

Ref: MLLSEC/101/2023

Date: 24 July 2023

To,
BSE Limited,
(Security Code: 540768)
Phiroze Jeejeebhoy Towers,
Dalal Street, Fort,
Mumbai - 400 001

National Stock Exchange of India Ltd.,
(Symbol: MAHLOG)
Exchange Plaza, 5th Floor, Plot No. C/1,
"G" Block, Bandra-Kurla Complex,
Bandra (East), Mumbai – 400 051

Dear Sirs,

Sub: Chairman Presentation at 16th Annual General Meeting

Please find enclosed copy of the presentation to be made by the Chairman at the 16th Annual General Meeting scheduled today, i.e. Monday, 24 July 2023 at 3:30 p.m. (IST).

This intimation is also being uploaded on the Company's website and can be accessed at the weblink:
<https://mahindralogistics.com/corporate-announcement/>

Kindly take the above on record.

Thanking you,
For **Mahindra Logistics Limited**

Ruchie Khanna
Company Secretary
Enclosure: As above

Igniting Success▶▶

Road To Rise

Accelerating Value Creation

mahindra
LOGISTICS

The New Normal

Igniting Success ▶▶



KEY FOCUS AREAS

BUSINESSES



RESILIENCE



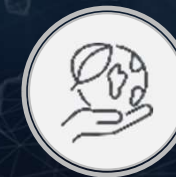
TECHNOLOGY & INNOVATION



AGILITY



HEALTHCARE



SUSTAINABILITY



EQUALITY

GOVERNMENT

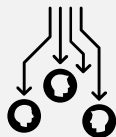
India – Resilient & Resurgent

- India's GDP has reached **\$3.75 trillion** in 2023,
- Bright spot' in the global economy - fifth largest economy in the world
- Propelling towards a path of “inclusive” growth
- Easing of supply chain constraints helped drive recovery in many sectors, especially in automotive and discrete manufacturing
- Unprecedented expansion in infrastructure - Substantial investments made across sectors
- Significant public sector and government investments in areas of climate change and decarbonization



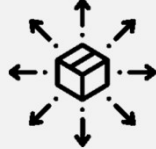
India's Logistics sector – A year of transformation

1



National Logistics Policy (NLP)

2



Digitalization
ULIP & ONDC

3



Integrated
Development
Gati Shakti

4



Decarbonization
programs

Foster the growth of formalized players
Support reduction of logistics costs to 8-10% of GDP
Accelerate Make In India

Rise to be 10,000 Crores by FY 26

Create
integrated, customized
logistics and mobility solutions through
technology, people and
process capabilities

ACCELERATING
COMMERCE
EMPOWERING
COMMUNITIES TO
RISE

Business Highlights FY 22-23



3PL Contract Logistics

- Growth in integrated solutions and technology
- Expanding our warehousing network, and solutions
- Supported by strong recovery in Auto & Manufacturing



Cross Border

- Ocean Freight prices down ~80% YoY
- Volume growth YOY in air services
- Extended connectivity to 55 core trade lanes with support to 200+ locations
- Launched air charter services based in the UAE



Last Mile Delivery

- India's largest EV Cargo network
- Strong organic growth of 16 %
- Driving synergy with Whizzard acquisition
- 200+ locations across India



B2B Express

- Demonstrated consistent growth
- Strengthened by Rivigo acquisition
- Pan India coverage - 19,000+ Pin-codes
- 270 Hubs and Branches
- 400+ business associates



Mobility

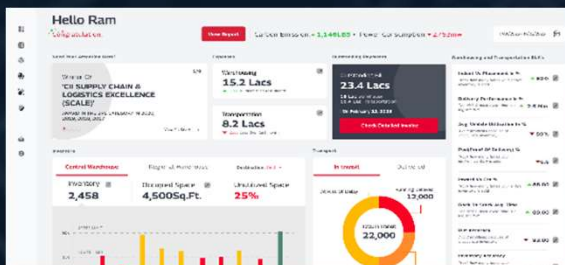
- Expanded with the acquisition of Meru
- Cost reduction & synergy driving reduction in losses
- Demand expected to improve in FY24 with Return To Office being normalized

Acquisitions – Accelerating our journey



Deep Digital Capabilities
Network Expansion
Integrated offerings

Technology & Automation



- WMS - Handheld based inventory mgmt.
- TMS – End to end transport mgmt
- Electric Last mile delivery suite
- Optimization Suite – Load / route optimization
- Global Ocean and Air Freight Mgmt ERP
- Algorithm based Express B2B tech suite



- Handheld compatible WMS
- Drone based inventory counting
- Auto guided vehicle / Bots



Catapult 3.0 attracted an impressive pool of 167 start-ups from the Supply Chain & Mobility sector.

People First

Our family has grown **24,500+** members



Becoming a more inclusive organization



Drive to Net Zero

Carbon Neutral by 2040



4+ Mn Sq Feet
Solar Powered warehouses



25 Million
Green KM with EVs



1,500+ EV
3W and PV



~ 1,300 MT CO2
Savings in electricity consumption



5 IGBC Gold & Platinum
Certified buildings



Accreditation
Ecovadis - Bronze



5% reduction TCO2/E
Scope 1+ 2 per SBTi



~11 Million Kms
Alternative fuels



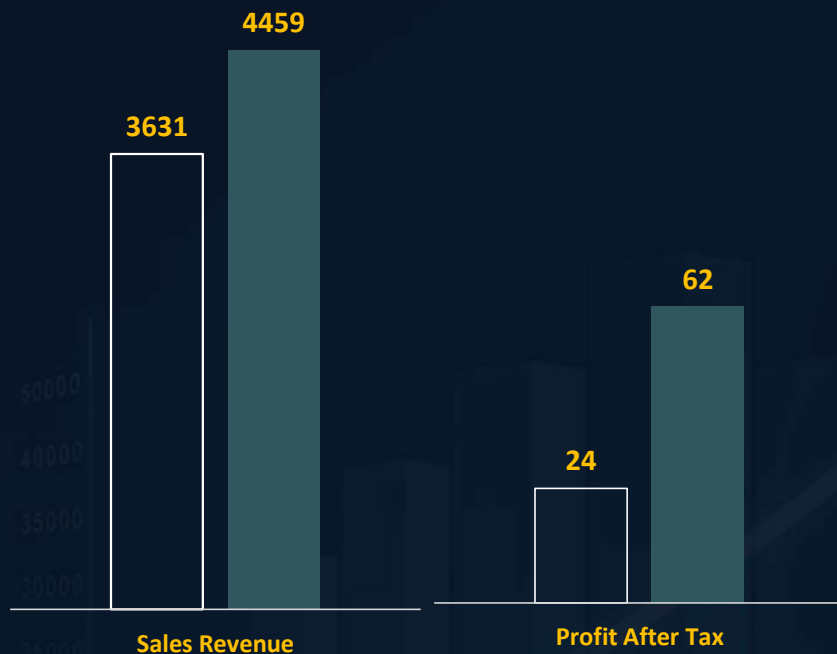
13,440
Trees planted



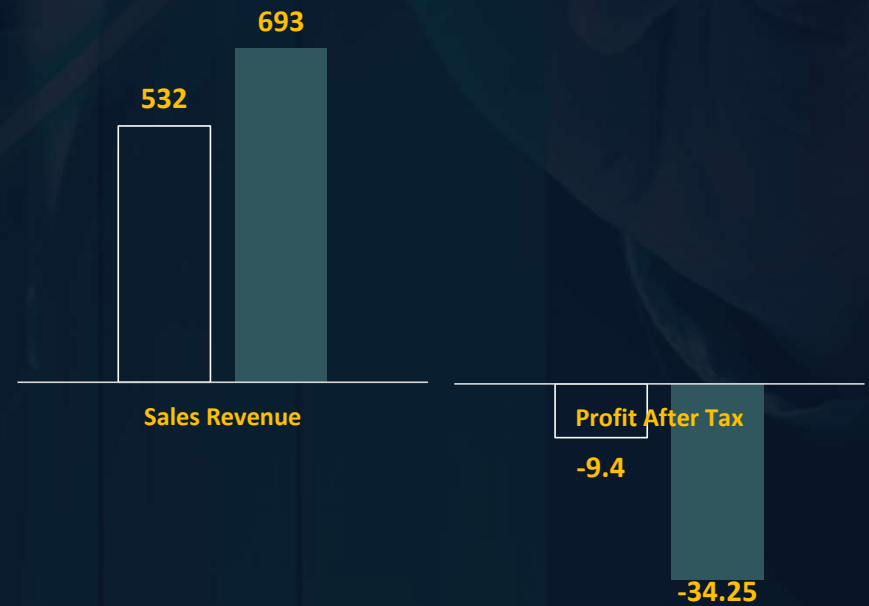
10% Reduction
Water consumption
(7,584 KL)

Financial Summary

Standalone MLL (Rs. Crore)



Subsidiaries Rs. Crore)



Path to Value Creation



- ▶ Growing the 3PL business by increasing share of solutions and cost optimization
- ▶ Scale up of new businesses driving revenue and margin enhancement
- ▶ Driving operational excellence across all segments with Common Operating Systems & unlocking synergies
- ▶ Continuing to accelerate the turnaround of the mobility business

"Dream about achieving
the impossible - because
impossible things do happen."

Keshub Mahindra
1923-2023



Igniting Success▶▶

Road To Rise

Accelerating Value Creation

mahindra
LOGISTICS