

May 24, 2023

National Stock Exchange of India Limited
Exchange Plaza, 5th Floor, Plot No. C/1,
G-Block, Bandra Kurla Complex,
Bandra (E), Mumbai – 400051.

Stock Symbol: JBCHEPHARM

Dear Sir,

Sub: Company Presentation

Enclosed is Company's presentation on financial results for the quarter and year ended on March 31, 2023. The Company proposes to make/circulate this presentation to the investors/analysts.

Kindly take the same on record.

Thanking you,

Yours faithfully,

For J. B. Chemicals & Pharmaceuticals Limited

Sandeep Phadnis
Vice President – Secretarial
& Company Secretary

Encl: As above

Registered Office:

J.B. Chemicals & Pharmaceuticals Limited,
CIN: L24390MH1976PLC019380
Neelam Centre, 'B' Wing, 4th Floor, Hind Cycle Road,
Worli, Mumbai – 400030, T:+91 22 24822222

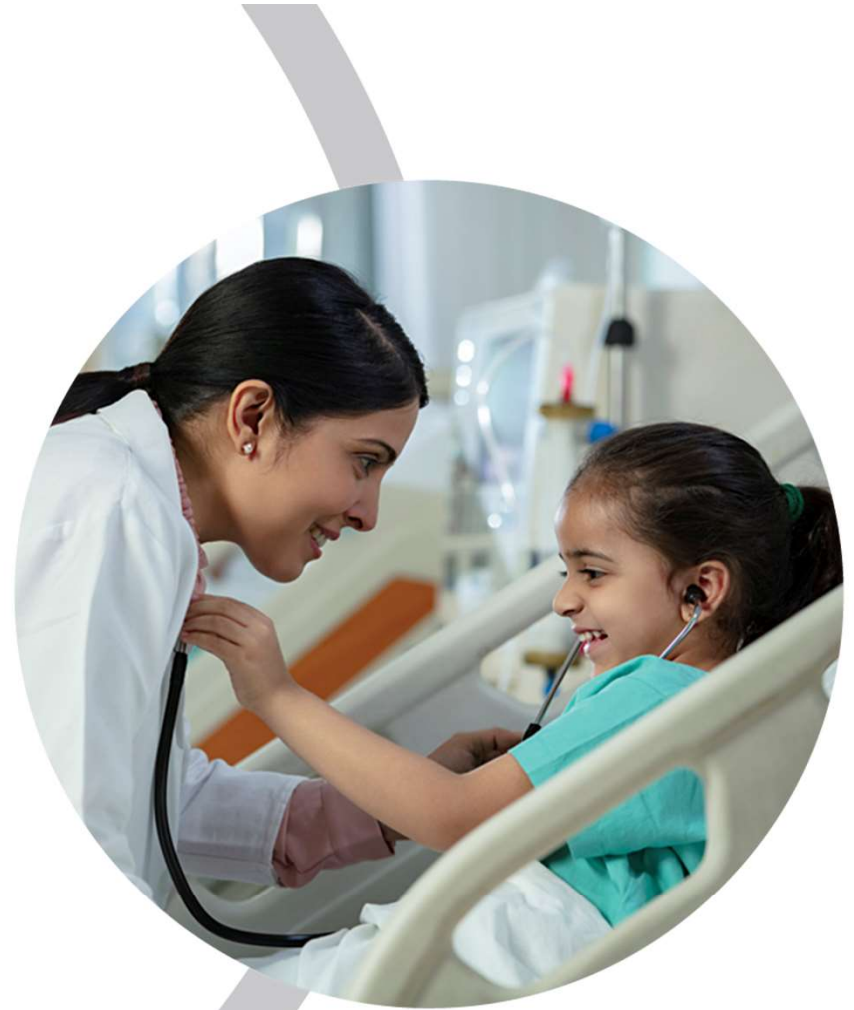
Corporate Office:

J.B. Chemicals & Pharmaceuticals Limited,
CIN: L24390MH1976PLC019380
Cnergy IT Park, Unit A, 8th Floor, Appa Saheb Marathe Marg,
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JB Pharma – Q4 and FY23 Investor Presentation

May 24, 2023



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GOOD PEOPLE
for GOOD HEALTH

Synergistic acquisitions

Peak productivity

Domestic outperformer

State of the art facilities

Focused markets

RU, CIS, & SA

ESG benchmarked

Dosage forms

GI leader

State of the art facilities

Leadership

Pillar Brands

OROS

Dosage forms

Cardiac leader

Market-beating

Specialty probiotics leader

Focused markets

RU, CIS, & SA

Dosage forms

GI leader

ESG benchmarked

Leadership

JB PHARMA

Consistency of delivery

Market-beating

Cardiac leader

Global regulatory approvals

Key therapies

Strong FCF

ESG benchmarked

Medicated/Herbal lozenges

Pillar Brands

Specialty probiotics leader

OROS

Market-beating

Global regulatory approvals

GI leader

Realigned GTM

ESG benchmarked

Cardiac leader

GI leader

Focused markets

RU, CIS, & SA

Synergistic acquisitions

Strong FCF

Leadership

Dosage forms

GI leader

Specialty probiotics leader

Medicated/Herbal lozenges

State of the art facilities

GI leader



46

Years of operations with consistent track record across multiple businesses

6

Brands among top 300 brands (IQVIA MAT Mar'23 data), contributing over 60% of domestic formulations revenues

40+

Regulated/semi-regulated markets of presence through direct operations and distributors

Top 5

Global manufacturer of medicated/herbal lozenges representing a substantial opportunity

26%

Growth in chronic therapies* in the domestic formulations business

2500+

Strong India field force# with therapy-focused segmentation

8

Multi-dosage formulation plants with key global approvals/ compliances

21%

Strong ROCE** with consistent cash flow generation

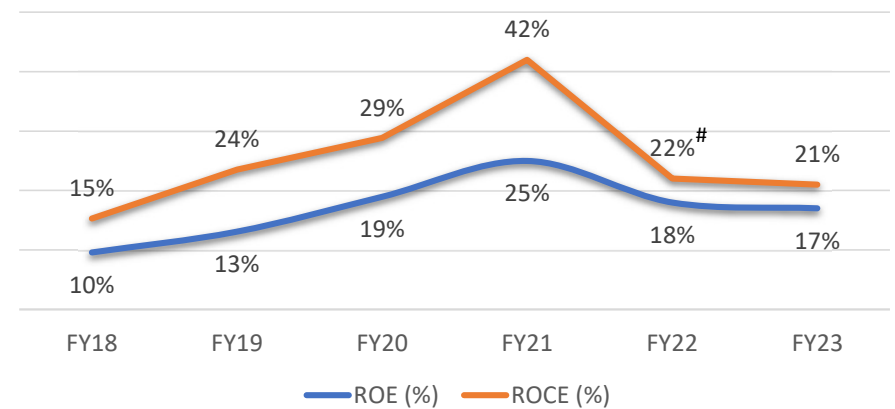
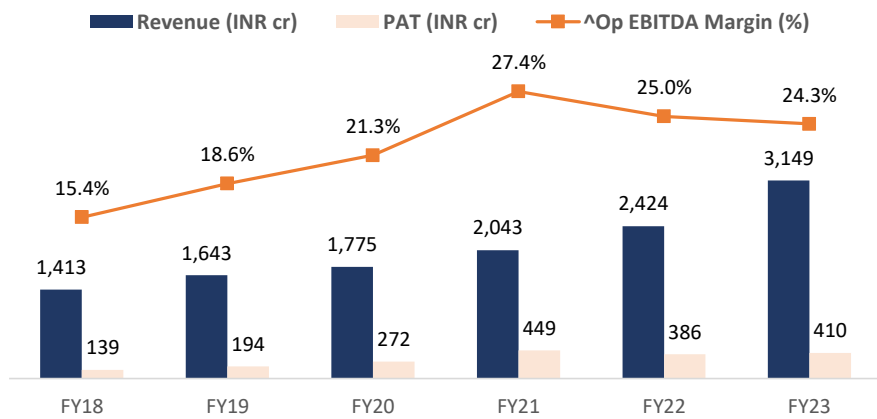
* CAGR over FY21-FY23 (IQVIA MAT Mar Nos)

#Includes MR and Supervisors

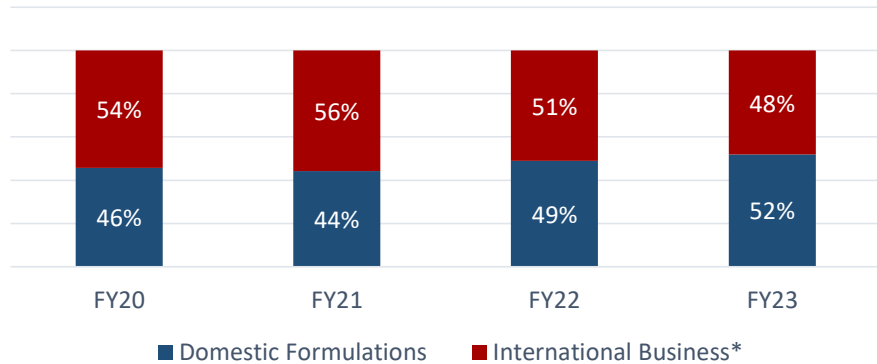
** ROCE for FY23 - $ROCE = EBIT / (Net\ Worth + Net\ Debt - Mutual\ Fund\ Investments)$



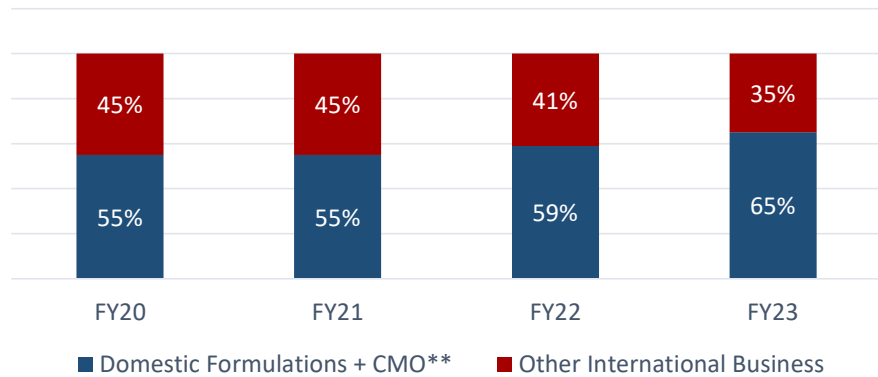
Corporate Snapshot – Financial Overview



Increasing Share of the Domestic Revenue



Increasing share of Domestic Formulations and CMO** in the total business



^Operating EBITDA is after excluding non-cash ESOP Charge

*International business=International Formulations + CMO + API

#ROCE impacted due to investments in acquisition

**CMO= Contract Manufacturing Business

World Class Manufacturing Facilities



8

- State of the Art manufacturing facilities



40+

- Global Regulatory Accreditations



10

- Dosage forms produced



TABLETS



CAPSULES



LIQUIDS



IV INFUSIONS



AMPOULES



VIALS



OINTMENTS



COLD RUBS



LOZENGES



SIPS



Q4 and FY23 Business Performance

CEO's Message



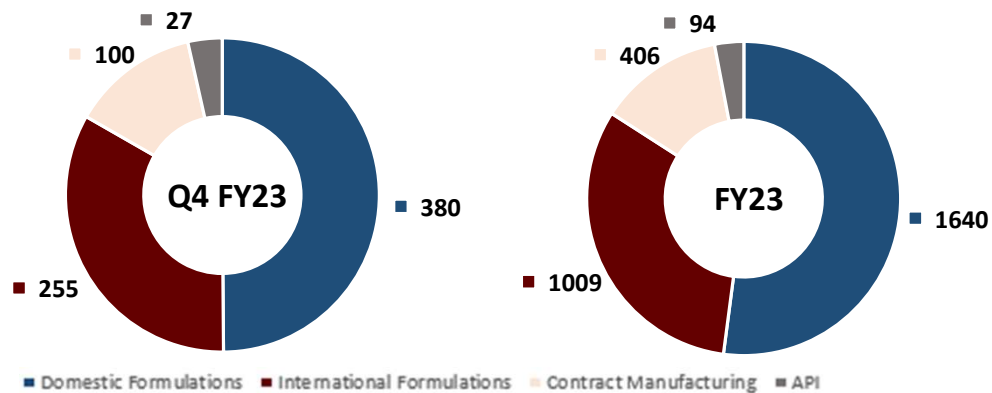
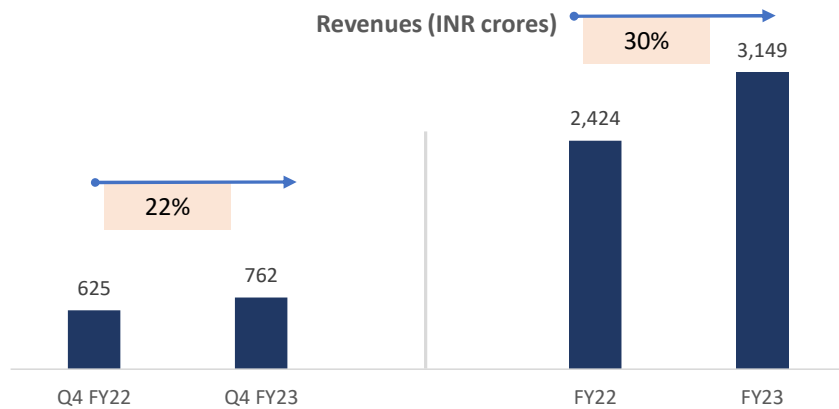
- **Nikhil Chopra, CEO & Whole Time Director**
- *Views on Q4 and FY23 business performance*

“JB continued its growth journey in the fourth quarter, thereby ending FY23 with strong performance across business segments. Our market-beating performance in India is pivoted around big brands becoming bigger, and significant demand acceleration in the acquired portfolio. Each of our top 5 brands have ascended through the ranks. Further, Azmarda entered IQVIA’s Top 300 brands list and other acquired business in probiotics and paediatric segment have witnessed rank and market share gain.

Our performance in the International business has seen commendable gains amidst a challenging business environment. International formulations clocked mid-teens growth for the quarter. We continue to witness increased interest from existing and new clients in the CMO business especially in the lozenges segment. We expect to build on this growth in the long term by expanding our pipeline for international business.

While we are cautious of the inflationary environment our efforts are aimed at executing well, with productivity and cost optimization as drivers, in order to deliver improved operating margins”

Results Overview: Q4 and FY23



- JB maintained its growth momentum in Q4 and closed the year with INR 3,000+ crores of revenue
 - Quarterly revenue was INR 762 crores recording growth of 22%
 - Revenue for FY23 grew by 30% to INR 3149 crores
- Domestic formulations business clocked revenue of INR 380 crores recording growth of 29% for the quarter and was at INR 1640 crores for FY23 with growth of 38%
 - Excluding acquired brands*, domestic business grew in double-digits for the quarter and mid-teens for the year
- International business performed well and grew at 16% to INR 382 crores in the quarter and 22% to INR 1509 crores for the financial year
 - CMO business closed the year with INR 400+ crores revenue maintaining its INR 100 crores quarterly revenue run rate

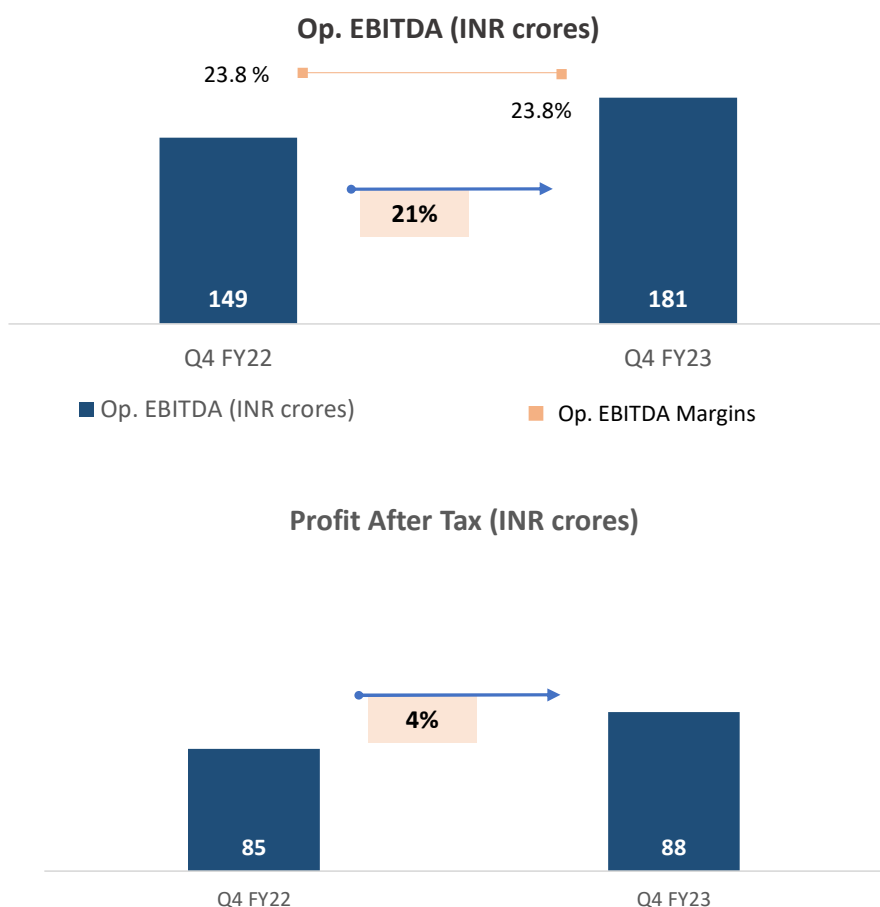
*Acquired brands includes Sanzyme brands, Azmarda, Paedia Brands and Razel



EBITDA Analysis - Q4 and FY23

INR crore	Q4 FY23	Q4 FY22	FY23	FY22	
Revenue	762	625	3149	2424	
Reported EBITDA	164	125	696	543	
Non Cash ESOP Charge	17	24	69	62	Included in Employee Benefits expense
Operating EBITDA (excluding ESOP charge)	181	149	765	605	
Operating EBITDA margins	23.8%	23.8%	24.3%	24.9%	

Financial Overview Q4 FY23



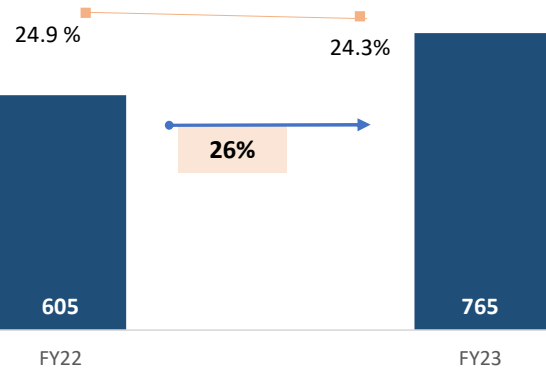
- Operating EBITDA* grew by 21% in Q4 FY23 to INR 181 crores vs INR 149 crores in Q4 FY22
- Gross margins were 63.9% in Q4 FY23 vs 65.9% in Q4 FY22
 - Sequential improvement from 62.3% in Q3 FY23
- Total employee cost incl ESOP charge as a percentage to sales improved to 17.8% in Q4 FY23 vs 18.6% in Q4 FY22
- Non-cash ESOP cost as a percentage to reported EBITDA was 10.4% in Q4 FY23 as compared to 19.2% in Q4 FY22
- Other expenses as a percentage to sales improved to 24.7% in Q4 FY23 vs 27.4% in Q4 FY22
- Depreciation includes amortization charge of INR 14 crores on account of acquired brands
- Finance costs increased to INR 14 crores for the quarter primarily due to term loan for brand acquisitions
- PAT improved to INR 88 crores in Q4 FY23, an improvement of 4%

*Operating EBITDA is after excluding non-cash ESOP Charge

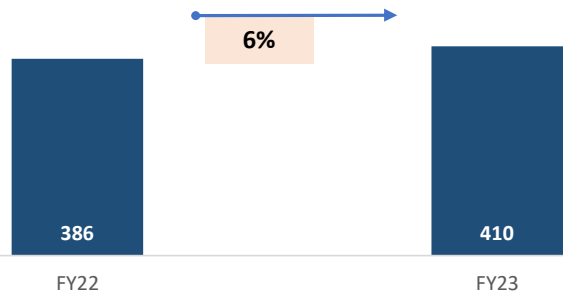
Financial Overview FY23



Op. EBITDA* (INR crores)



Profit After Tax (INR crores)



*Operating EBITDA is after excluding non-cash ESOP Charge

- Operating EBITDA* increased to INR 765 crores in FY23 vs INR 605 crores in FY22, an improvement of 26%
 - Operating margins were at 24.3% vs 24.9% in FY22
- Gross margins were at 62.9% for FY23 as compared to 65.2% in FY22
 - Gross margins were impacted due to cost inflation and higher Azmarda sales during exclusivity.
- Total employee cost incl. ESOP charge as a percentage to revenue improved to 17.2% in FY23 vs 18.1% in FY22
- Non-cash ESOP cost as a percentage to reported EBITDA was at 9.9% in FY23 as compared to 11.4% in FY22
- Other expenses as a percentage to sales was 23.6% in FY23 as compared to 24.7% in FY22
- Depreciation excluding amortization has increased marginally. Amortization charge on acquired brands was at INR 46 crores for FY23
- Tax rate for FY23 was 26% vs 24% in FY22
- PAT growth was 6% to INR 410 crores in FY23



Balance Sheet FY23 – Significant cash generation

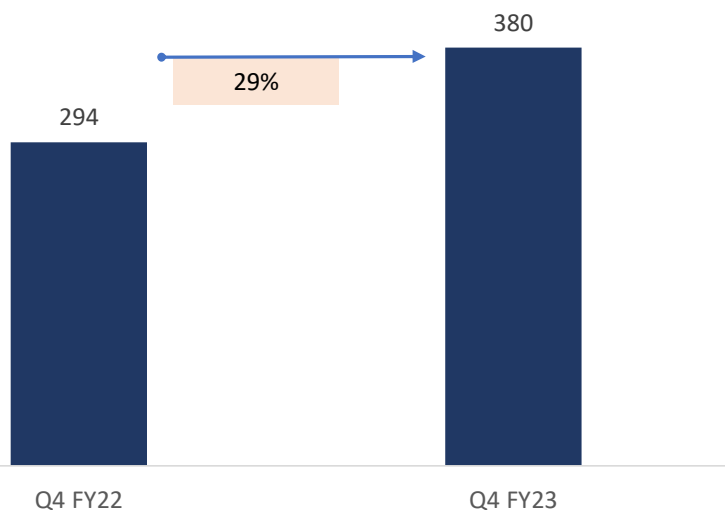
Balance Sheet (INR Cr)	Mar-23	Mar-22
Net Worth	2480	2139
Other Liabilities	287	217
Total Liabilities	2767	2356
Non-Current Assets	2013	1354
Net Working Capital (Receivables + Inventories - Payables)	768	741
Net Cash Position (Cash and Cash Equivalents - Total Debt)	-266	32
Other Current Assets	252	229
Total Assets	2767	2356

- Operating Cash flow for FY23 was INR 626 crores as compared to INR 170 crores in FY22, strongly aided by:
 - Higher proportion of India business
 - Strong focus on working capital management; inventory and receivables
- Gross Debt was INR 548 crores as on Mar 31, 2023. Cash and cash Equivalents (including investments in mutual funds) was at INR 282 crores.
 - Net Debt reduced by INR 163 crores to INR 266 crores as on Mar 31, 2023 as compared to INR 429 crores on Dec 31, 2023
- Net Capex additions during the year was INR 76 crores in FY23 as compared to INR 69 crores in FY22
- Net Working capital improved by 22 days to 89 days in FY23 as compared to 111 days in FY22

Domestic Business Q4 FY23



Domestic Formulations (INR crores)

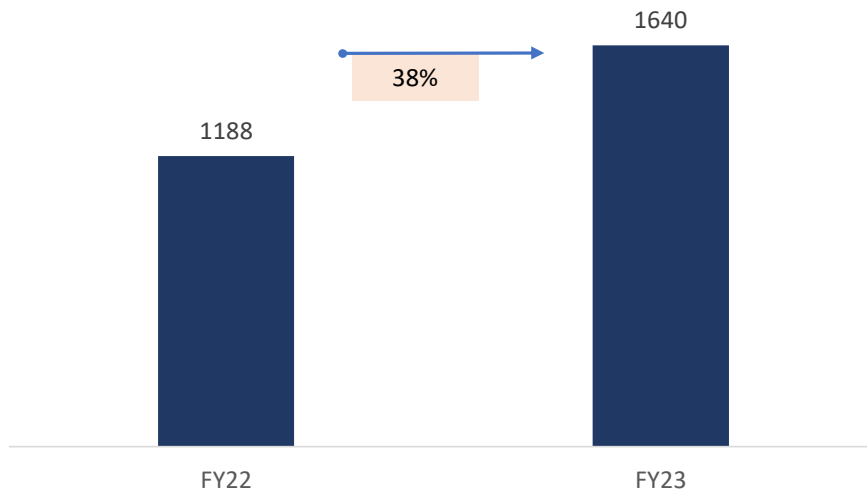


- Domestic business clocked revenue of INR 380 crores in the fourth quarter recording robust growth of 29%
- India business, excluding sales from acquired brands, grew double-digit for the quarter.
 - As per IQVIA MAT Mar'23 data, Industry grew by 15% for Q4 FY23 as compared to JB Pharma which grew at 30%
- New products contributed 5.3% to domestic sales for the quarter
- Azmarda emerged among the top 300 brands in IPM as per IQVIA MAT Mar 23 data
 - JB Pharma reduced prices by 50% in Azmarda in Dec'22.
 - Post exclusivity, a number of players launched Sacubitril-Valsartan
 - Despite stiff competition, the company managed to achieve pre-exclusivity monthly volumes for Azmarda in Mar 23.
- Smooth integration of the acquired 'Razel' franchise. The company is already beginning to witness good momentum for Razel



Domestic Business FY23 – Stellar Performance

Domestic Formulations (INR crores)



- Domestic business recorded growth of 38% at INR 1640 crores in FY23 vs INR 1188 crores in FY22
 - Excluding the acquired brands, domestic business grew mid-teens
- JB Pharma was the fastest growing company amongst the Top 25 in FY23 (IQVIA MAT Mar'23 data)
 - Gained one rank to now stand at #24 (IQVIA MAT Mar'23 data)
- New Products contributed 4.7% to domestic sales in FY23
 - 17 new products were introduced during the year
- Though overall demand was good, raw material prices impacted operating margins for the business
- As per IQVIA MAT Mar 23 data, all 6 major brands gained ranks
 - Rantac gained 10 ranks to #35; Cilacar gained 8 ranks to #44; Metrogyl gained 52 ranks to #142; Nicardia gained 68 ranks to #172; Cilacar-T gained 9 ranks to #194 and Azmarda gained 125 ranks to #261



Domestic Business FY23 - Delivered growth across all 4 pillars

Re-Aligned **Go-To-Market** model driving productivity

- Improvement in PCPM
- New introductions ramping up
- Improved prescriber connect resulting in JB's prescriptions growing better than IPM

Making **Big Brands Bigger**

- Now 6 brands in IQVIA top 300 brands list. Sporlac could be a potential new entrant
- Lifecycle management of the leading brands

Increasing contribution from **Chronic Therapies**

- JB chronic portfolio significantly outpaced IPM's chronic segment
- Razel acquisition to further improve the contribution to the chronic portfolio

Acquisition-led Growth, via strong brand franchises

- 3 acquisitions in the financial year
- With Azmarda and Razel, JB now ranks #8 in the cardiac therapy segment
- Paedia brands' acquisition significantly strengthened the existing division

JB continues as one of the fastest growing companies in its CVM, maintaining a market beating performance in FY 23



Fastest growing company among the Top 25 in the IPM in FY 23

Outperformed the IPM growing at 22% vs 8%

Strong performance by the organic business growing at 21%

Among top 25, JB is the fastest growing pharma company in the IPM

22% Vs IPM growth of 8%

Leadership position in the covered markets

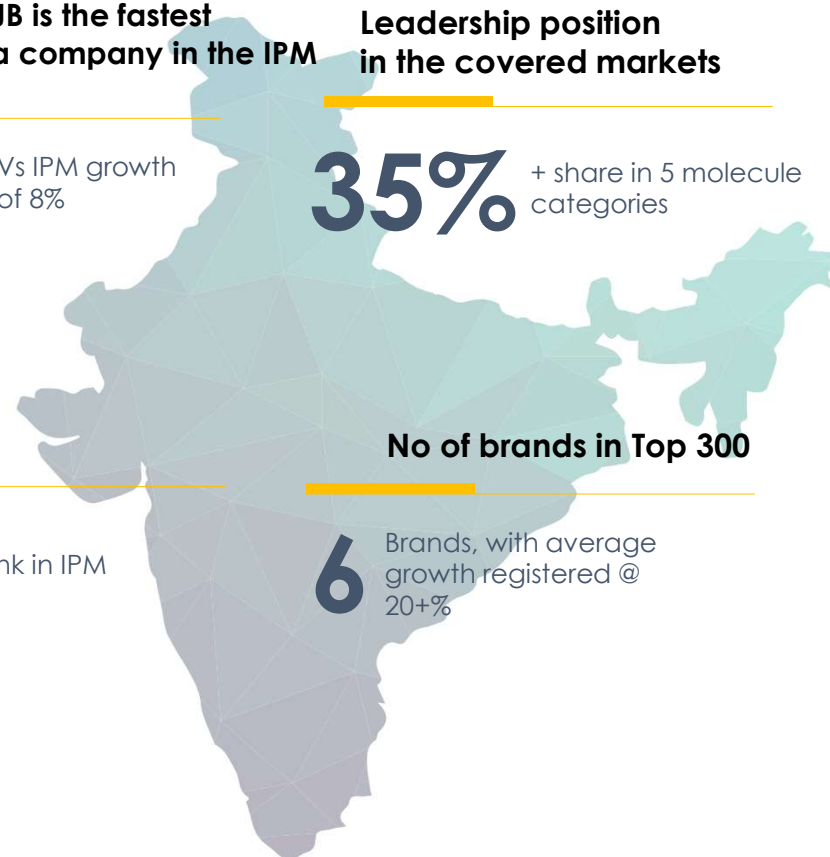
35% + share in 5 molecule categories

Position in IPM

24th Rank in IPM

No of brands in Top 300

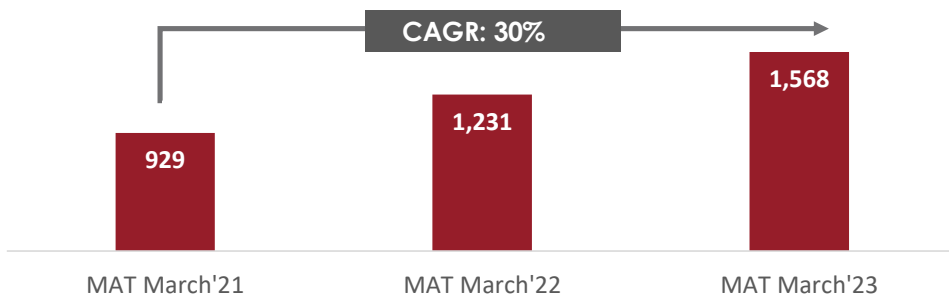
6 Brands, with average growth registered @ 20+%



JB's Prescriptions growing at a market beating pace; company now ranks #15 in the IPM

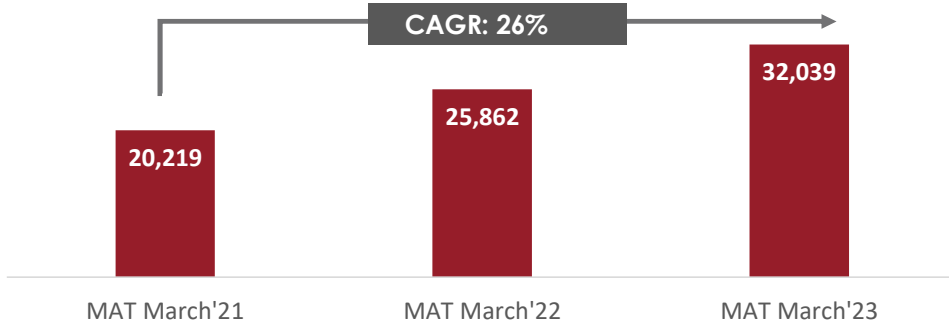


JB Pharma Total Prescriptions (in Lakhs)



Company prescriptions growing at a market beating CAGR of 30% vs IPM growth of 26%

IPM Total Prescriptions (in Lakhs)



Ranked **#15** in prescriptions in the Indian Pharma Market

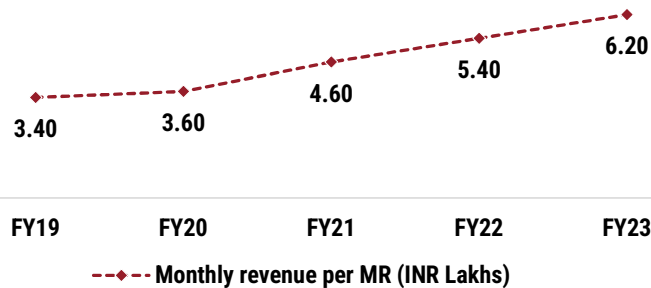
Rantac and Metrogl amongst the Top 10 most prescribed brands in the IPM



PCPM Improved to INR 6.20 lakhs; Newly Launched Brands gaining traction

Constant improvement in PCPM[#]

Constant improvement in PCPM[#]



- PCPM stands at INR 6.20 lakhs at the end of FY23, up from INR 5.40 lakhs in FY22
- Existing field force deployed for Nephrology, Paedia, Respiratory, Diabetes and the acquired brands

New launches garnering better revenues^{*}

BRANDS	Brand Launch	MAT MAR'21	MAT MAR'22	MAT MAR'23
RANTAC RD	Oct-20	1	7	12
LAXOLITE	Jan-20	3	7	10
DAPACOSE	Feb-21	0	6	9
AKAIR-LC	Feb-21	0	2	7
METROGYL O	Aug-21	0	2	6

Some of the fastest growing new launches^{*}

- Rantac RD and Laxolite became INR 10+ crores brands
- Dapacose, Alkair LC and Metrogyll O gaining good momentum

[#]PCPM: Per capita sales per month

^{*} As per IQVIA MAT Mar'23 data

Brands Getting Bigger: Now 6 brands in the Top 300



	<u>MAT Mar'22 Value Sales*</u>	<u>MAT Mar'23 Value Sales*</u>	<u>MAT Mar'22 Rank</u>	<u>MAT Mar'23 Rank</u>
RANTAC	289	353	#45	#35
CILACAR	273	324	#52	#44
METROGYL	147	191	#194	#142
NICARDIA	116	147	#240	#172
CILACAR-T	111	138	#203	#194
AZMARDA	78	114	#386	#261

All data as per IQVIA *INR crores



Building Stronger Brand Franchises

CILACAR®

INR 345 crs → **INR 524 crs**
IQVIA MAT Mar'21 IQVIA MAT Mar'23

CILACAR T

CILACAR M

CILACAR TC

CILACAR TM

CILACAR C

RANTAC®

INR 285 crs → **INR 415 crs**
IQVIA MAT Mar'21 IQVIA MAT Mar'23

RANTAC DOM

RANTAC MPS

RANTAC RD

RANTAC MPS LA

RANTAC R

metrogyt®

INR 192 crs → **INR 296 crs**
IQVIA MAT Mar'21 IQVIA MAT Mar'23

METROGYL P

METROGYL DG

METROGYL IV

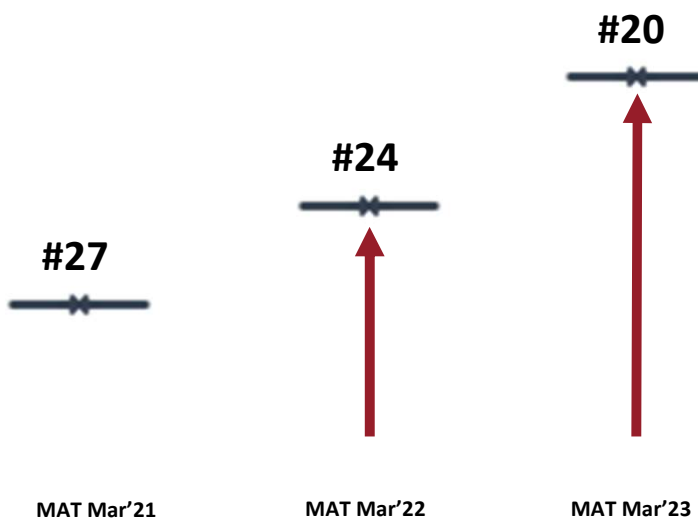
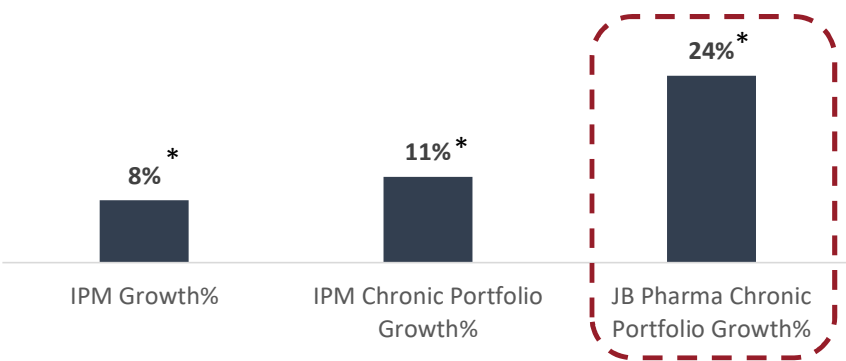
METROGYL O

METROGYL M

Chronic Portfolio Outperformed the IPM and Overall Chronic Therapy; JB Pharma now among the top 20 in the chronic segment



JB Pharma's Chronic Portfolio
Outperforming the IPM

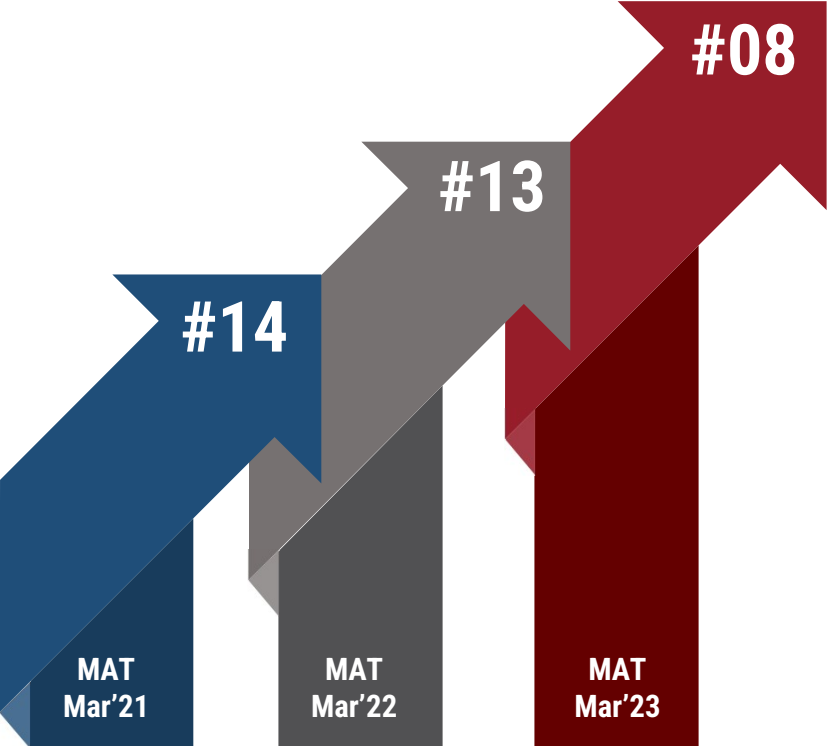


- As per IQVIA MAT Mar'23 data vs MAT Mar'22 numbers, JB Pharma's Chronic grew by 24% while the overall industry Chronic portfolio grew only by 11%
- 3 years CAGR was 26% for JB vs 12% for the industry as a whole

- JB now ranks #20 in the overall chronic segment in the industry
- Gained 4 ranks in a year as per IQVIA MAT Mar'23 data

*Growth as per IQVIA MAT Mar'23 vs MAT Mar'22 data

JB Pharma now ranks amongst the Top 10 in the Cardiac Therapy; 3 brands among in the top 25 in Cardiology segment



Gained 5 Ranks in one year

	MAT MAR'21	MAT MAR'22	MAT MAR'23
CILACAR [®]	4	4	4
Nicardia [®]	40	30	20
CILACAR-T [®]	47	32	23

3 brands in Top 25 in the Cardiology segment

Addition of progressive and strong brands - Azmarda and Razel

Domestic Business - 3 acquisitions in FY23



Sanzyme Portfolio - Completed in FY22

- Marked JB's entry into the high growth probiotics segment
- Portfolio recorded strong YoY growth of 24% as per IQVIA MAT Mar'23 numbers

Paedia Portfolio

- Four niche paedia brands acquired
- Ability to leverage our existing paedia sales force
- Strengthens presence across all major paediatric therapeutic areas

Azmarda

- High growth, specialty focused brand in the fast-growing Heart Failure segment
- Adds to the company's existing strength of its Cardiac portfolio

Razel Franchise

- Entry into the statins space which is the largest in cardiac therapy
- Ranked #10 in the Rosuvastatin molecule market
- Another strong addition to the Cardiac portfolio

Sporlac – Sterling performance in FY23



Sporlac now ranks #334, gained 152 ranks in the year*

Ranks #1 in its covered market space

Sales grew by 43% over the year to INR 92 crores as per IQVIA MAT Mar'23 data

Sporlac prescriptions increased by 55% during the year to 1.34 crore prescriptions as per IQVIA MAT Mar'23 numbers

** IQVIA MAT Mar'23 data*



Performance Over the Year: Azmarda

***Entered the IQVIA Top 300 brands list, now ranks #261**

Azmarda recorded growth of 46% as per IQVIA MAT Mar'23 data with the total sales being INR 114 crores

Azmarda prescriptions increased by 127% in a year to 2.32 lakhs as per IQVIA MAT Mar'23 data



Performance Over the Year: Paedia Brands

Portfolio sales improved by 19% over the year* to INR 54 crores

**Robust growth of 31% in Pedicloryl, IQVIA MAT Mar'23;
sales of INR 12 crores**

**Strong prescription improvement in Z&D (16%), Pedicloryl (139%) and
Ezinappi (50%)**

* IQVIA MAT Mar'23 data



Razel: JB Pharma's Latest Acquisition

JB Pharma enters the largest category* in the Cardiac segment – Statins

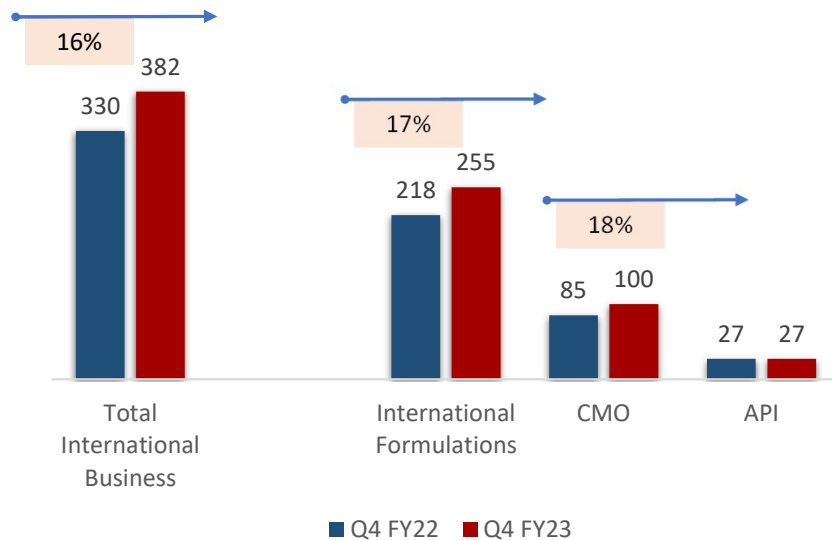
Razel ranks amongst the top 10 brands in the Rosuvastatin molecule market

With this acquisition, JB is now present in the 3 most progressive cardiology segments

- Hypertension: Cilacar and Nicardia
- Heart Failure: Azmarda
- Statins: Razel

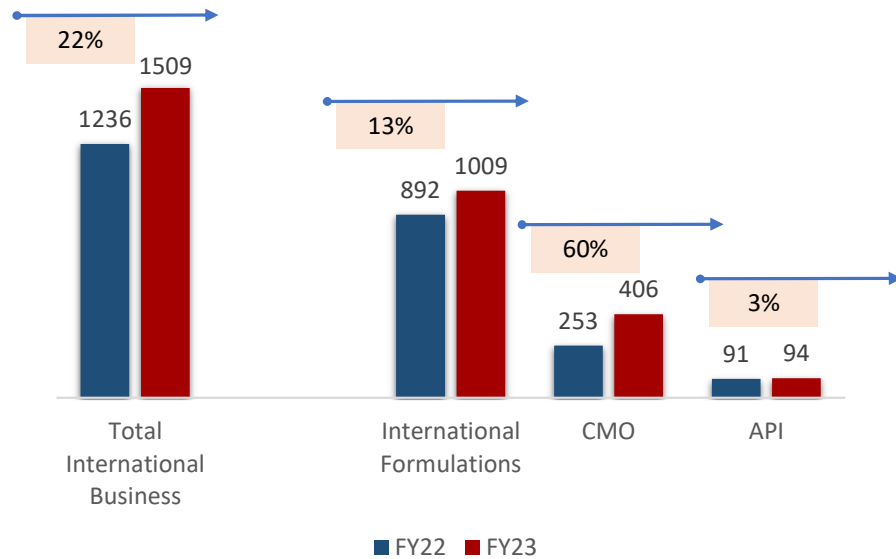
Enhances prescription productivity with cardiologists and consulting physicians

International Business Q4 FY23



- International Business grew by 16% to INR 382 crores in Q4 FY23 vs INR 330 crores in Q4 FY22
- International Formulations business was at INR 255 crores in Q4 FY23 v/s INR 218 crores in Q4 FY22 recording growth of 17%
 - Russia business witnessed demand revival, while in South Africa focus continues to be on increasing share of private business
 - Other BGx markets recorded stellar performance providing impetus for the international formulation business
- CMO business maintains its stellar performance and recorded sales of INR 100 crores in Q4 FY23 growing at 18%
- Current geo-political and economic uncertainty continues to impact demand. Cost Inflationary environment persists across all markets
- Logistics and freight costs relatively softened towards the end of the financial year

International Business Performance FY23



- Total International business revenue for the financial year was INR 1509 crores registering growth of 22%
- International formulations business grew 13% to INR 1009 crores during the year from INR 892 crores in FY22
 - Russia situation impacted demand for the region in the first half
 - Other BGx markets opened up post-Covid and demand normalcy was restored
- CMO business was the stellar performer recording revenue growth of 60% at INR 406 crores
 - CMO revenue as percentage to overall international sales increased to 27% in FY23 as compared to 20% in FY22
 - Increased demand from existing customers due to the prolonged cough and cold season across the world
 - Number of new products launched across markets which would gain traction in the coming years



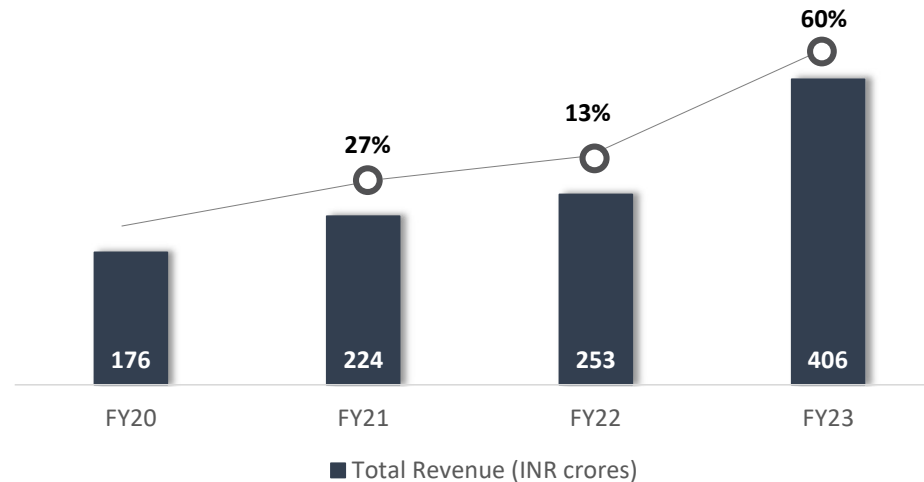
Besides domestic business, the CMO business also one of the main focus areas for the organization

60%
YoY growth in FY23

Projects focused on lozenges, syrups, tablets, ointments and creams

Enhanced focus on high-potential lozenges segment

Consistent Growth in the CMO Business



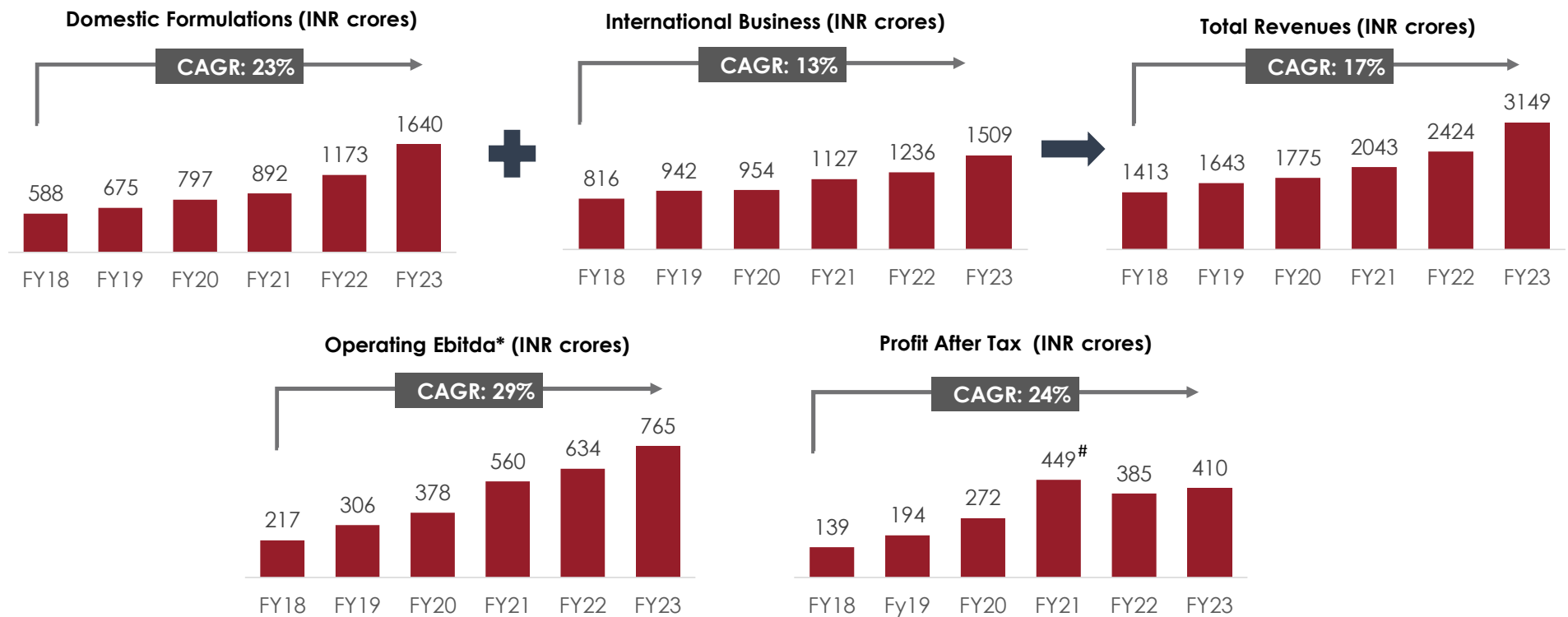
Coverage into semi regulated/other RoW markets

Experience in working with marquee global pharma/ consumer client base

Approvals from leading regulators - US, UK, EU, Australia, South Africa, Russia/CIS and Japan



Consistent Revenue/EBITDA growth over the years



* Operating EBITDA excludes non-cash ESOP

[#] Includes other income of INR 105 crores



Q4 and FY23 Financial Performance (Consolidated)

Particulars	Q4 FY23	Q4 FY22	YoY Growth	FY23	FY22	YoY Growth
Revenue from Operations	762	625	22%	3149	2424	30%
Cost of Goods Sold	275	213	29%	1168	843	39%
Gross Profit	488	412	18%	1981	1581	25%
Gross Profit Margins	63.9%	65.9%		62.9%	65.2%	
Employee Benefit Expenses	136	116	17%	543	439	24%
Other Expenses	188	171	10%	742	599	24%
EBITDA	164	125	31%	696	543	28%
EBITDA Margins	21.5%	20.0%		22.1%	22.4%	
Finance Costs	14	2		36	5	
Depreciation	32	22	44%	114	73	57%
Profit before Tax (Operating)	118	101	17%	545	466	17%
Other Income	5	2		10	39	
Profit before Tax	122	103	19%	555	505	10%
Tax Expenses	35	18	94%	145	119	22%
Profit after Tax	88	85	4%	410	386	6%

JB Pharma – Looking ahead



Growth objectives supported by lean organization structure and strong governance framework

Domestic business to consistently outperform market growth driven by

- ❑ Big brands becoming bigger
- ❑ Market share & prescription gains in acquired portfolio of probiotics, heart-failure, paediatric and Lipid-lowering segment
- ❑ Life cycle management and new launches

Continuous thrust on cost optimization initiatives

- ❑ Deliver operating margins in the range of 25% - 27%, despite inflationary pressure & external market uncertainties
- ❑ Cost savings continue to be area of focus; raw material & power/fuel still seeing sharp inflation

India and CMO business should constitute in the near-term to around 75% - 80% of total revenue. Both businesses generate high ROCE and Operating margins

Continued growth momentum in International business

- ❑ Strong delivery in CMO business aided by new launches
- ❑ Demand revival in specific ROW markets and continuous thrust on improving productivity & cost structure
- ❑ Focus on building progressive portfolio for the long term

Continue building culture of governance & higher compliance

- ❑ Increased focus on business sustainability by strengthening ESG, governance and compliance
- ❑ Continue to build upon One JBWay culture and the new corporate identity

India business should continue to deliver market-beating growth; Focus on increasing chronic share to 60% in the mid-term



About JB Pharma

J.B. Pharma (BSE: 506943 | NSE: JBCHEPHARM | ISIN: INE572A01028), established in 1976, is one of the fastest growing pharmaceutical companies in India and a leading player in the hypertension segment. Besides its strong India presence, which accounts for majority of its revenue, its other two home markets are Russia and South Africa. In India, the company has six brands among the top 300 IPM brands in the country. The company exports its finished formulations to over 40 countries including the USA. Besides supplying branded generic formulations to several countries, it is also a leader in the manufacturing of medicated lozenges. The company ranks among the top 5 manufacturers globally in medicated and herbal lozenges. It has seven state of the art manufacturing facilities in India including a dedicated manufacturing facility for lozenges. The manufacturing facilities are certified by leading regulators across the world.

For more details on J.B. Pharma, please visit www.jbpharma.com.



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for GOOD HEALTH

Thank you



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