



HealthCare Global Enterprises Limited

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HCG : Vision & Mission Statement



VISION

Adding life to years by redefining healthcare through global innovation.

MISSION

To be an acclaimed healthcare institution in pursuit of medical excellence through value-based medicine.

VALUES

Quality

Enabling patients to achieve better lives.

Integrity

We are honest, forthright and are responsible corporate citizens.

Collaboration

Limitless possibilities of collaborative energy and teamwork.

Innovation

Innovative ways to ensure better medical outcomes.

Leadership

We strive to be the best at what we do, both as a company and as individuals.

Our vision – Leadership in specialty care



Hope
For cancer patients

Joy
For infertile couples

Knowledge
through diagnostics,
technology and research

Our vision – Leadership in specialty care



Pioneer in field of oncology
focused on quality and outcomes
with Pan-India presence

Today's focus

21 comprehensive
cancer care center



Pioneer in field of reproductive
medicine in India

8 fertility centers
across India



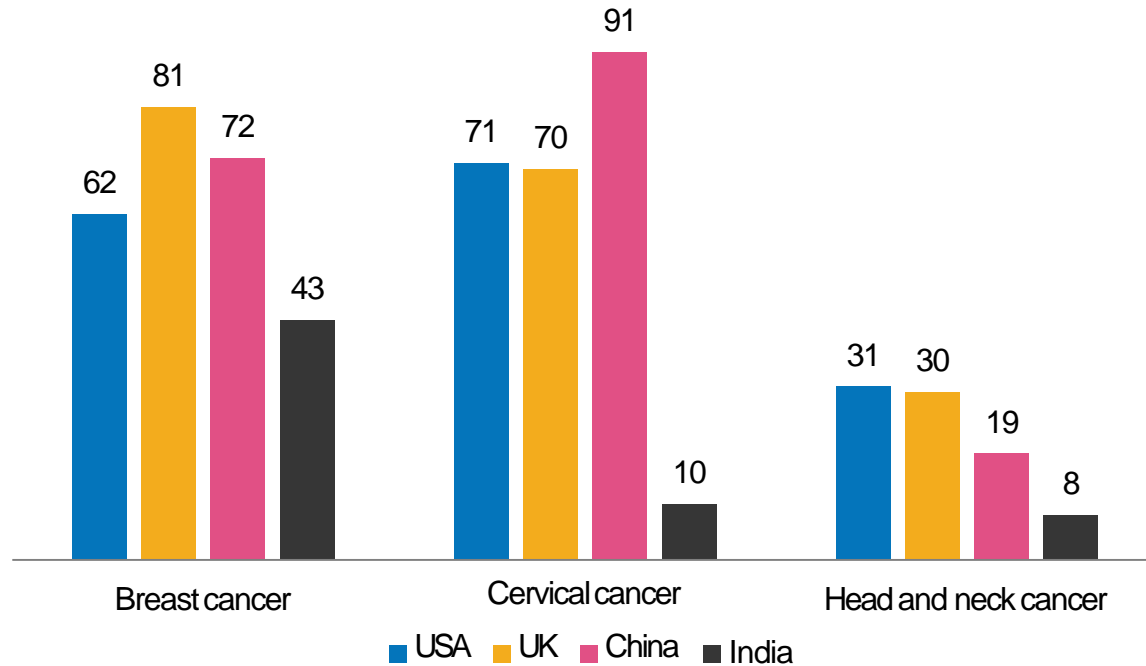
Pioneer in field of
Bioinformatics, molecular
testing precision diagnostics

20 high quality
laboratories across India

India faces a very low cancer detection rate at early stage

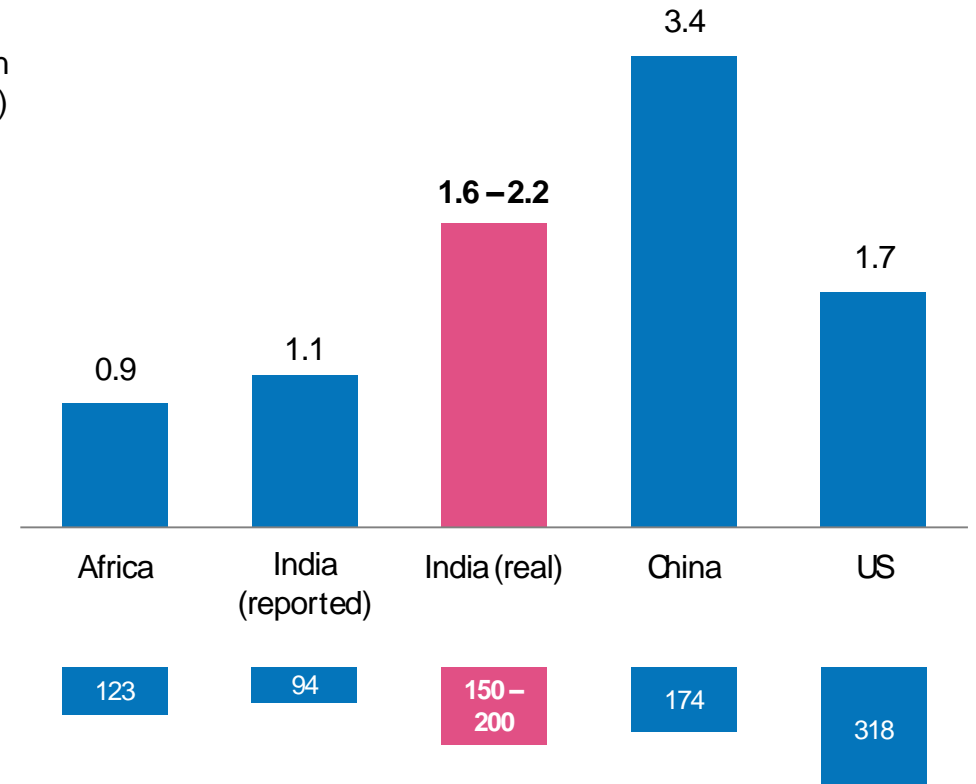
Under diagnosis of cancer in India

Cancer diagnosis at early stages (Stage I or II), in %



Incidence of cancer across countries

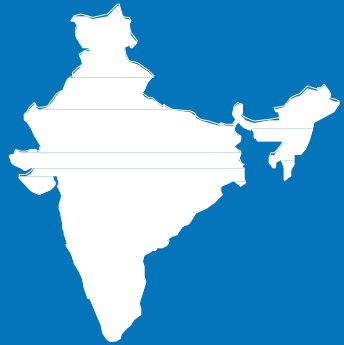
Estimated incidence of cancer in 2015 (in m)



¹ Age standardized rate (world)

Source: Ernst & Young (2017) *Call for Action: Expanding cancer care for women in India*

We are India's largest provider of cancer care in terms of # of centers, # of patients treated, revenue and presence



India (26 centers)

- 1 center of excellence
- 21 comprehensive cancer center
- 3 diagnostic center
- 1 day care chemotherapy center



World (6 countries)

- Africa (Kenya, Nigeria, Tanzania, Uganda)
- Asia (Iraq, Vietnam)



Treatment

- ~100k+ new cancer patient registrations (FY20E)
- 2,000+ advanced radiation therapy treatments



Research and education

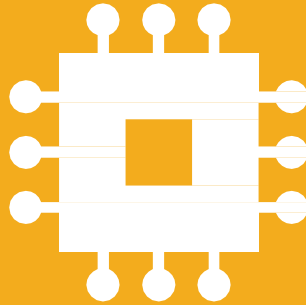
- 105 Students enrolled for HCGAcademics
- 40 Publications in FY19
- 28 Clinical Trials

How do we deliver high value care to billion patients

Access driving volume
(Hub-spoke model)



Digitalization



Compassion



Access driving volume (Hub-spoke model)



Hub – Center of excellence

Manages very complicated patient cases, virtual tumor boards and supports spokes with excellence.

Spokes – Cancer care center

Well equipped with imaging and therapy to avail cancer care close to patients' homes and omit travel.



Accessibility

From metros to tier II – III cities



Availability

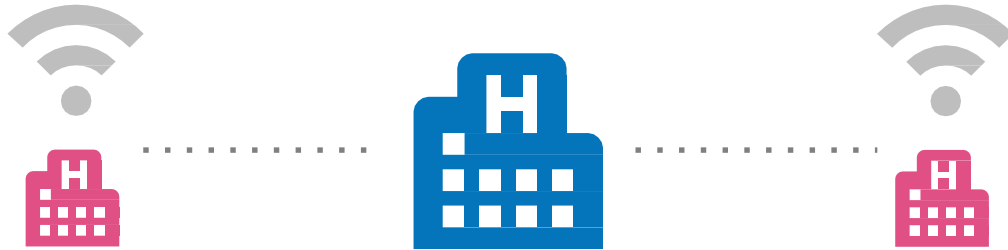
High concentration leads to steady utilization



Affordability

Nearby service incur stay and food and avoid loss of income

Digitalization drives availability of specialists and workforce productivity



Telemedicine

Remote consultations with specialists

Teleradiology

Centralized reading and reporting of images

Telephysics

Centralized physicist services



Accessibility

Spokes have access to hub doctors and expertise



Availability

24h service



Affordability

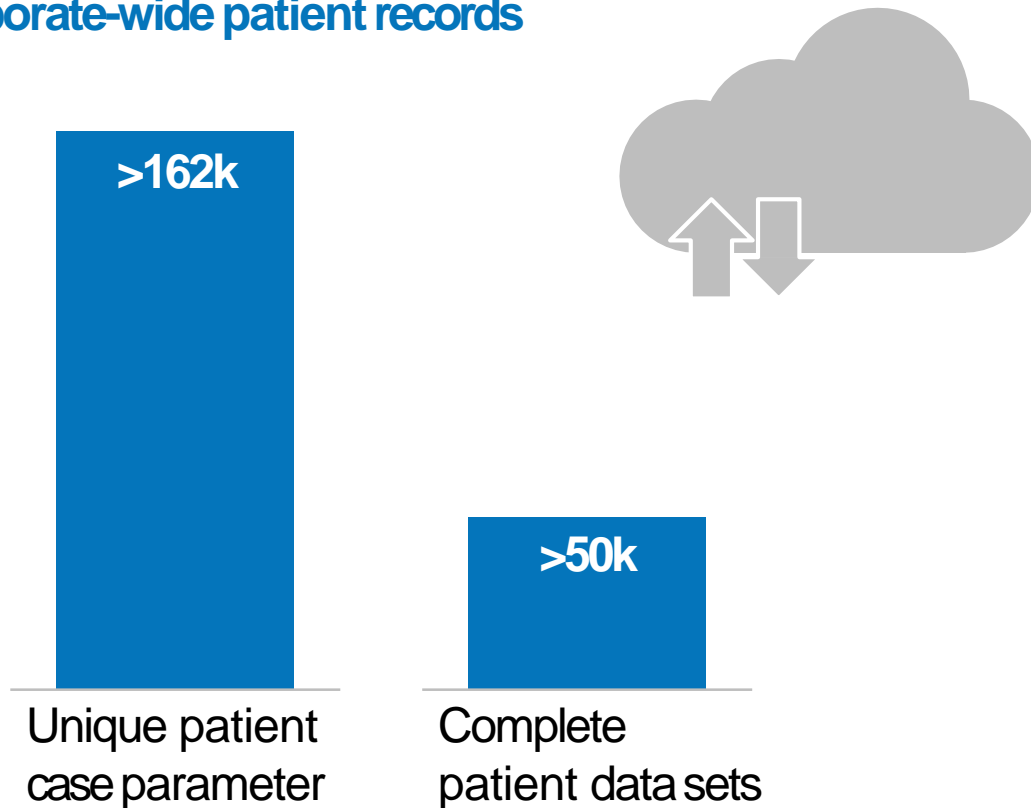
Cost saving through centralization of resources

Digitalization drives accurate therapy selection



Digitalization ensures high value care with improved quality and outcomes

Corporate-wide patient records



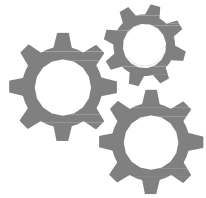
Improving precision
medicine in both,

diagnosis and treatment

for better patient
outcomes

To be continued ...

From anonymous care ...



Cancer treatment is more and more technology driven



Doctor-patient interaction typically only 5 (!) minutes



...to care with compassion



Compassion supported by training, monitoring, role-modeling (including top management)



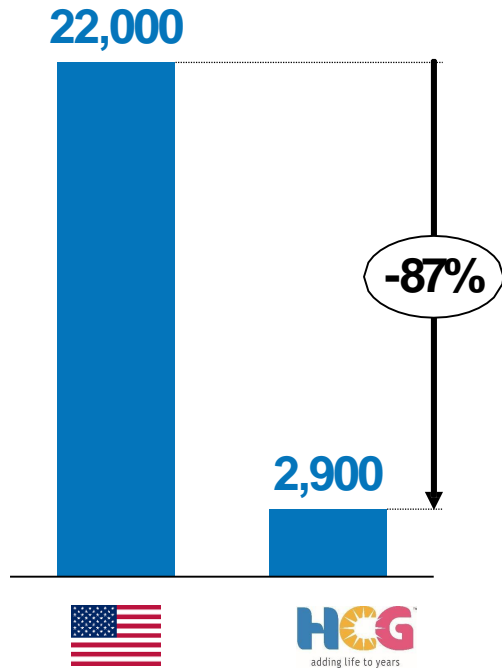
Become the very individual physician – as if there was no other patient



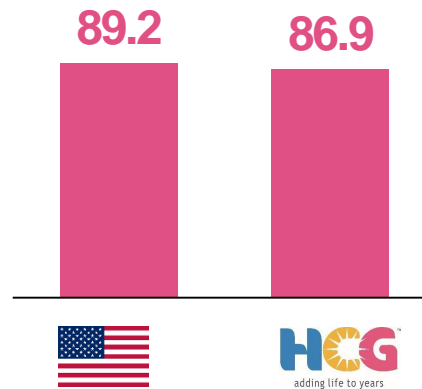
Treat as if the patient was your sister/ brother

Financial and clinical outcomes

Indian hospitals' ultralow costs¹ Cancer treatment in USD



Indian hospitals' high quality² Breast cancer survival rates in %



“At the level of patients' health, the available evidence suggests that **HCG** has made an important contribution towards improving the quantity and quality of health outcomes.”

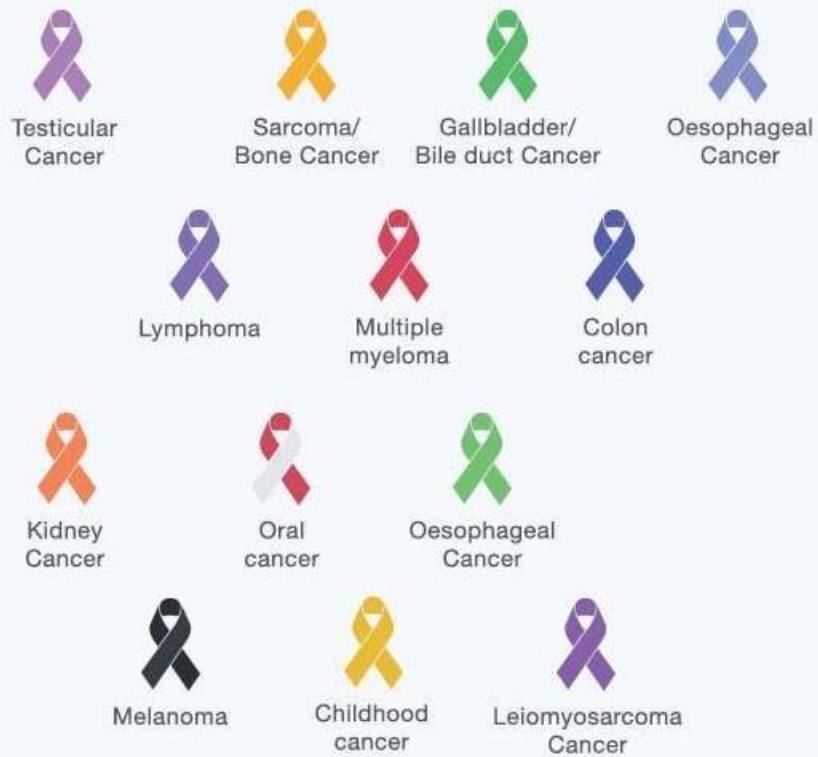
“The quality indicators suggest that **experienced quality of care is high at HCG, higher than some global comparators** including the UK National Health Services hospitals.”

¹ HCG/Costs are for a full set of intensity-modulated radiation treatments

² HCG, SEER database 5-year survival rate for breast cancer, stages 1 – 3 combined

Source: Harvard Business Review, 2013, Delivering World-Class Health Care, Affordably; SEO Amsterdam Economics & International Finance Corporation, forthcoming

World class treatment for all types of cancer in our network of cancer care



-  Center of Excellence (1)
-  Comprehensive Cancer Center (21)
-  — under development (3)
-  Day Care Chemotherapy Center (1)
-  Freestanding Diagnostic Center (3)