



SUNOLOGY

REACHING PEOPLE AND TOUCHING LIVES GLOBALLY
AS A LEADING PROVIDER OF VALUED MEDICINES

ANNUAL GENERAL MEETING

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MEET THE TEAM



Lisa George
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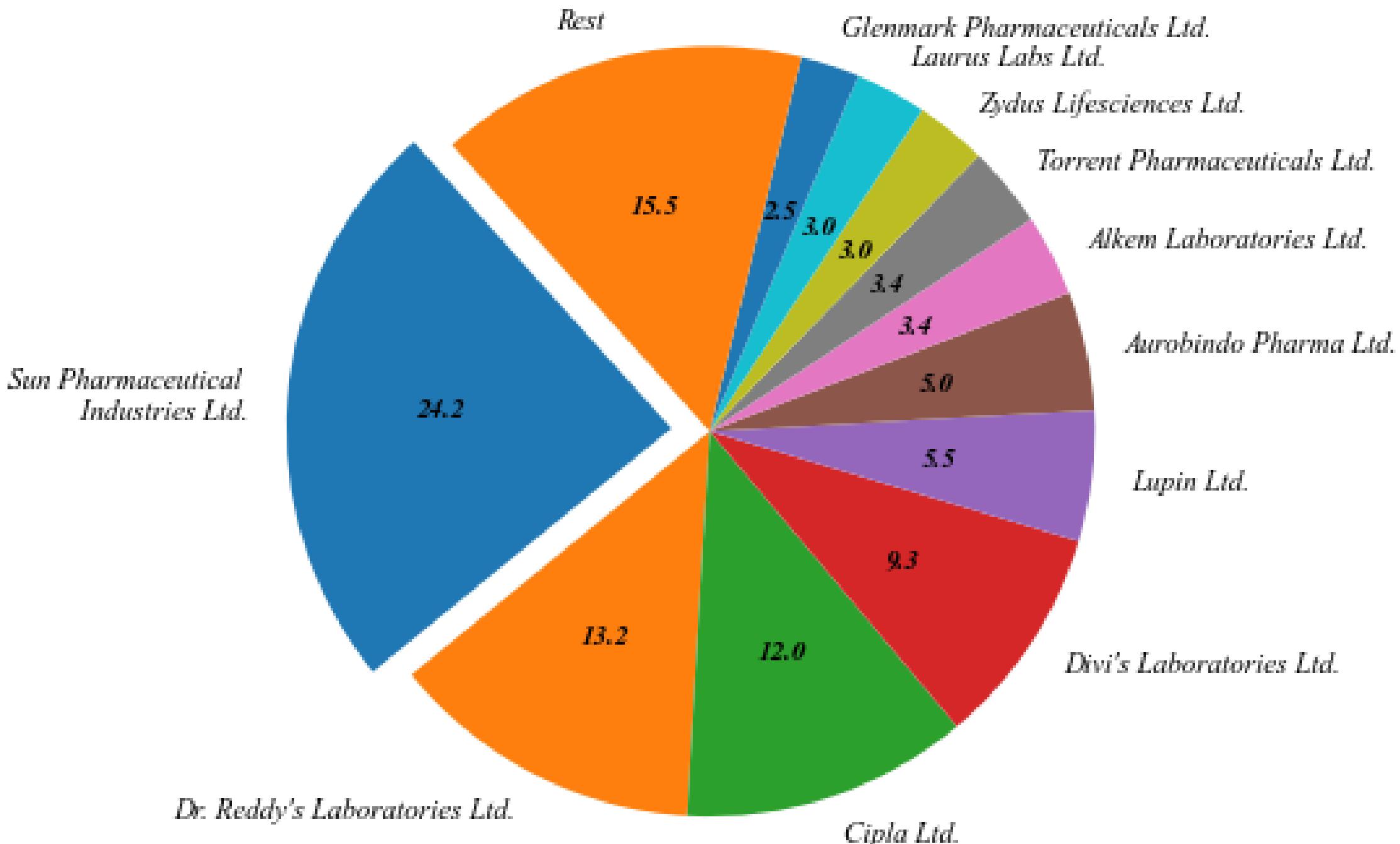


Jubin Joseph
(Head of Marketing)



<https://sunpharma.com/>

Market Weight(%) of Nifty Pharma Constituents

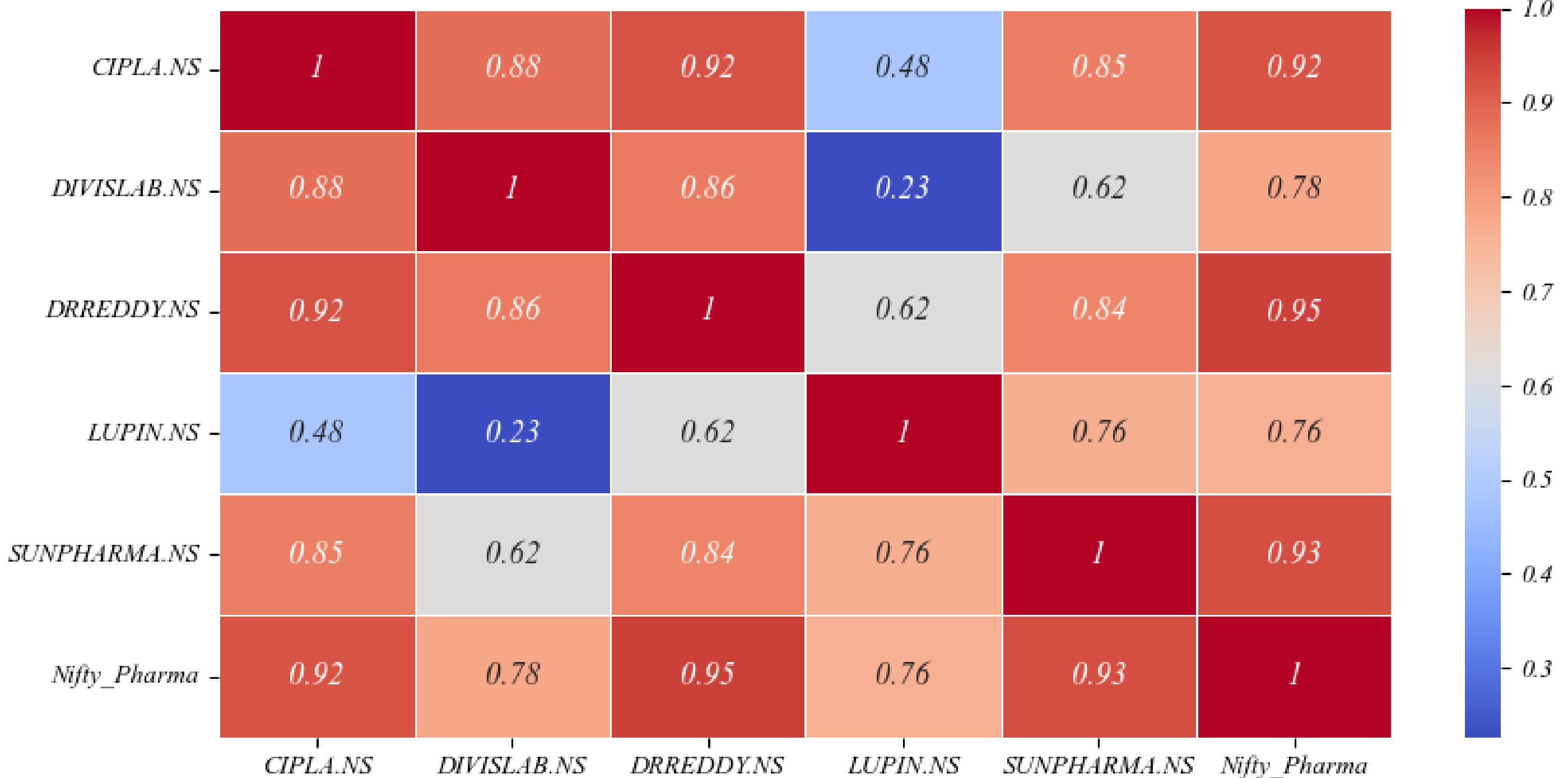


**40 YEARS FURTHER
AND STILL THE
MARKET LEADERS**

WE MOVE THE MARKET

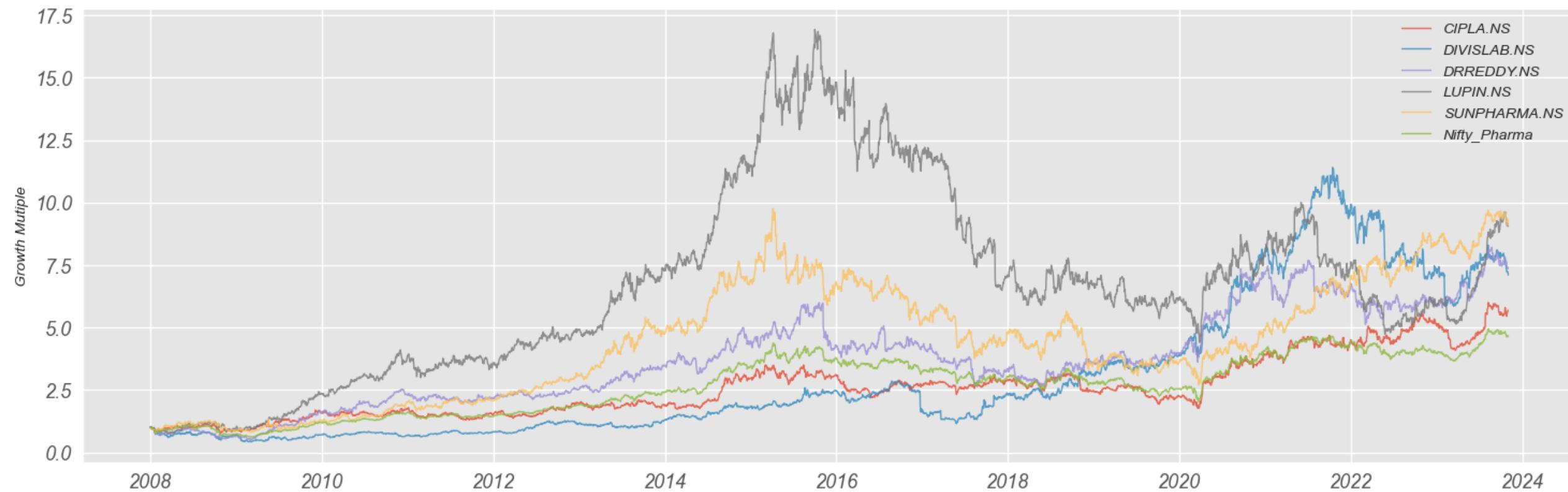


Heatmap : Nifty Pharma and Its Major Constituents

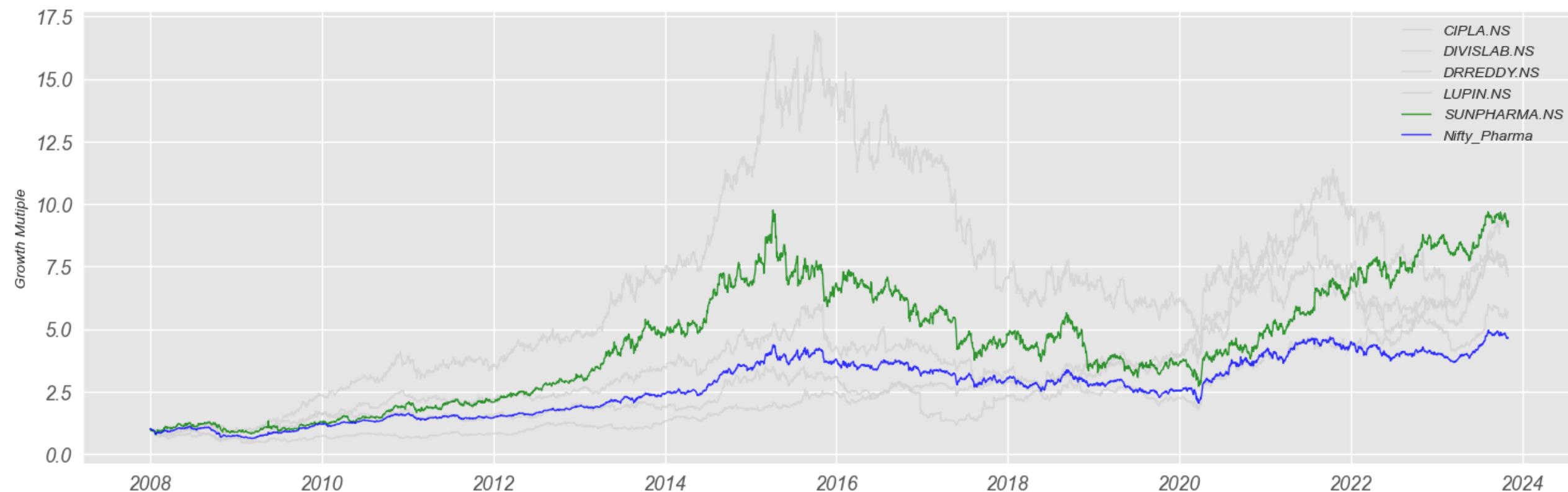




Relative Growth b/w Top 5 Constituents and Index



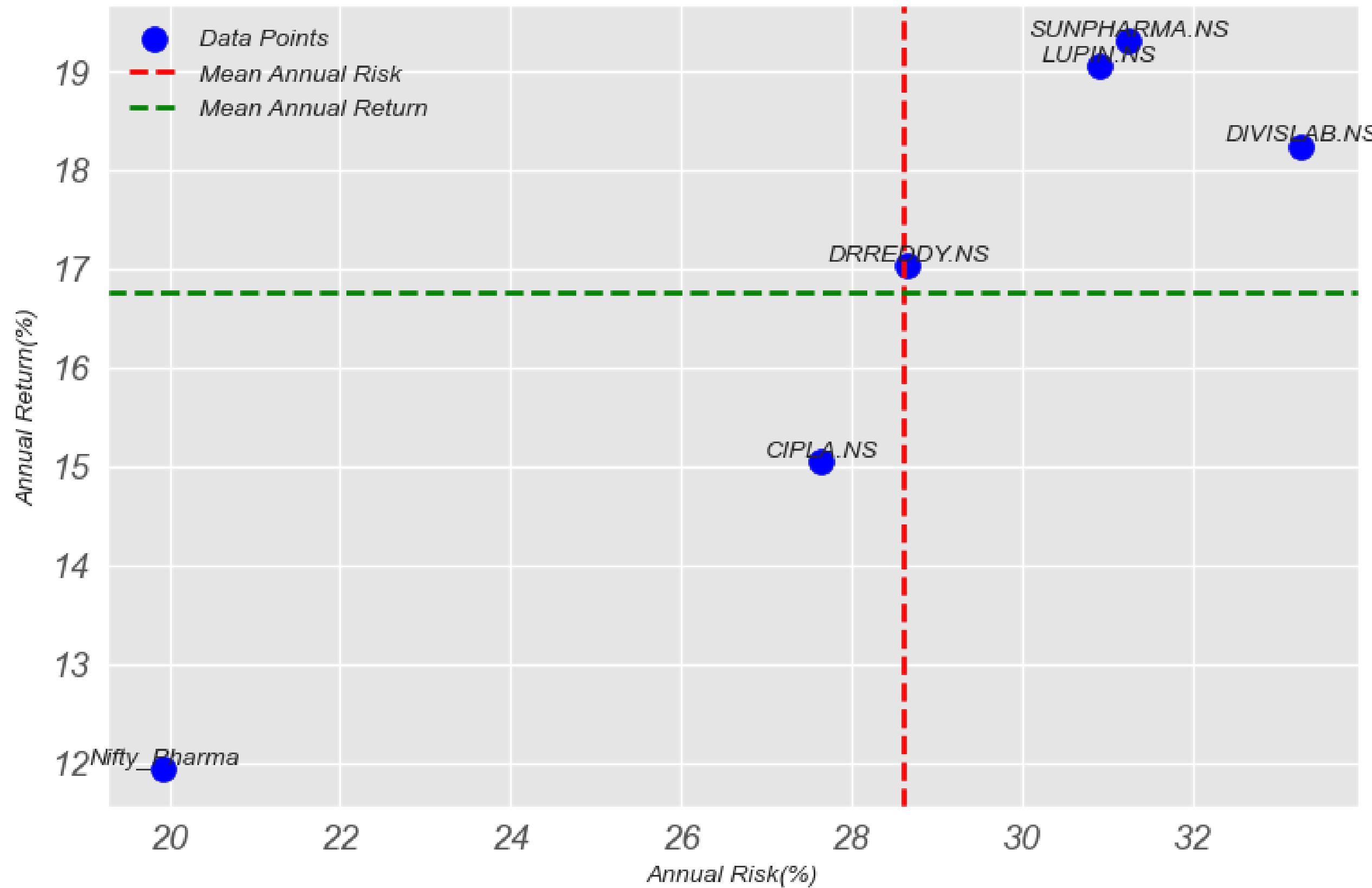
Sun Pharma Growth vs Index



WE NEVER
DISAPPOINT

OUR NUMBERS SPEAK FOR THEMSELVES

Risk Return Analysis

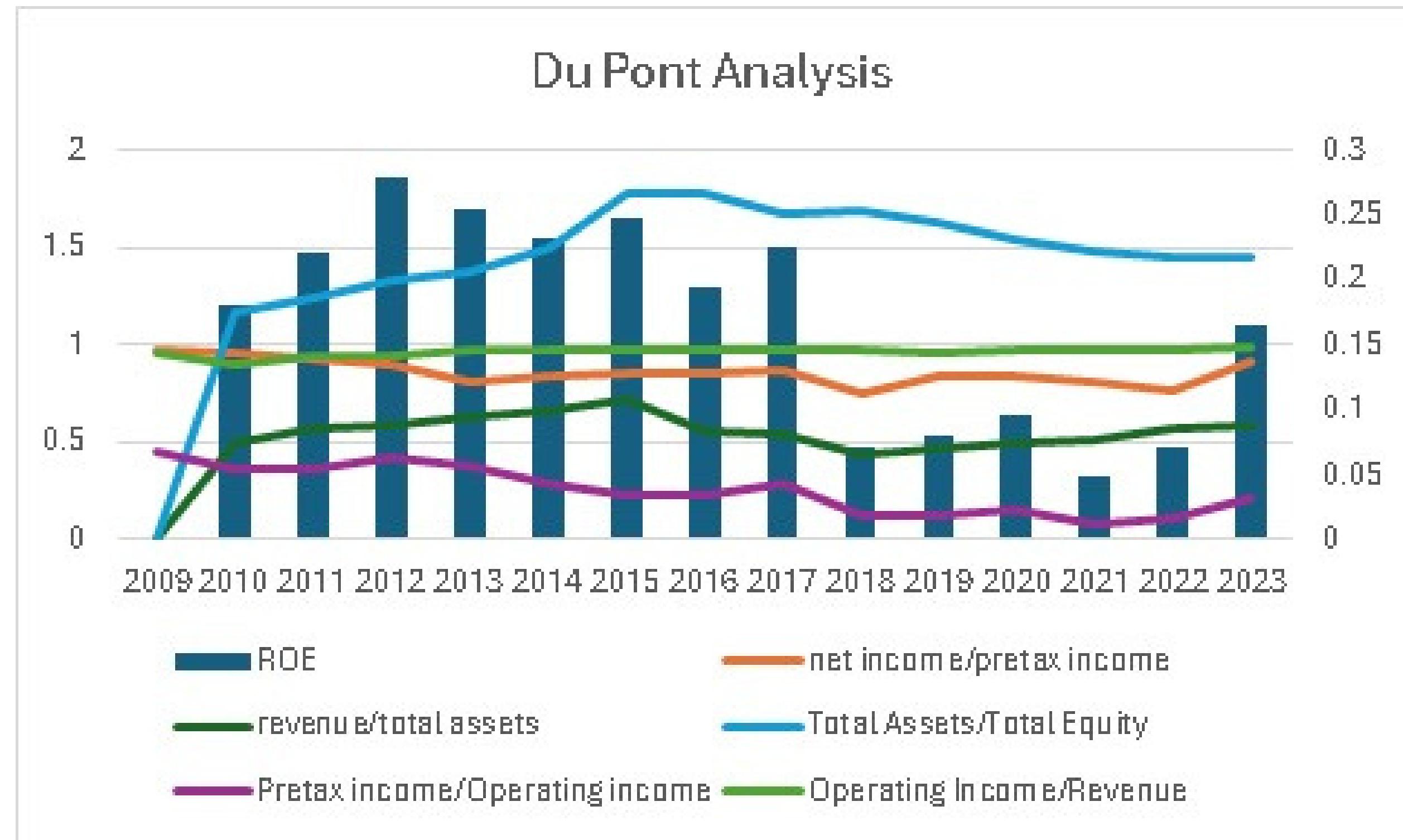




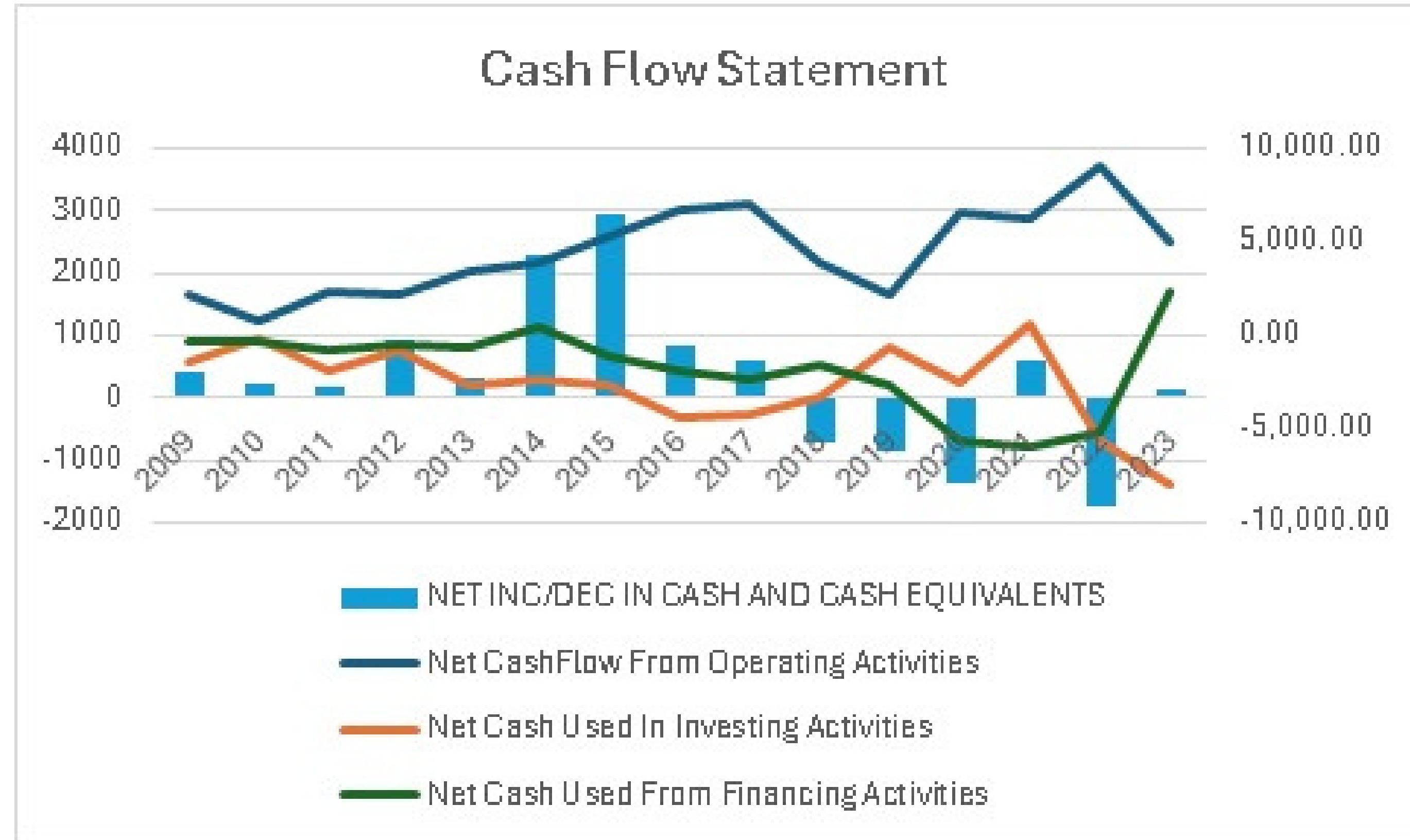
FINANCIAL OVERVIEW

**VARUN NAIR
(CFO)**

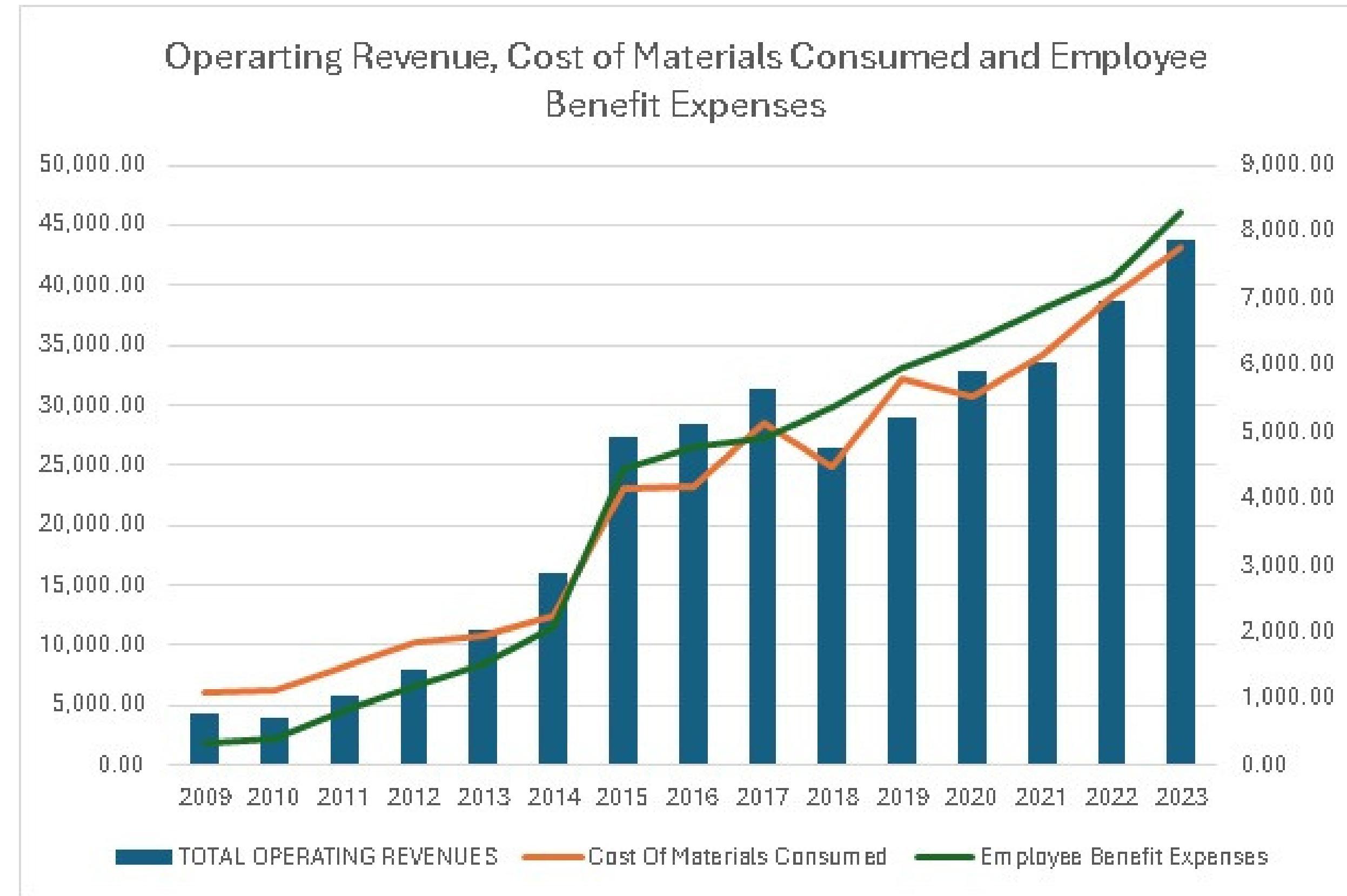
DU PONT ANALYSIS



CASH FLOW ANALYSIS



COST BREAKDOWN





MARKETING OVERVIEW

JUBIN JOSEPH
(HEAD OF MARKETING)

WHERE WE STAND

#1

Pharmaceutical
company in India

4th

Largest specialty generics
pharmaceutical company
globally

100+

Countries market
reach

43

Global manufacturing sites

Among the
Largest

8th

Largest generic
pharmaceutical
company in the US

38,000+

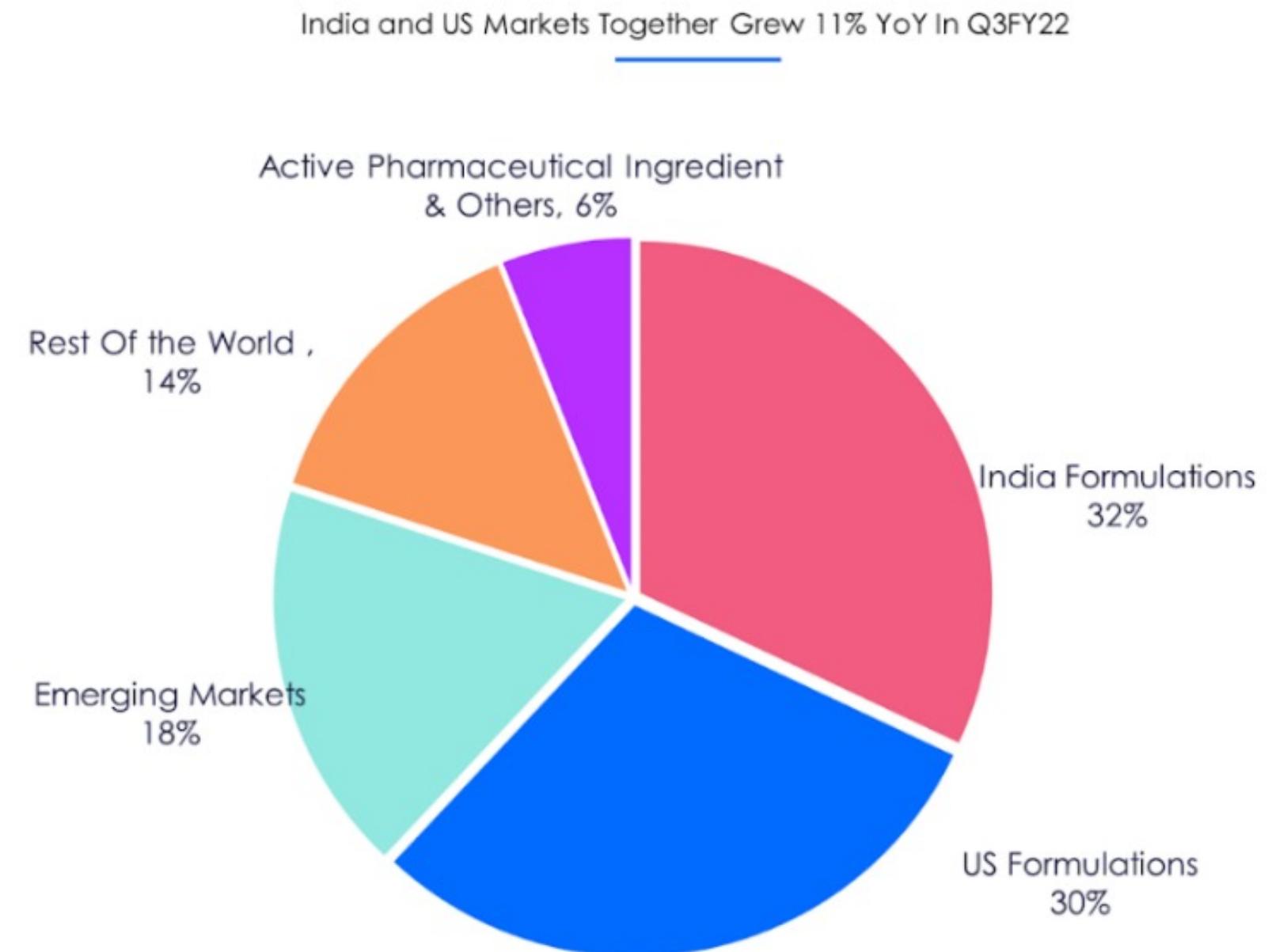
Global employee strength

50+

Employee
nationalities

MAJOR MARKETS

India And US Markets Dominate Sun Pharma's Revenue Mix In Q3FY22





OUR BUSINESS MODEL

Chart 10 India Business Therapeutic Revenue Break-Up⁵

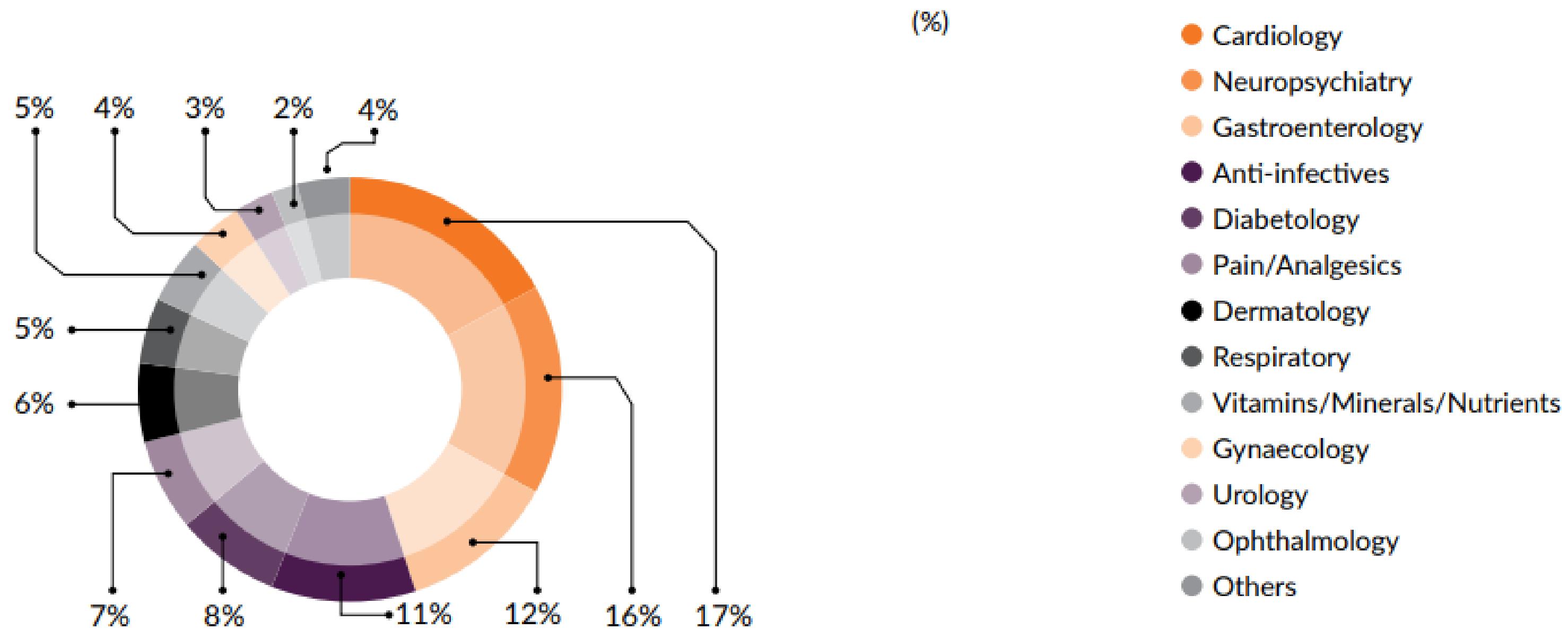
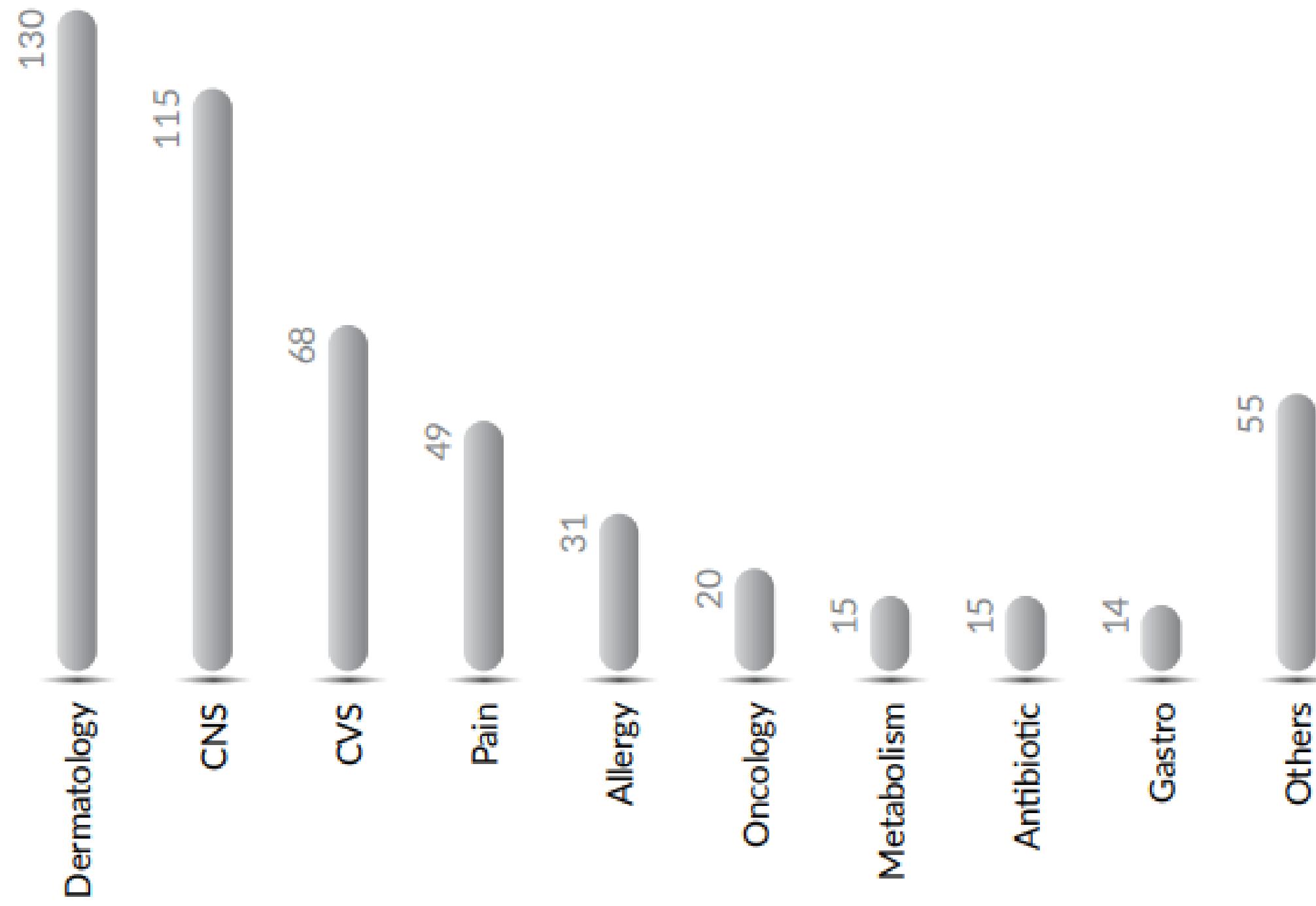


Chart 8

Cumulative ANDA Approvals by Therapeutic Areas as of March 31, 2022

(Nos.)



**APPROVALS
RECIEVED**

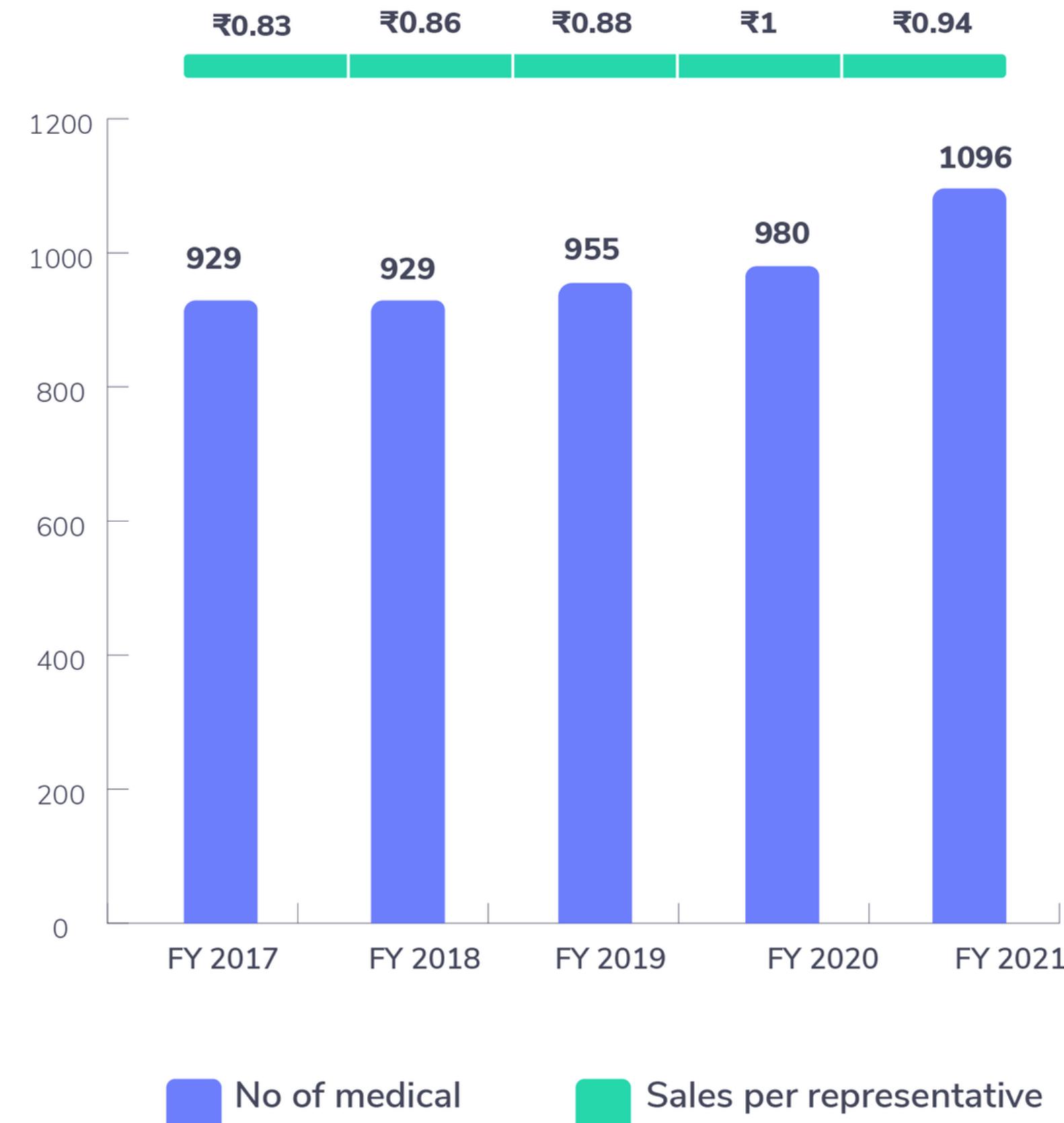
Specialty R&D Pipeline

Besides the ongoing research on pre-clinical candidates, Sun Pharma has a pipeline of four specialty molecules undergoing clinical trials:

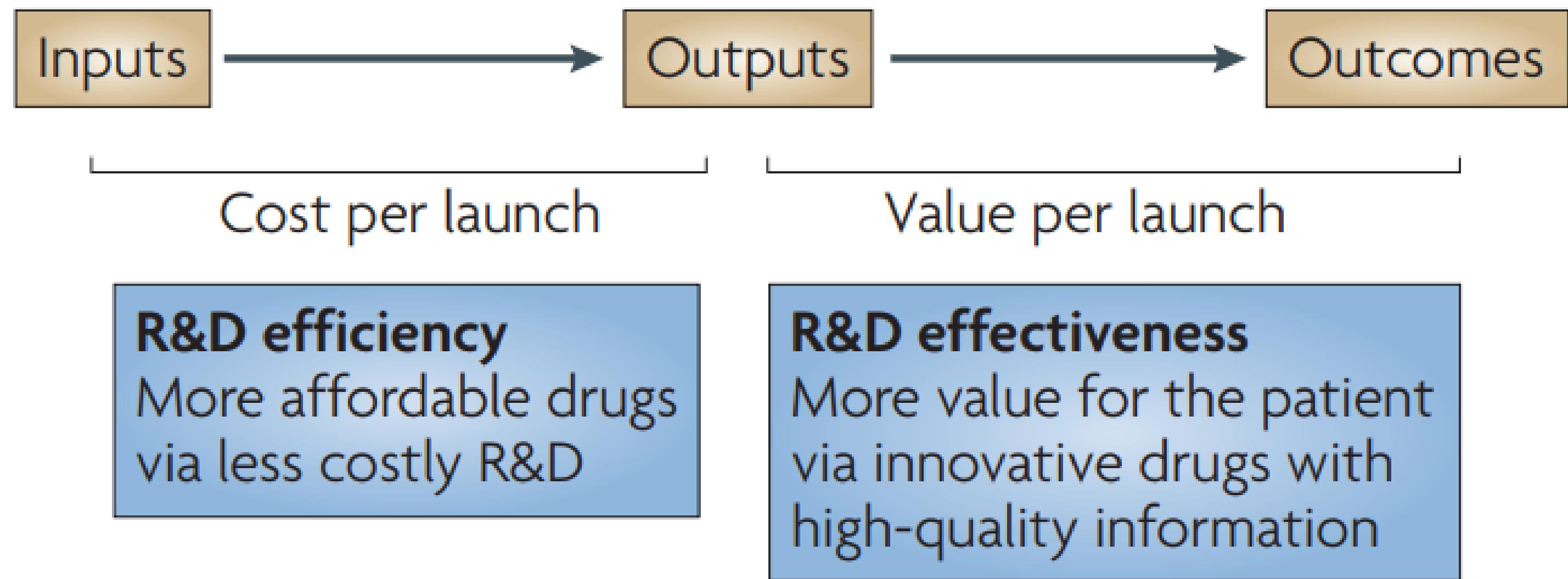
Table 8 **Sun Pharma - Specialty R&D Pipeline**

Molecule/Asset	Indication	Route of Administration	Mechanism of Action	Pre-clinical	Phase-1	Phase-2	Phase-3	Registration	Approved
Illumya (tildrakizumab)	Psoriatic Arthritis	Injection	IL-23 Antagonist	<div style="width: 100%; background-color: #ff9933;"></div>					
SCD-044	Psoriasis Atopic Dermatitis	Oral	Selective SIPR1 Agonist	<div style="width: 100%; background-color: #ff9933;"></div>					
MM-II	Treatment of pain in osteoarthritis	Injection	Liposomal intra-articular lubrication	<div style="width: 100%; background-color: #ff9933;"></div>					
GL0034	Type 2 Diabetes	Injection	GLP-1R Agonist	<div style="width: 100%; background-color: #ff9933;"></div>					

MEDICAL AND SALES REPRESENTATIVE



OUR VALUE CHAIN



DEFINING R&D PRODUCTIVITY

The amount of scientific and clinical research being conducted simultaneously, designated here as the work in process (**WIP**)

$$P_a = \frac{WIP \times p(TS) \times V}{CT \times C}$$

The probability of technical success (**p(TS)**)

The value proposition of the study (**V**)

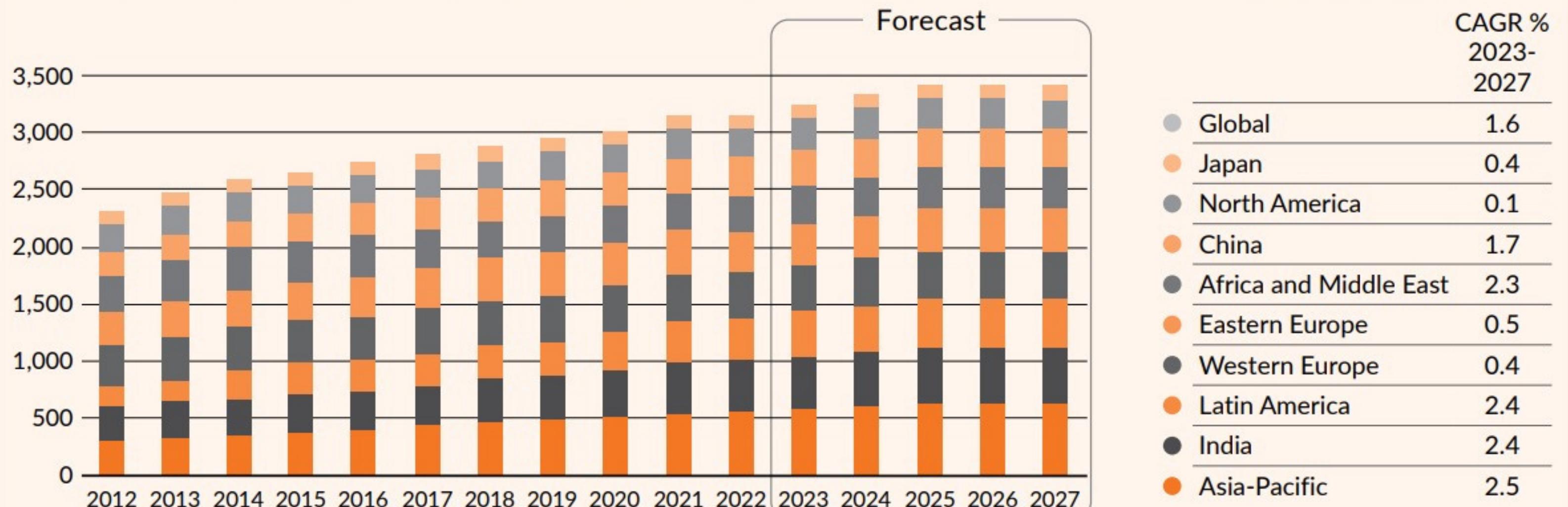
Cycle Time of the R&D Process (**CT**)

Cost of the R&D Process (**C**)

Steven M. Pau (2010)

Global Pharmaceutical Industry Growth: 2018-2027¹

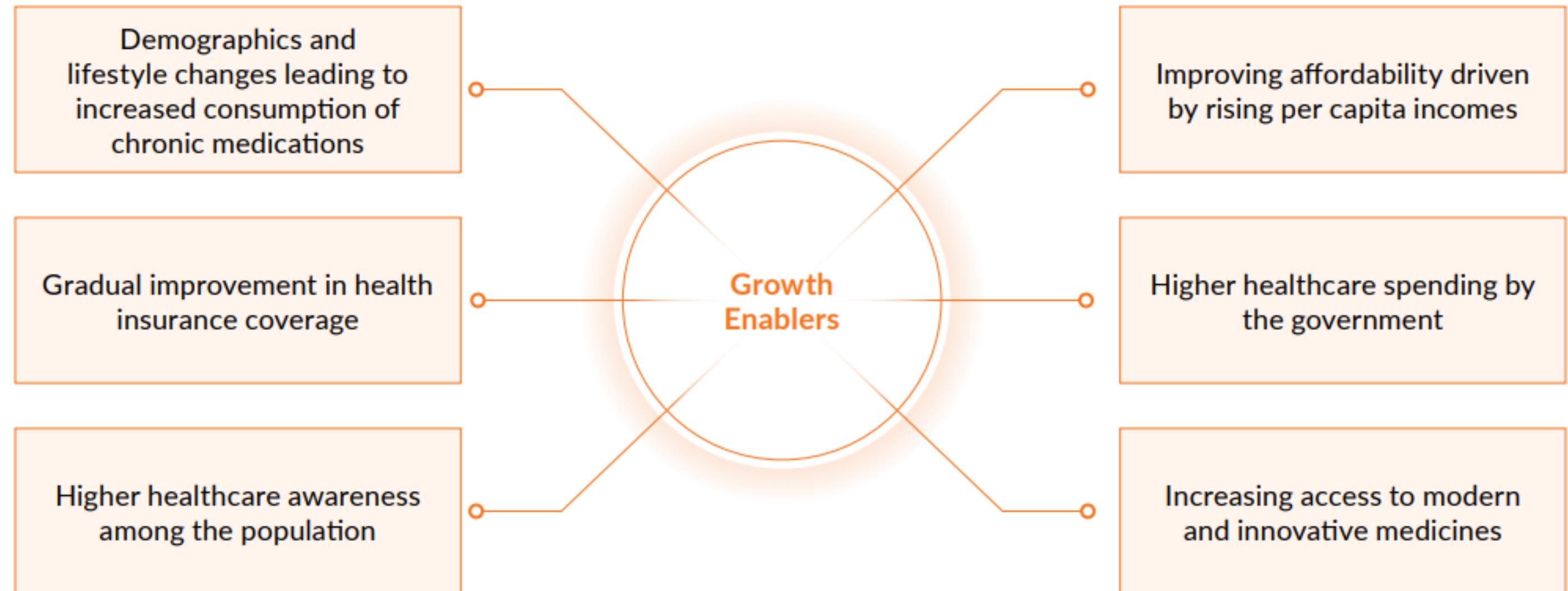
(Defined Daily Doses in Billions)



Source: IQVIA Market Prognosis, September 2022; IQVIA Institute, December 2022.

** Includes Argentina, Bangladesh, Brazil, Chile, China, Colombia, Egypt, Hungary, India, Indonesia, Mexico, Pakistan, Philippines, Poland, Romania, Russia, Saudi Arabia, South Africa, Taiwan, Turkey, Ukraine, and Vietnam.

UPCOMING TRENDS





CSR OVERVIEW

**DEEEPANSHI GUPTA
(HEAD OF CSR)**



THANK YOU