



Narayana Health

Changing the
face of Healthcare



Narayana Health - A Pan-India Multispecialty Hospital Group



2000 Year founded by Dr Devi Prasad Shetty



50⁽¹⁾ Healthcare facilities (24 Hospitals, 7 Heart Centres, 19 Primary Care Facilities)



19 Cities in India and 1 in Cayman Islands



2.6⁽²⁾ Patients annually (in millions)



30+ Medical specialties



343⁽²⁾ Daily average surgeries and procedures



14953⁽³⁾ Full-time employees and students



3229⁽³⁾ Full-time, consultant and student doctors

(1) Includes Hospitals, Heart Centres, Clinics and Information centres

(2) During FY'17

(3) During FY'17



“A solution is not a solution unless it is affordable.”

At NH, we are convinced that Quality and Affordability are not mutually exclusive when it comes to healthcare delivery.

We are committed to creating an affordable, globally-benchmarked, quality-driven healthcare services model.

Dr. Devi Prasad Shetty

Founder & Chairman, Narayana Health



Recognition for Chairman Dr. Devi Shetty



- 2015 Dr. Ida S. Scudder Humanitarian Oration
- 2014 19th Nikkei Asia Prize
Economic & Business Innovation
- 2013 Entrepreneur of the Year at ET Awards
- 2012 Indian of the Year by CNN-IBN
- 2012 Lifetime Achievement Award by FICCI
- 2012 The Economic Times Entrepreneur of the Year
- 2012 EY Entrepreneur of the Year India
- 2012 Padma Bhushan
- 2011 The President's award by the American
College of Cardiology
- 2011 The Economist's Innovation Awards
- 2010 Indian of the Year by NDTV
- 2010 Commendation for driving affordable and
quality healthcare-ICICI Lombard & CNBC TV18
- 2005 Social Entrepreneurship Award
- 2004 Citizen Extraordinaire, Rotary
- 2004 Dr. B C Roy Award
- 2003 Padma Shri
- 2003 Ernst & Young – Entrepreneur of the Year
- 2003 Sir M. Visvesvaraya Memorial Award
- 2002 Rajyotsava Award



Positioned to serve a billion people

Pan India Footprint

24 multispecialty and super-speciality facilities

7 super-speciality heart centres contained within third-party hospitals

19 primary care facilities, including clinics and information centres

5889⁽¹⁾ operational beds

3 JCI accredited hospitals

14 NABH accredited hospitals



NH's Flagship Hospitals



NICS, Bangalore



- Center of Excellence in Cardiac Sciences – Cardiac surgery and Cardiology

MSMC, Bangalore



- Multispeciality tertiary care hospital focused on cancer care, neurology and neurosurgery, nephrology, and urology
- Houses one of the largest bone marrow transplant units in India

RTIICS, Kolkata



- Cardiac Sciences, Renal Sciences (including Kidney Transplant) Neurosciences and Gastroenterology



The NH Way



1

Unique business model aligned with industry dynamics

Affordable healthcare at highest clinical standards

2

Recognised brand for clinical excellence

Strong brand equity and goodwill among patients and healthcare professionals



3

Experienced management team

Proven execution track-record and distinctive operating culture

4

High growth & multiple layers of growth and profitability drivers

Track-record of robust operational and financial performance



Highly Efficient Model of Capital Deployment



Average effective capital cost per bed is one of the most competitive in the Industry⁽¹⁾

“Asset-Right Model” – partners can own the fixed assets and NH owns the medical equipment and operates and manages the hospital

Greenfield and acquisition-led expansion;

Preferred partner for governments owing to scale, track-record, and ethos of high quality affordable care

Invest in offering high quality, efficient care and **expanding the range** of healthcare service

(1)Based on $(\text{Gross Block for Fixed Assets (adjusted for non-cash government grant provision)} + \text{Capital Work in Progress (CWIP)}) / \text{Number of operational beds}$ as of 30 Sep 2016. Excludes Managed Hospitals and Cayman facility



The NH Way: Operational Excellence

Teleradiology

- 24/7 radiology support for all NH network hospitals from Bangalore Health City
 - Sub speciality teleradiology
 - Radiology Locum support
- Total reporting across the group : 1800-2000 per day





The NH Way: Workforce

Academic Excellence

Programmes Offered

- 56** PG programs for Doctors
- 55** NH certified training programmes
- 37** Programs for Nursing and Para-medical professionals
- 1945** Students/trainees at any given time





The NH Way: Technology

Telemedicine: Reaching out to the grassroots



150

Telemedicine centers
- a pioneering effort



711

Tele-ECG
network



55,000

cardiac patients
treated free



11,500

patients treated
in various CCUs



63

locations in Africa
& other countries





The NH Way: Corporate Social Responsibility

Yeshaswini micro health insurance scheme



Unaffordability can be tackled when united



Launched in 2003 by Government of Karnataka



World's largest self-funded microhealth insurance



Covers over 1600 surgeries



Premium is Rs. 25 per person per month



Replicated by 2 other states



Caters to 4 million people



Case Study by HBS



WHAT MAKES US DIFFERENT ?

30+

Medical Specialities

343* daily
average surgeries &
procedures

covered under over **20**
International Insurance Schemes

Patients from more than
76 countries

One of the largest dialysis units in India &
performs **2,00,000** dialysis per year (FY '16-'17)

Treats more than **2 Million**
Patients annually (FY '16-'17)

CENTRES OF EXCELLENCE



Cardiac
Sciences



Oncology



Orthopaedics



Robotic
Surgery



Neuro
Sciences



Gastroenterology



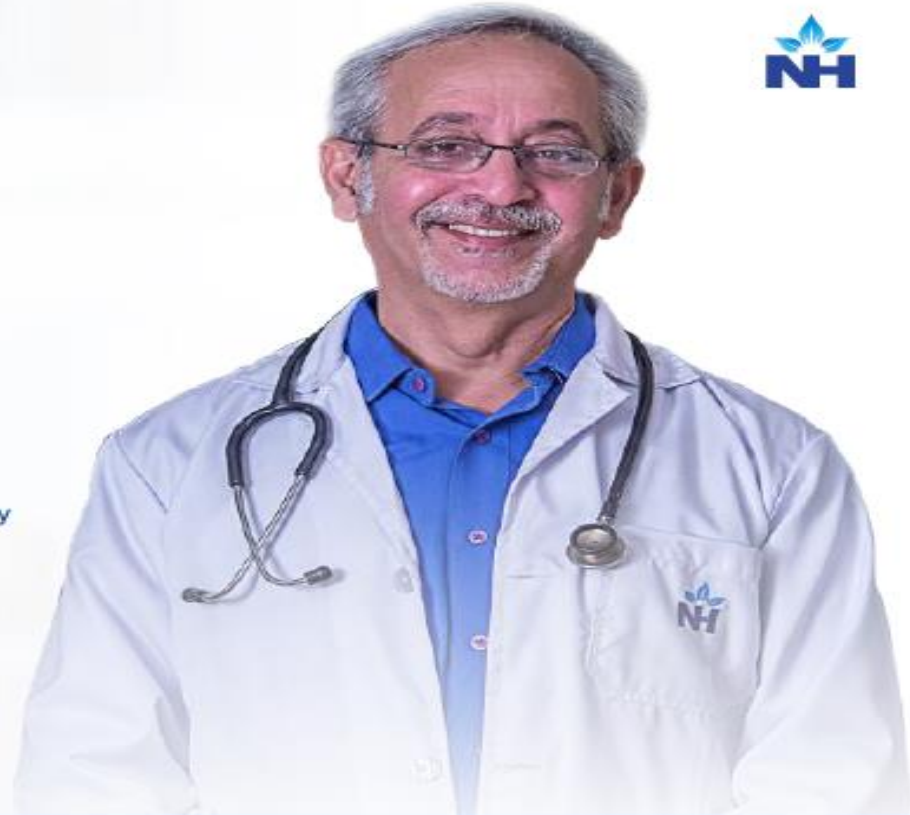
Nephrology



Gynaecology



Urology





A Typical Day at NH

534 Inpatient
Admissions

131 Surgeries
All together

39 Cardiac
Surgeries

4477 Outpatients

141 Cath
Procedures

513 Dialysis
Procedures

2 Kidney
Transplants



International PATIENT SERVICES

PRE-ARRIVAL

- Medical opinion & Treatment Plan
- Visa Assistance
- Travel Arrangements



DURING TREATMENT

- Accommodation
- Assistance during Treatment
- Embassy & Legal assistance
- International Cuisine & Amenities
- Forex & Translation services



POST TREATMENT

- Leisure Services
- Post-treatment Care



Concierge services for International Patients



- Complimentary Airport Pickup and drop.
- 24x7 services for online medical enquiries.
- Direct interaction with doctors over teleconference, Skype etc., for second opinion.
- Assistance in Local SIM Cards
- Local accommodation starting from as low as USD 10 / Per night.
- Assistance in Local and outstation travel.
- Friendly, Warm and Welcoming culture in India.



Recover in Comfort at The Platinum Wing, NH Health City



**Platinum Care | Dedicated Medical Team |
Customized | Fully Furnished Rooms | International
Television & Wi-Fi | Concierge Desk**



ALLIANCE PARTNERS

- Aetna Global Benefits (Middle East) LLC
- Axa Insurance (Gulf) B.S.C ©
- Cigna Global Health Benefits (CGHB)
- Europ Assistance India Private Limited
- Vanbreda International NV
- International SOS
- Star Well Destination
- Alliance Global Assistance USA
- Mondial Assistance USA



Awards & Accolades



2017

Narayana Health listed in **India's Top 500 Companies 2017 by Dun & Bradstreet**

Most Innovative Citizen Engagement through Technology

- BW Businessworld Digital India Award

Narayana Health listed in **Fortune India Next 500 List of Companies**

Best Hospital in Jammu - SMVD

Narayana Superspecialty Hospital - BIG Jammu Pride Awards

Best Emerging Brand SRCC Children's

Hospital managed by Narayana Health - National Award for Marketing Excellence presented by Times Network

Best Single Speciality Hospital - Oncology - Dharamshila

Narayana Superspecialty Hospital - Times Healthcare Achievers Awards 2017

2016

Price/Performance Value Leadership Award

by Frost & Sullivan India.

Narayana Health listed in the Fortune

Next 500 List of Companies.

Best Risk Management Framework and Systems - Healthcare

by the 3rd edition of the ICICI Lombard - CNBC TV 18 India Risk Management Awards

Best Single Specialty Hospital-Cardiology

6th ICICI Lombard & CNBC-TV18 India Healthcare Awards - NICS awarded

Category Innovative Marketing Practices

Winner - Express Healthcare Excellence Awards.

Health Brand of the Year

Healthcare - India Health & Wellness Awards

Medical Tourism Brand of the Year

India Health & Wellness Awards

2014

Winner of Gold Award in the Customer Service

by Asian Hospital Management

Winner of ABP news Brand Excellence Award

Winner of Inc. India Innovative 100 Award

2014 BCG Local Dynamos -

Operational Excellence

India Health and Wellness Award-

Superspecialty Hospital

2015

WHO Public Champion Award

Category Innovation

Healthcare Leadership Awards - Stars of the Industry Group

Category Outstanding Achievement in Healthcare

Healthcare & Social Care Support

2013

Recipient of "Financial Times Arcelor Mittal Boldness in Business Awards"

Corporate Responsibility/ Environment category.

Porter Prize

for Industry Architectural Shift

Winner of Inc. India Innovative

100 Award

Philanthropy Award

Forbes India

2012

Ranked 36th among "World's 50 most innovative companies"

By Fast Company

Frost & Sullivan India Healthcare Excellence

Healthcare service provider company of the year

FICCI Health Care Excellence

Award for addressing Industry Issues

2010-11

Best Hospital

Award by CNBC & ICICI Lombard

India Shining Star CSR Award

For the exceptional CSR work done



Creating a buzz around the world



Articles, Case Studies & Books

The Wall Street Journal

BBC News

Harvard Business

The Guardian Weekly

Reader's Digest

Boston Consulting Group

Forbes News Scientist GEO Wissen

The Week Health

India Today

Wharton University of Pennsylvania

Television Media

Discovery Channel

American Broadcasting Company

The Biography Channel

CNBC

Al Jazeera

Executive Summary



1. Knowledge transfer through programs like Training of doctors, Nurses and Paramedic staff.
2. Capacity building – NH can help to run and manage Specialities / hospitals for local healthcare groups in Indonesia.
3. Telemedicine Services – Video Conference & Consultations.
4. Teleradiology and medical reporting services – electronic transfer of images of CT Scan, MRI Images, Ultrasound, X-ray's.
5. Working with Government Organisations, NGO's, Corporates, Insurance companies etc. for providing world class treatments at extremely subsidised costs
6. Treatment of referred patients at our network hospitals in India, across Cardiac, Neuro-Surgeries, Orthopaedic & Spine, Transplants (kidney, Bone marrow, Liver), Oncology etc.



 **NH** Narayana Health

www.narayanahealth.org



Thank You

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