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**

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

\(^{(1)}\) As on 1st Oct’17
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

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\(^{(1)}\)Based on (Gross Block for Fixed Assets (adjusted for non-cash government grant provision)+ Capital Work in Progress (CWIP)) / 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
- World's largest self-funded microhealth insurance
- Premium is Rs. 25 per person per month
- Caters to 4 million people

- Launched in 2003 by Government of Karnataka
- Covers over 1600 surgeries
- Replicated by 2 other states
- Case Study by HBS
WHAT MAKES US DIFFERENT?

30+ Medical Specialties

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

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<td></td>
<td>Narayana Health listed in <em>India’s Top 500 Companies 2017</em> by Dun &amp; Bradstreet</td>
<td>Narayana Health listed in <em>Fortune India Next 500 List of Companies</em></td>
<td>Price/Performance Value Leadership Award by Frost &amp; Sullivan India.</td>
<td>Winner of Gold Award in the Customer Service by Asian Hospital Management</td>
<td>Ranked 36th among “World’s 50 most innovative companies” By Fast Company</td>
<td>Best Hospital Award by CNBC &amp; ICICI Lombard</td>
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<td>Best Emerging Brand SRCC Children’s Hospital managed by Narayana Health - National Award for Marketing Excellence presented by Times Network</td>
<td>Best Single Specialty Hospital-Cardiology 6th ICICI Lombard &amp; CNBC-TV18 India Healthcare Awards - NIC 5 awarded</td>
<td>Best Single Specialty Hospital-Cardiology</td>
<td>Winner of ABP News Brand Excellence Award</td>
<td>2014 BCG Local Dynamos - Operational Excellence</td>
<td>FICCI Health Care Excellence Award for addressing Industry Issues</td>
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<td>Best Single Speciality Hospital - Oncology - Dharamshila Narayana Superspeciality Hospital - Times Healthcare Achievers Awards 2017</td>
<td>Category Innovative Marketing Practices</td>
<td>Health Brand of the Year Healthcare - India Health &amp; Wellness Awards</td>
<td>Winner of Inc. India Innovative 100 Award</td>
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<td>Whirlpool CSR Award</td>
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Creating a buzz around the world

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<tr>
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<th>Television Media</th>
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<tr>
<td>The Wall Street Journal</td>
<td>Discovery Channel</td>
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<tr>
<td>BBC News</td>
<td>American Broadcasting Company</td>
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<tr>
<td>Harvard Business</td>
<td>The Biography Channel</td>
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<td>The Guardian Weekly</td>
<td>CNBC</td>
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<td>Reader’s Digest</td>
<td>Al Jazeera</td>
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<td>Boston Consulting Group</td>
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<td>Forbes News Scientist GEO Wissen</td>
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<td>Wharton University of Pennsylvania</td>
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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.


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.
Thank You

amit.singhal@narayanahealth.org