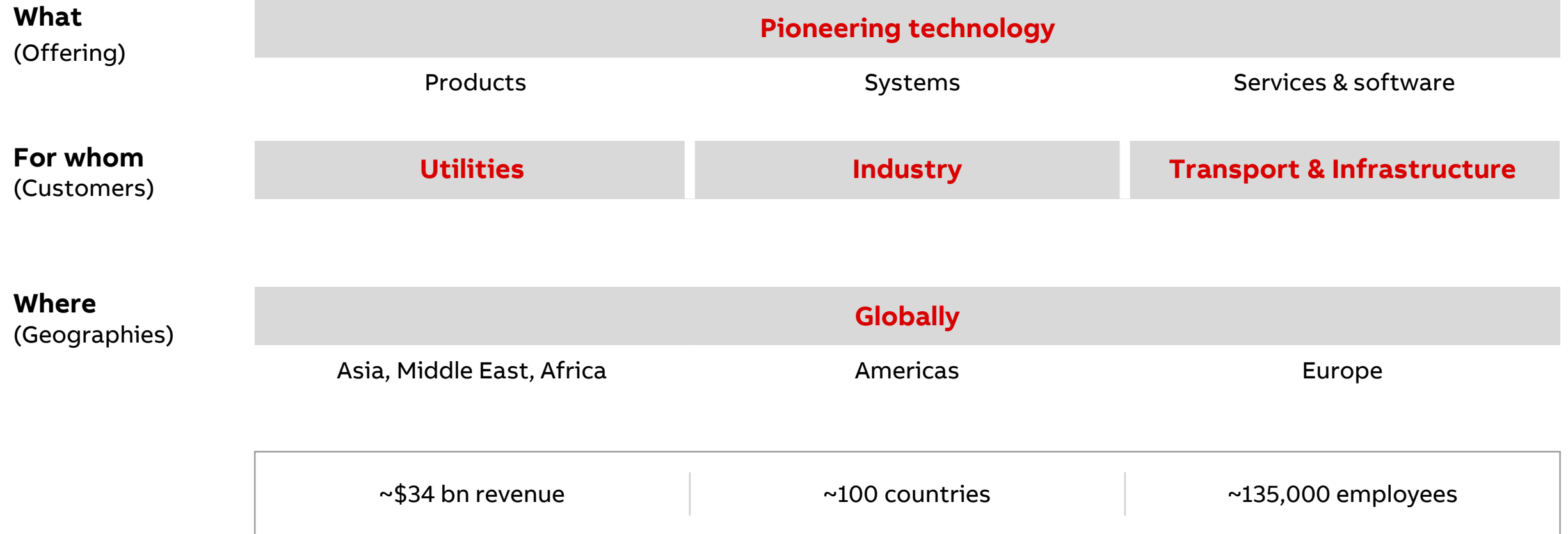
Mr. T.K. Sridhar

CFO, ABB India



# ABB: a global pioneering technology leader

>130 years of history, >50% of offerings are software based

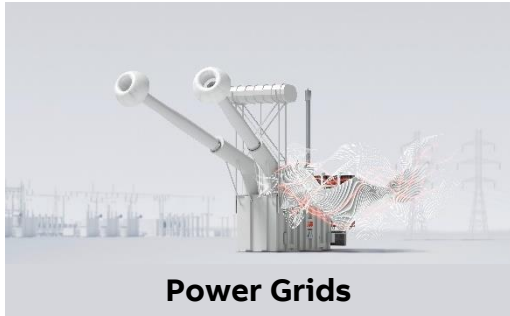


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# ABB offers customers two clear value propositions

**Bringing electricity from any power plant to any plug**

**Automating industries from natural resources to finished products**



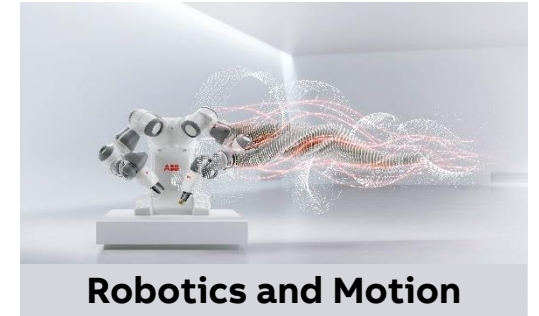
**Power Grids**



**Electrification Products**



**Industrial Automation**



**Robotics and Motion**

**Partner of choice for...**

... a stronger, smarter and greener grid

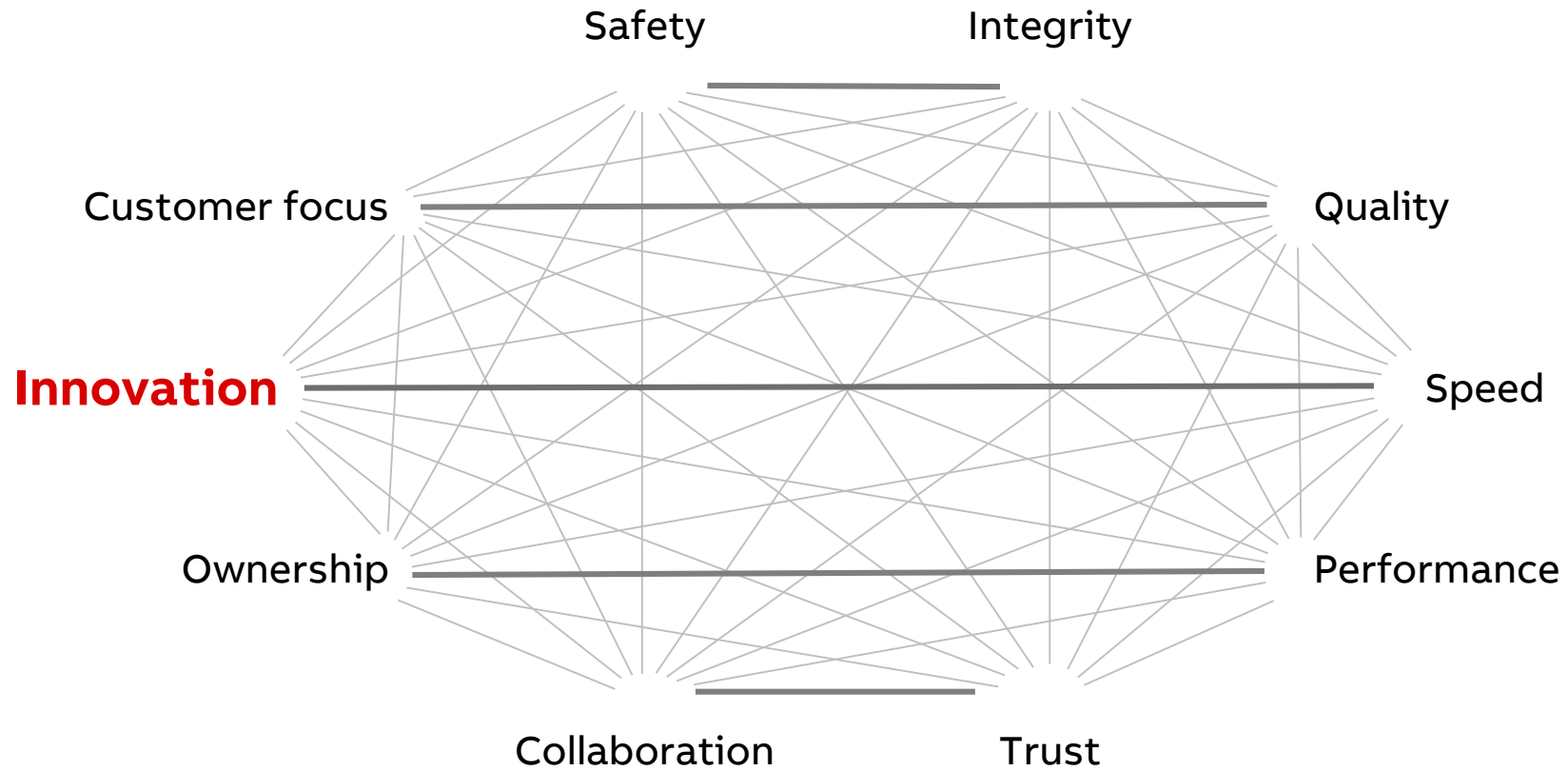
... electrification of all consumption points

... perfection in automation

... robotics and intelligent motion solutions

# Innovation – a key value for ABB

ABB value pairs

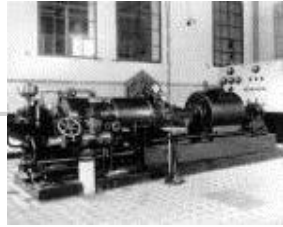


# ABB – pioneering technology leadership since the 19<sup>th</sup> century



Founding fathers

1900



Steam turbine

1920



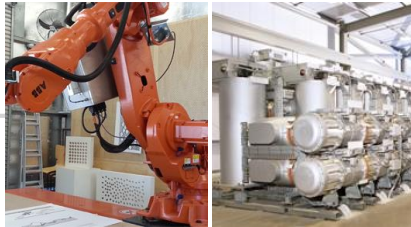
Turbochargers

1930



Gas turbine

1940



Industrial robot

Gas-insulated switchgear

1980

1970



Gearless motor drives

1960



HVDC

1950



Electrical drive system for locomotives



Variable-speed drives

1990



Electric propulsion systems

2000



Extended control systems

2010



Ultrahigh voltage

2015



YuMi®

# The Fourth Industrial Revolution (Industry 4.0)

## Industry 1.0 – 1712

First practical steam engine



## Industry 2.0 – 1870

First elevated conveyor belt



## Industry 3.0 – 1969

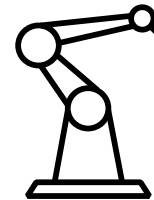
Electronics / software based control



## Industry 4.0 – today and tomorrow

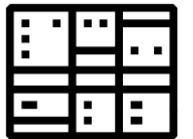
Internet of...

Things

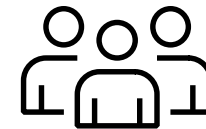


Internet of

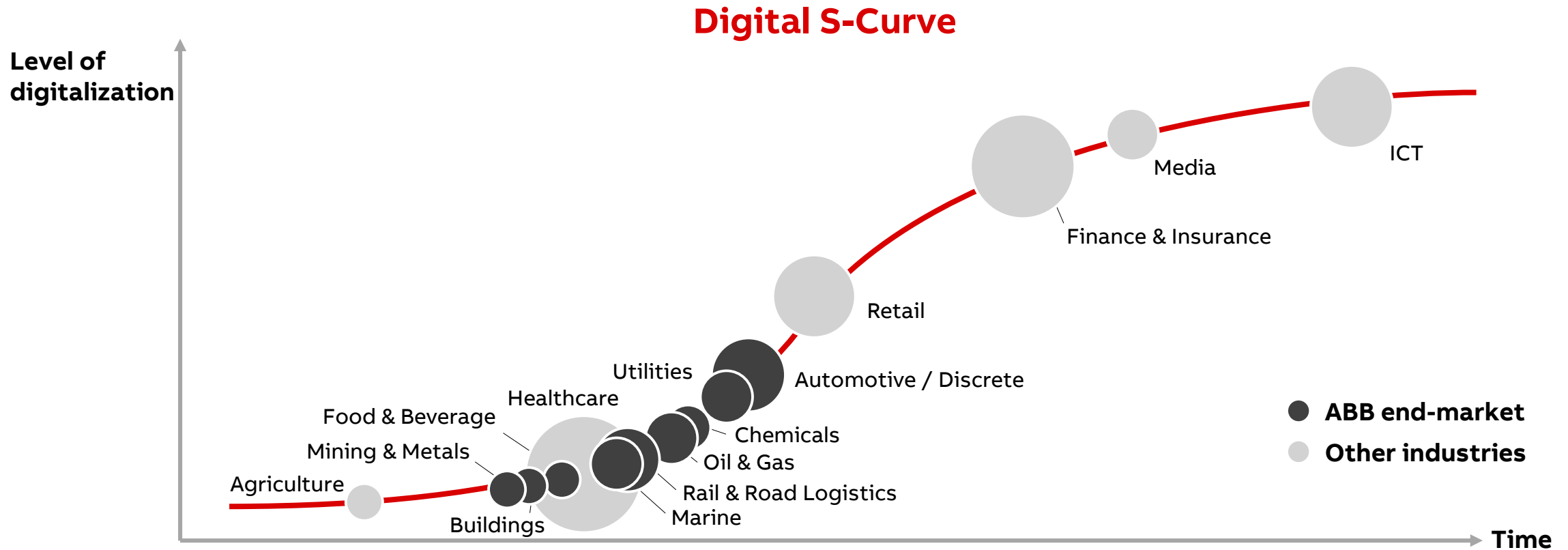
Services



People



# Opportunity for transformation through Digitalization





# ABB Ability™: brings industry leading digital solutions to our customers

## 210+ ABB Ability™ solutions

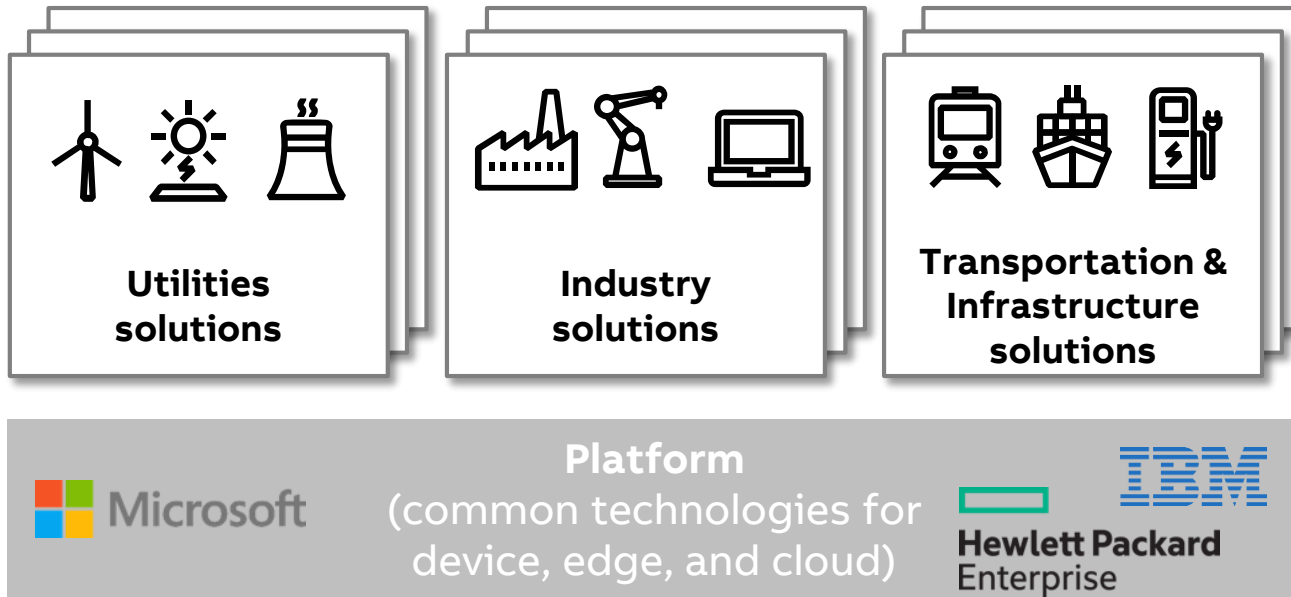


ABB Ability™

**What**

Delivers customer value (safety, uptime, speed, yield...) with AI based solutions

**How**

Provides ABB with efficiency and scale through AI  
Our customers own their data and IP

# Increasing customer value along the entire lifecycle with ABB Ability™ solutions

Customer asset lifecycle



Our enhanced digital value proposition

210+ ABB Ability™ solutions for industry

Our “traditional” value proposition

Our customer relationship

Planning partner

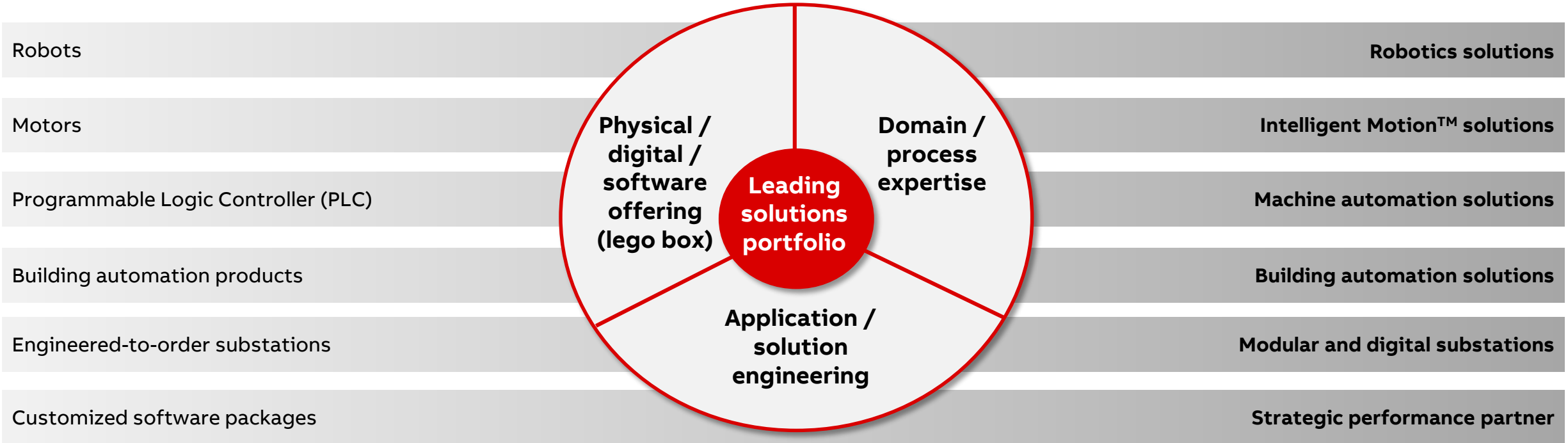
Product, solutions, systems partner

Operations partner

# Enhanced customer value through solution-oriented business model

From...

To...

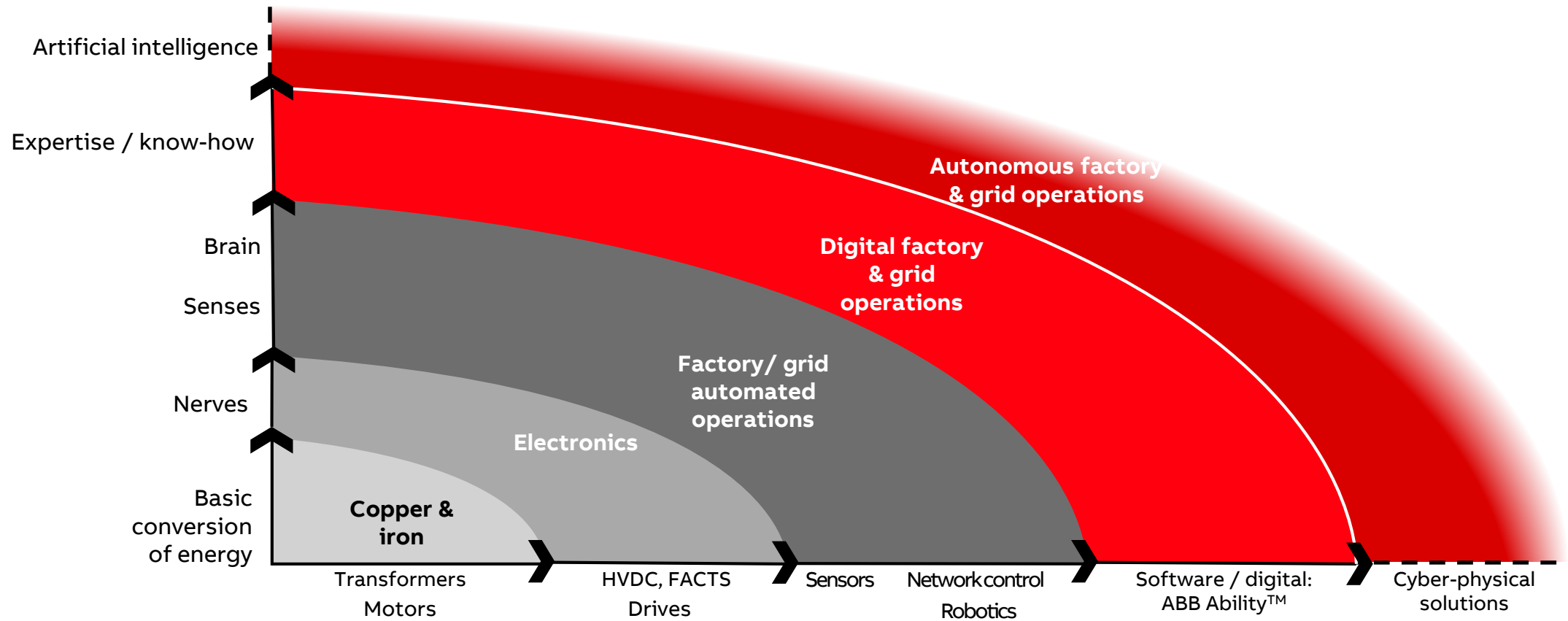


Stand-alone offerings

Solutions for customer value

# Innovation leadership for utilities, industry and transport & infrastructure

Innovation leadership enables quantum leap in performance



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# ABB in India

# ABB in India

Making in India for close to six decades



**~11,000** employees  
**~2,500** technologists



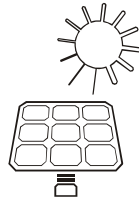
**47** factories  
**22** customer serving branches  
ABB's **largest** corporate research center



Annual revenue of  
**\$1,416 mn**



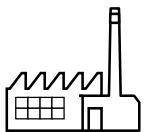
**6 HVDC** links  
of a total 14 in India have  
been executed by ABB



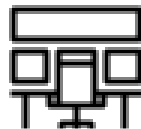
**50%** of solar power  
generated in India passes  
through ABB equipment



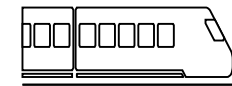
**60%** of India's oil  
production monitored  
by ABB solutions



**50%** of cement plants  
commissioned in the last  
5 years run on ABB's  
control system DCS



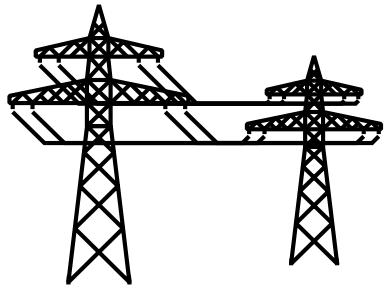
**370** digitalization  
contracts signed across  
**80** countries



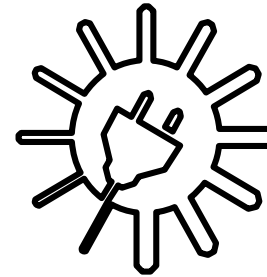
**All** 8 operational metros  
across the country run  
on ABB technology

# Writing the future in India

Partnering the government's visions



**24/7  
Power to all  
by 2019**



**175 GW  
renewable  
energy by 2022**



**100 smart  
cities**

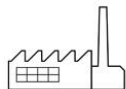


# Driving the energy evolution in India

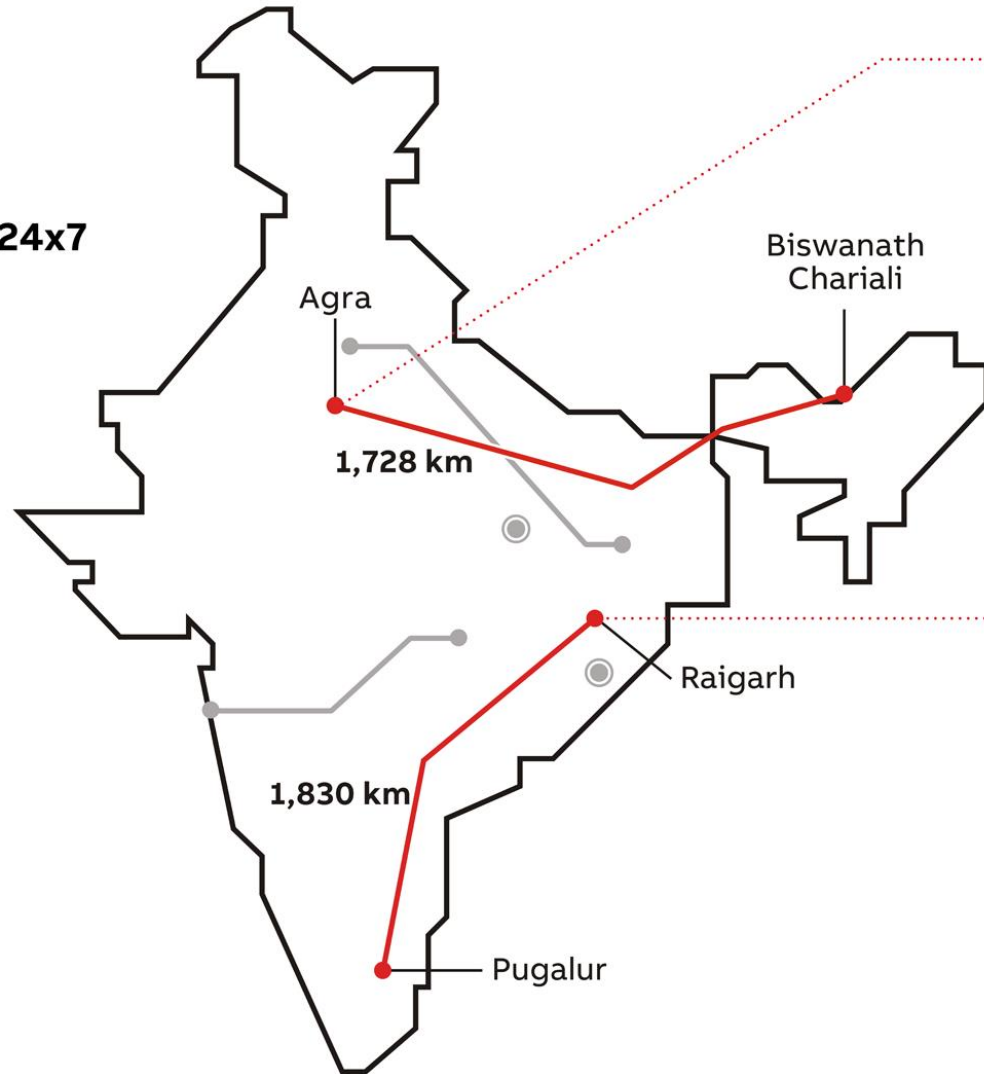
Transmission links that bring reliable 24/7 power to over 150+ million people



In alignment with government's vision of **24x7** reliable power for all



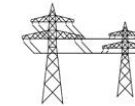
Great example of **Make in India** leveraging our strong footprint in India



## North-East Agra HVDC link



The link will can transmit **8,000 MW** of electricity



**World's first** multi-terminal ultra-high-voltage direct current link

## Raigarh-Pugalur HVDC link



**6,000 MW** transmission link with a capacity



Integrating thermal and **wind** energy for power transmission to distant centers



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# Driving the energy evolution in India

Stronger, greener and reliable grid

>5GW of solar inverter installation across India



First digital substation in India powering 350 IT companies in Kerala



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# Writing the future of industrial digitalization

Increasing productivity, quality and safety

Smart factory for India's second largest selling biscuit



Leading the digital transformation of India's largest cement producer



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# Strengthening India's water infrastructure

Mahatma Gandhi Kalwakurthy Lift Irrigation Project, Telangana



# Transforming infrastructure & transportation

Accelerating sustainable urbanization

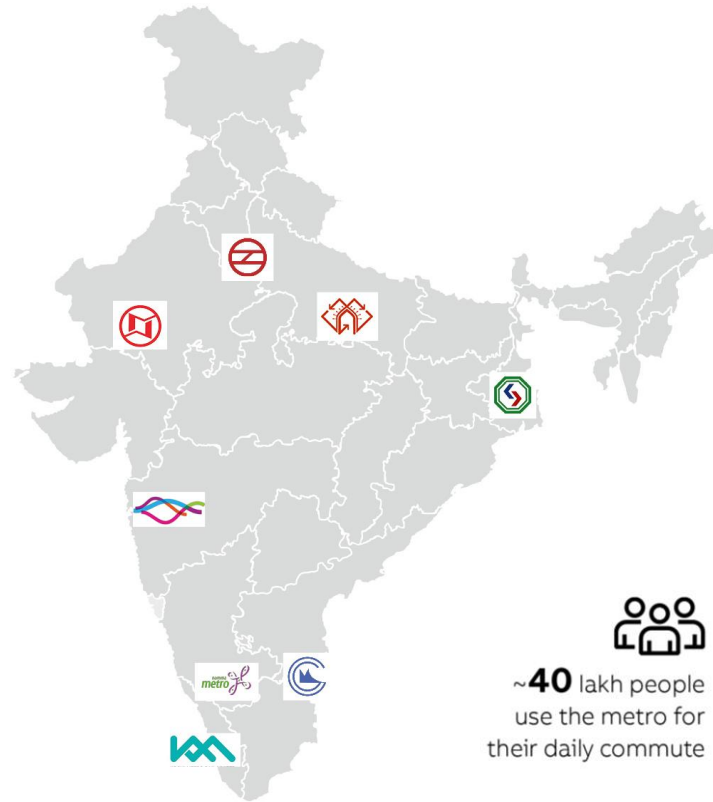
## Powering 8 metros across India



**40%** of India's population to live in cities by **2030**



8 operational metros, 7 under construction and **16 planned**



Average **time spent** every day in traffic in a metro city



**CO<sub>2</sub>** emissions in India to touch **19.6 mn** tons in 2030



~**40** lakh people use the metro for their daily commute

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## The new era of e-mobility has arrived in India

E-rickshaws in Jabalpur will save 17,000 tonnes in CO2 per year



# Technologies and solutions for the next generation

Engaging with policy makers, leading institutions

NITTTR, Chandigarh



IIT Madras



Niti Aayog



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# Investing in our future

ABB's largest manufacturing campus in Vadodara powered by microgrid and home to ABB PowerTEC

Solar powered microgrid in Maneja saves 1,400 tonnes of CO2 per year

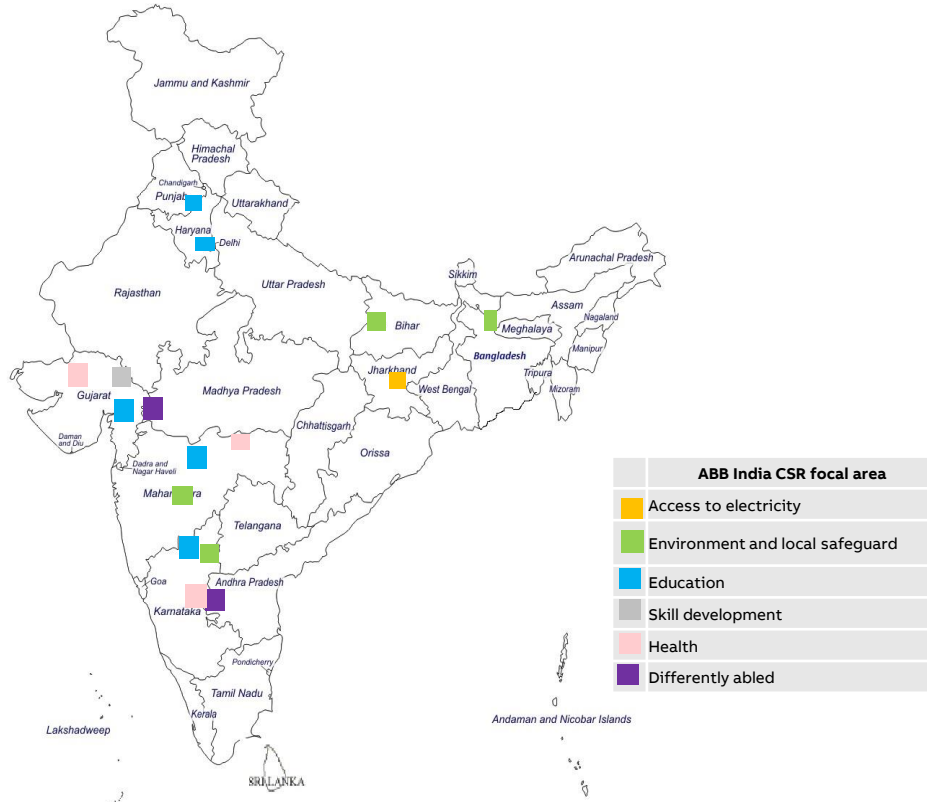


Leading institute to train our customers on the latest digital technologies



# Committed to social development

~100% of allocated CSR budget deployed in 2017



2017 CSR spend: 95 MINR





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## ABB Formula E: Pioneers united

ABB is title sponsor of the world's first fully electric, international FIA motorsport series





**ABB**