



October 14, 2022

National Stock Exchange of India Limited,
Compliance Department,
Exchange Plaza, Bandra Kurla Complex,
Bandra (East), Mumbai - 400051,
Maharashtra, India

BSE Limited,
Compliance Department,
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai - 400001,
Maharashtra, India

Dear Sir/Madam,

Subject : **Updated Investor Presentation**

Stock Code : **BSE – 539787, NSE – HCG**

Ref : **Regulation 30 and Part A of Schedule III of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015**

Further to the intimation dated September 27, 2022, we are submitting herewith the updated Investor Presentation.

Kindly take this on record.

Thanking you,

For HealthCare Global Enterprises Limited

Sunu Manuel
Company Secretary & Compliance Officer

Encl: a/a.

HealthCare Global Enterprises Limited

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HEALTHCARE GLOBAL ENTERPRISES LIMITED



DISCUSSION MATERIAL
October 2022



Safe Harbor



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Pioneered Scalable Model for Comprehensive Cancer Care

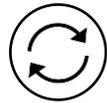


Largest oncology focused hospital chain with a pan India network

1

5

Marquee leadership team and experienced management



Comprehensive cancer care model with a focussed factory approach

2

6

Leveraging digital transformation to strengthen patient and doctor engagement



33+ years of differentiated care leading to **superior patient outcomes**

3

7

Implementing **asset-light model** for efficient capital allocation and better returns



Consistent track record of being first to launch **state-of-the-art technology** in India

4

8

High growth trajectory with roadmap for margin expansion

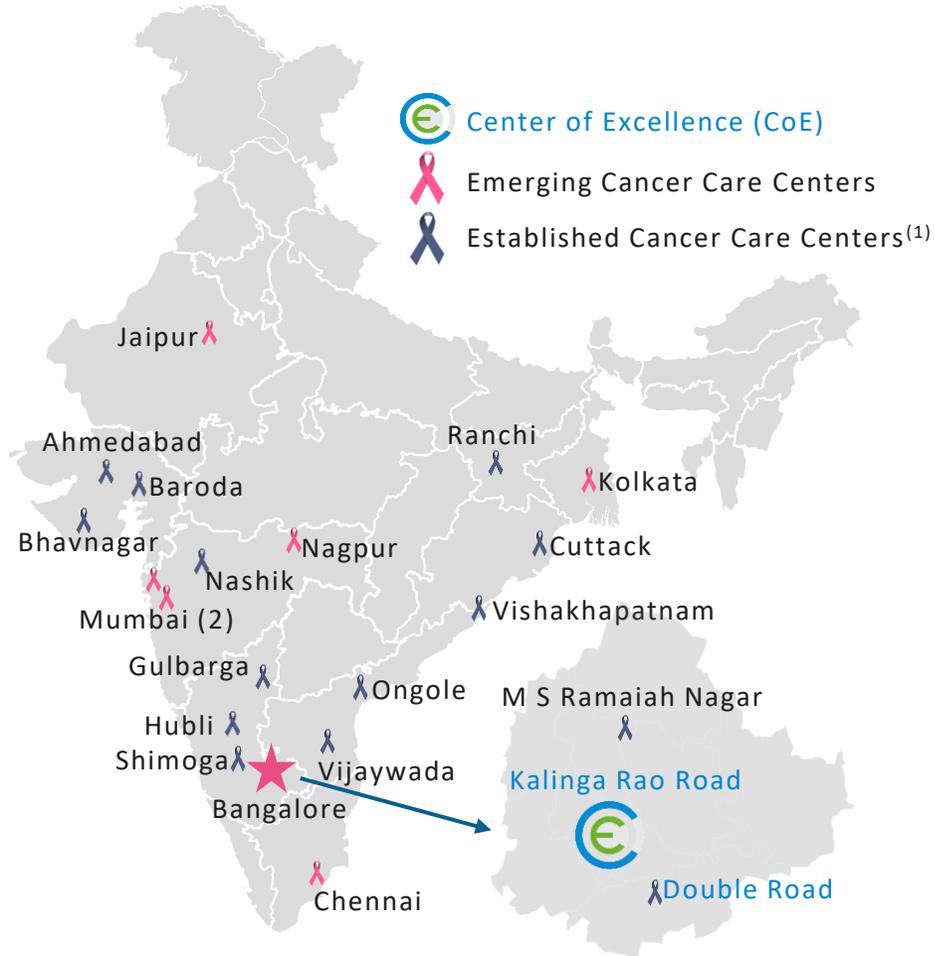




Largest Pan-India Oncology Hospital Chain

Best-in-class cancer care by adopting globally acclaimed practices and state-of-the-art technology

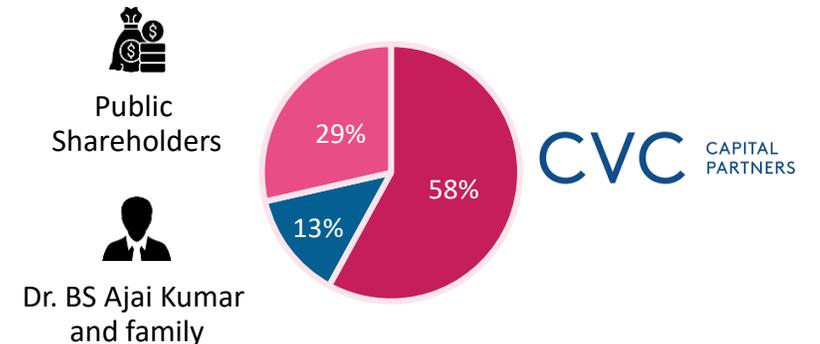
Largest cancer care network in India



33+ years of Clinical Excellence



Shareholding Pattern as of Jun'22

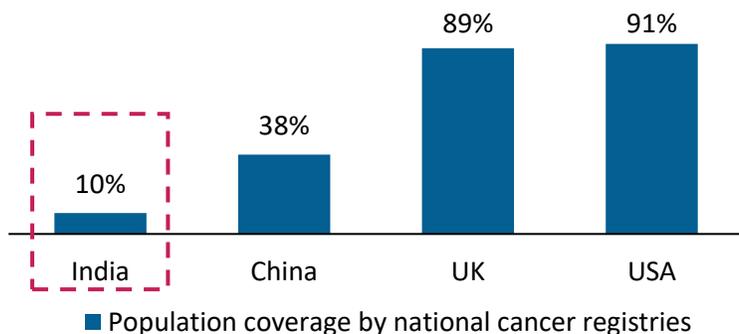


(1) Established centers were operational before 2017; (2) Includes 1 in Kenya. Bhavnagar multispecialty also includes comprehensive cancer care and included in CCC count; (3) CCC – Comprehensive cancer care center, defined as offering surgical, medical and radiation oncology services onsite, along with diagnosis / PET CT as well in some cases; (4) Includes multispecialty beds; (5) New patient registrations in last 5 years in oncology

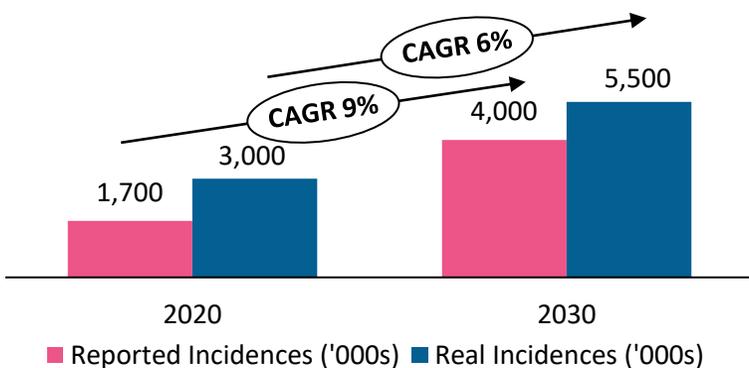


High Patient Volume driving Oncology Growth in India

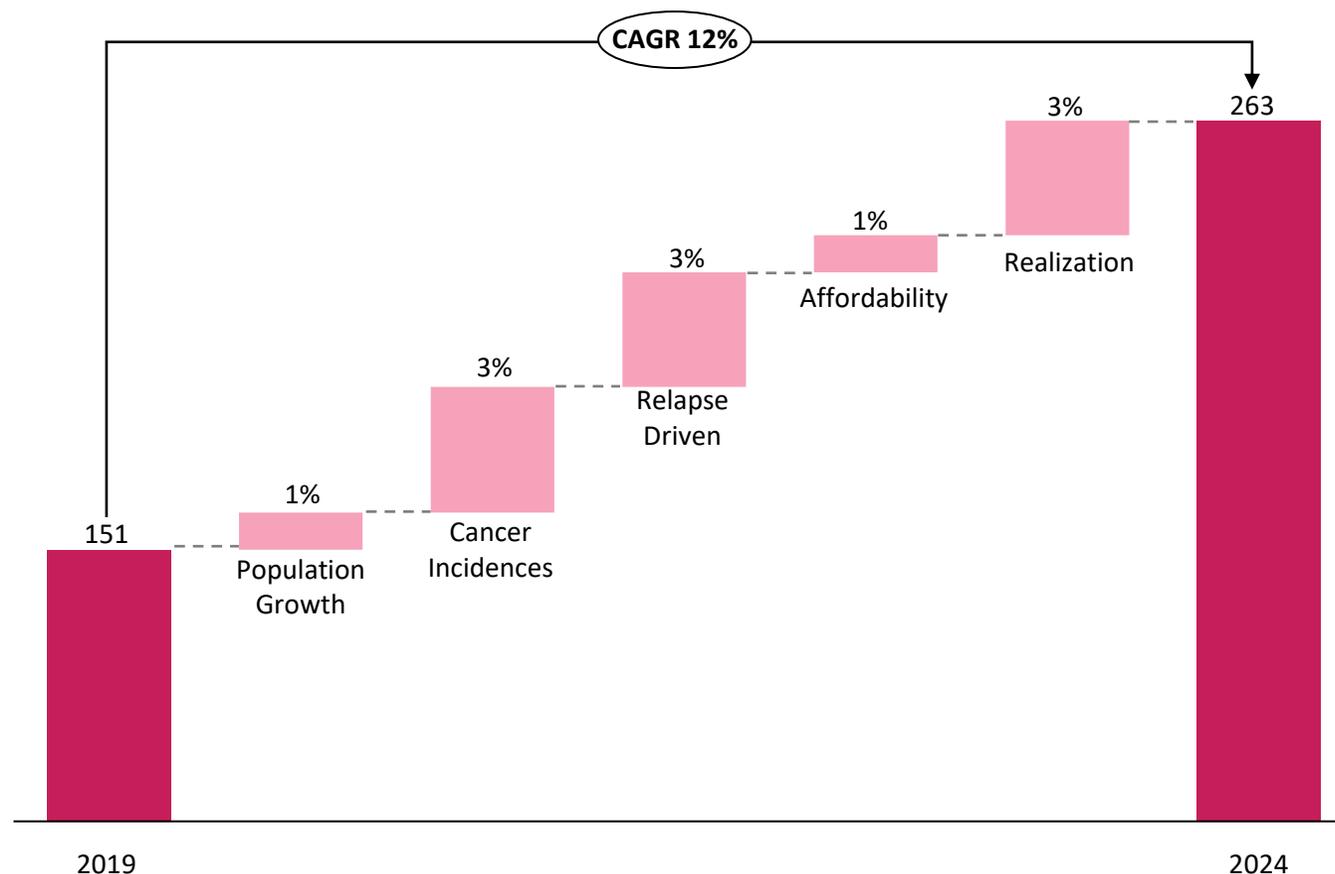
Under-coverage of Population



Increasing Cancer Incidences in India



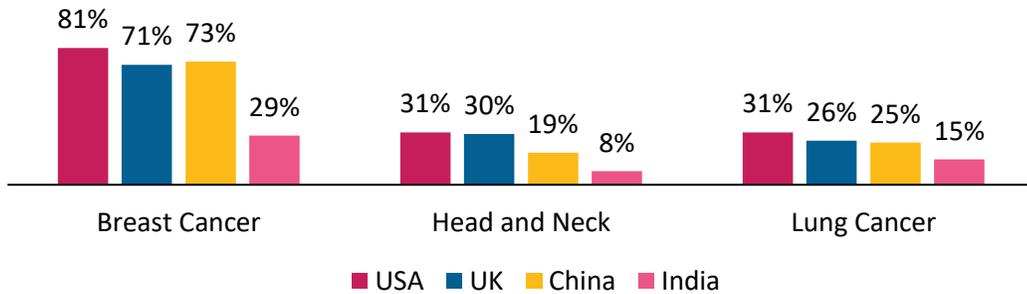
Indian Cancer Care Industry (INR bn) – Projected Growth



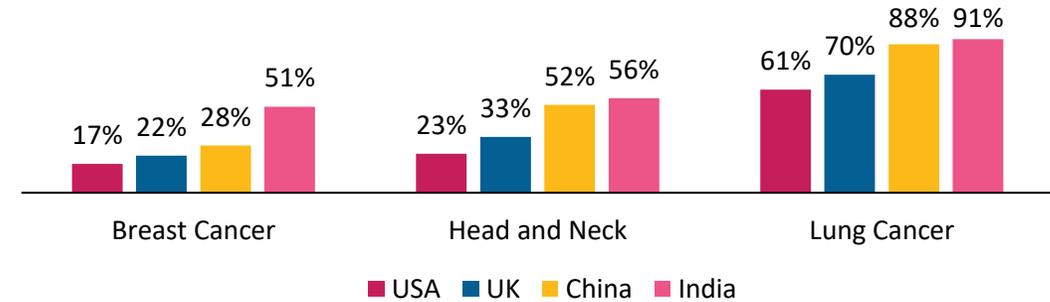


High Growth Headroom due to Low Population Coverage

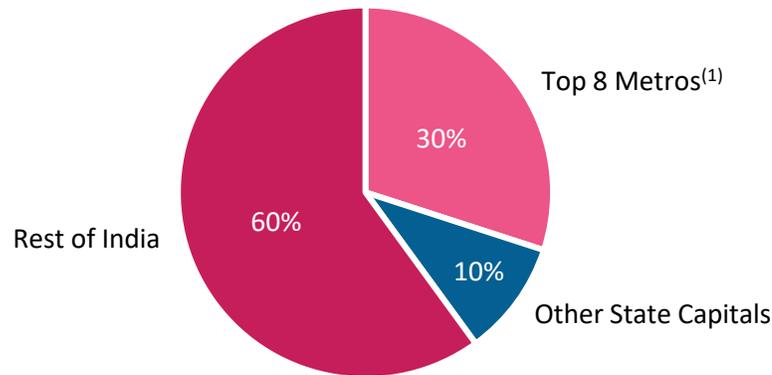
Low Early-stage Diagnosis in India ...



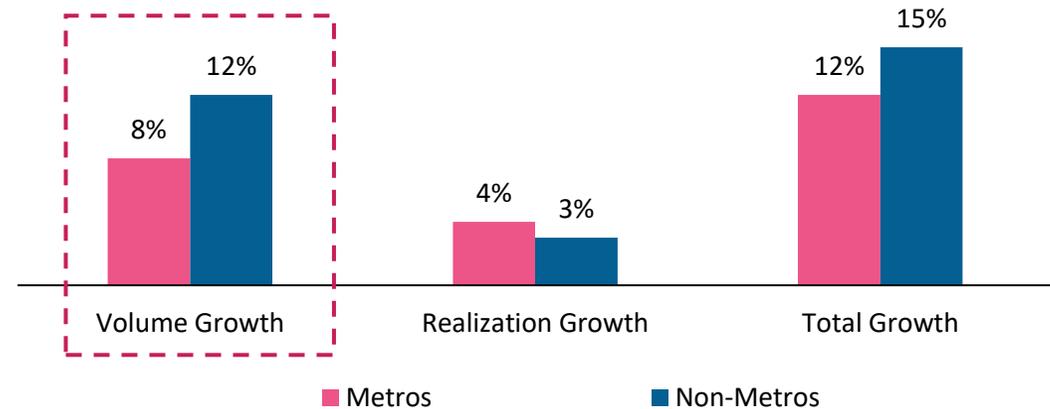
...leading to High Mortality to Incidence Ratio



Majority of the Comprehensive Cancer Centers concentrated in Metros...



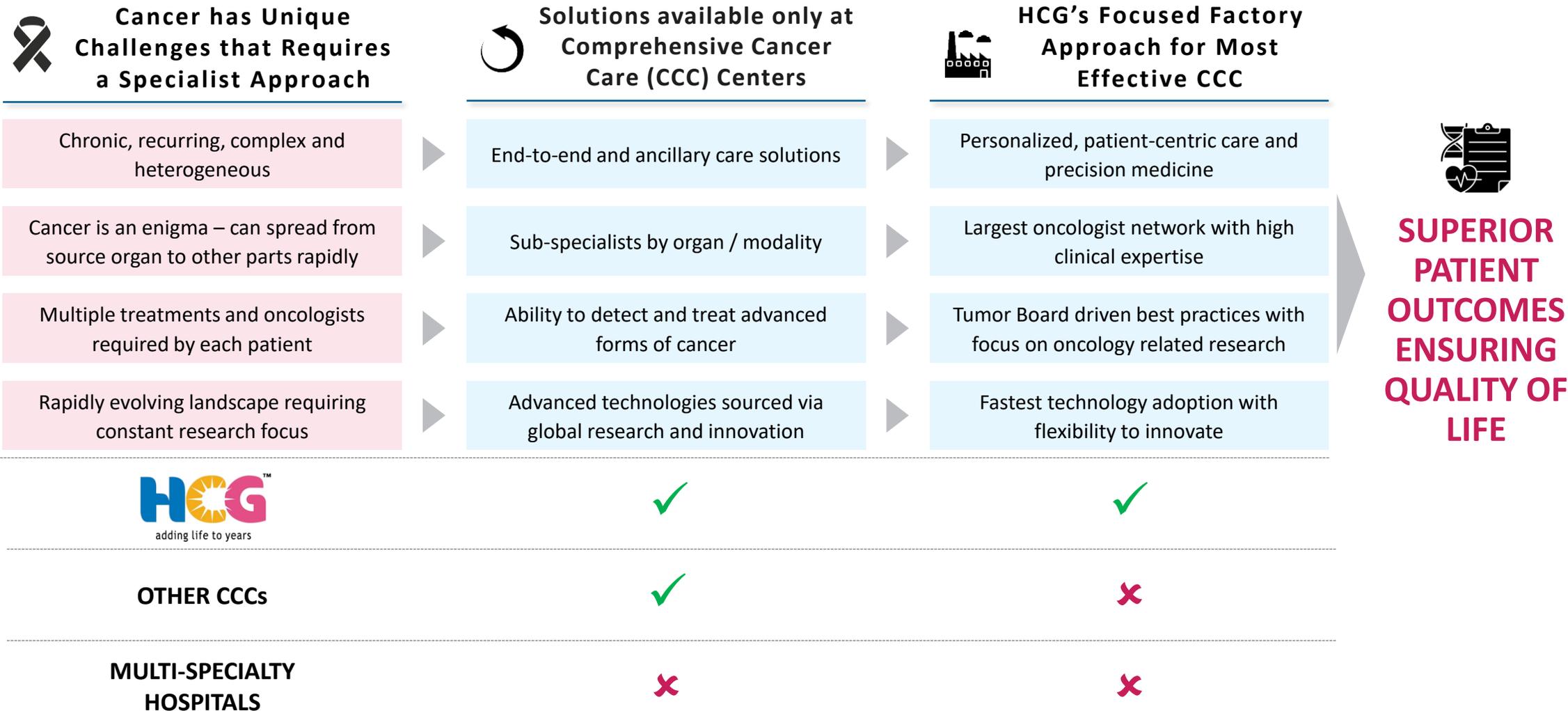
...but Non-Metros to Grow Faster than Metros mainly driven by Volume Growth (FY19-FY24)





Focused Factory Approach is critical for Quality of Life

Cancer requires specialized care available at focused players only, with emphasis on clinical expertise





Dominant Network in Cancer Care with Market Leadership across 13 out of 18 Cities



HCG is committed to provide last mile cancer care across India and is the largest player with >1.6x footprint of CCCs as compared to the next largest player

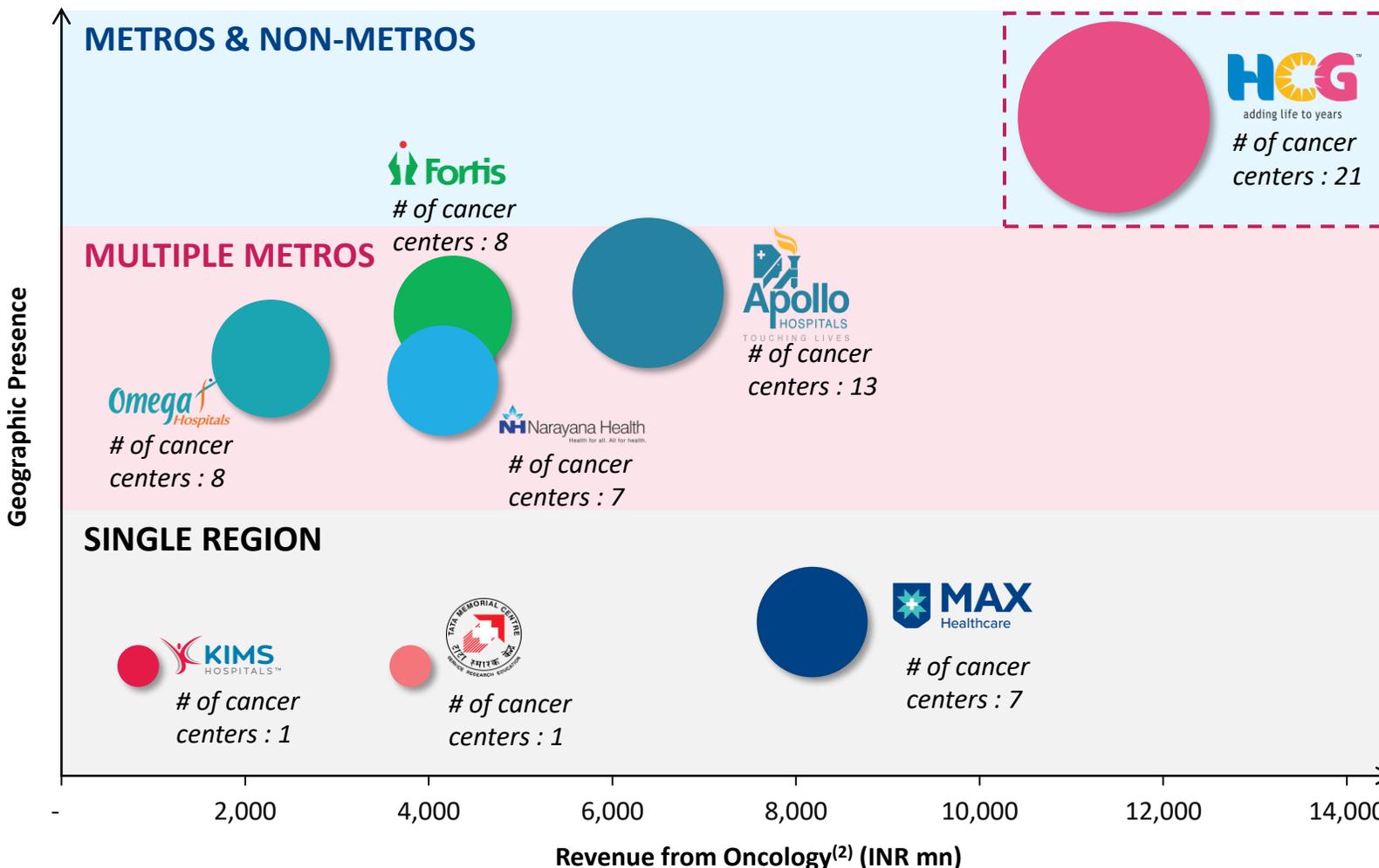
MARKET LEADERSHIP ACROSS REGIONS⁽¹⁾

- 1 Leader Across States**
- ❖ Karnataka
 - ❖ Gujarat
 - ❖ Jharkhand
 - ❖ Odisha

- 1 Market Leadership across cities**
- ❖ Ahmedabad
 - ❖ Bangalore
 - ❖ Nashik
 - ❖ Nagpur
 - ❖ Cuttack
 - ❖ Bhavnagar
 - ❖ Vijayawada
 - ❖ Ranchi
 - ❖ Baroda
 - ❖ Shimoga
 - ❖ Gulbarga
 - ❖ Hubli
 - ❖ Ongole

- 3 Top 3 in other cities**
- ❖ Jaipur
 - ❖ Vizag

Bubble size represents the number of Cancer Care Centers



(1) Market position by revenue based on management estimates. For private oncology players only (excluding trusts, government hospitals); (2) FY21 revenue for Tata Memorial Hospital - Mumbai, Apollo Hospitals and Omega Hospitals; FY22 revenue for all others. Note: Oncology share is assumed to be 100% for Tata Memorial and Omega Hospitals. For Apollo Hospitals, only hospital revenue (Healthcare Services) is considered

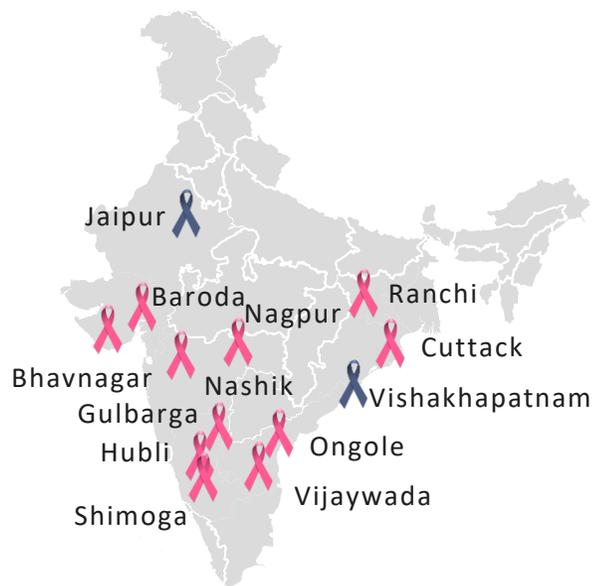


Successfully Decoded Non-metro Business Model

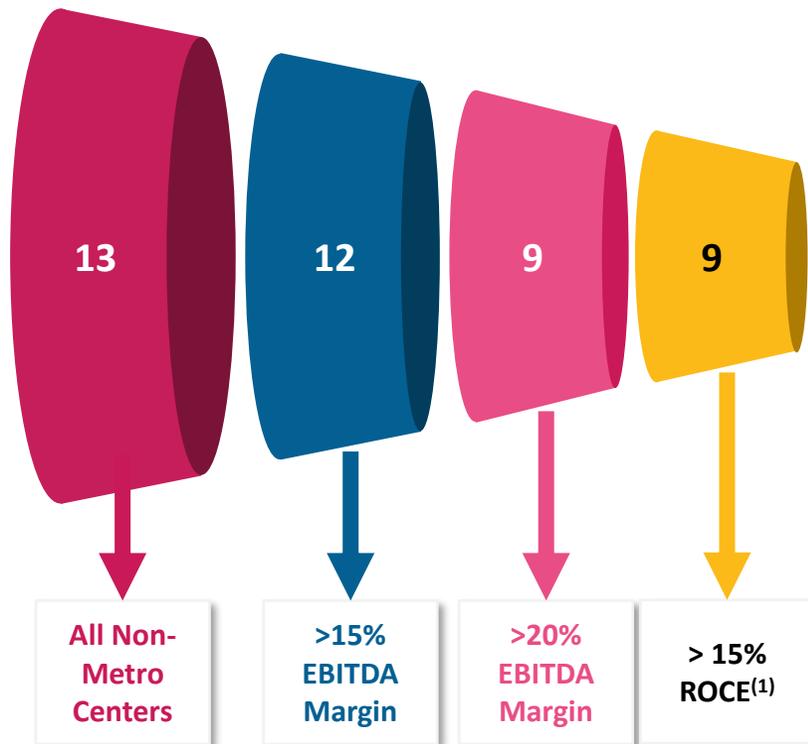
MARKET LEADER IN ALMOST ALL NON-METRO CENTERS

9 NON-METRO CENTERS WITH HIGH-TEEN ROCE

SUCCESSFUL SCALABLE NON-METRO MODEL



- Market Leadership (11)
- Top 3 in other Non-metro Centers (2)



| Key Parameters ⁽¹⁾ | Metro | Non-Metro |
|-------------------------------|-------|-----------|
| Revenue CAGR ⁽²⁾ | 20% | 18% |
| Average EBITDA % | 25% | 23% |
| Payor Mix ⁽³⁾ | 85% | 54% |



One Stop Solution with Superior Clinical Expertise

END-TO-END CANCER CARE SERVICES AT HCG

DIAGNOSTICS

 Physical Examination

 Laboratory Tests

 Digital PET

 Digital Pathology

TREATMENT

 Chemotherapy

 Radiation⁽³⁾

 Robotic Surgery

 Targeted Drug Therapy

 Immunotherapy

 Psycho-oncology

 Endocrine Therapy

 Bone Marrow Transplant

 Nuclear Medicine

 Genomics

 Liver Transplant

 Pediatric Oncology

POST CARE

 Patient Care

 Home Health Services

 Psychological Support

 Preventive Oncology

 **Not available or outsourced at multi-specialty hospitals**

Expertise in Handling Complex Cases⁽¹⁾

4.5k+

Genomic based
Chemo sessions

4.3k+

CyberKnife Cases⁽²⁾

10.2k+

Organ Preservation
Surgeries

2.8k+

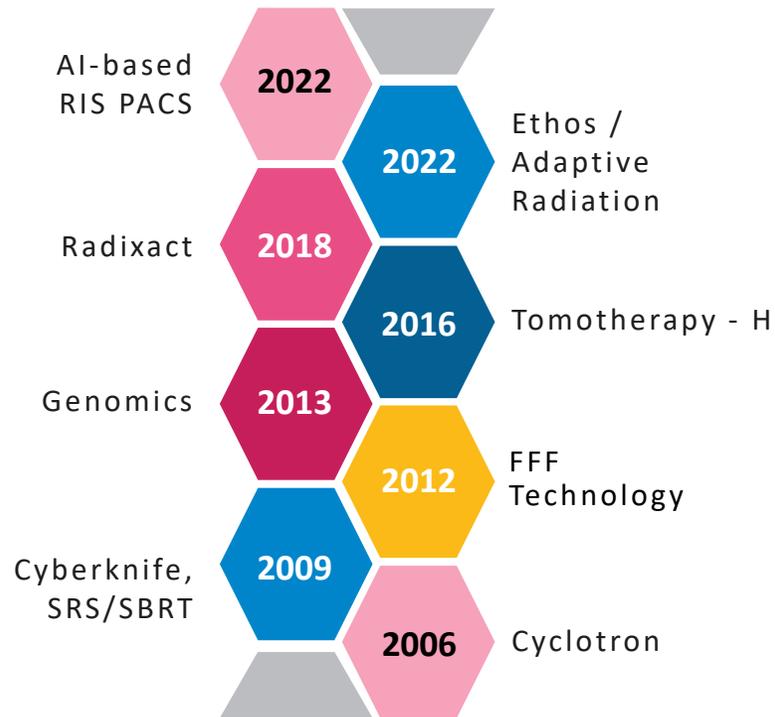
Robotic Surgeries in
Oncology

(1) Cases handled in last 5 years; (2) Total CyberKnife cases performed till date
(3) Apollo has only 13 centers providing radiation facilities in a network of 71 hospitals



Many Firsts of Cutting-edge Technology Introduction for Integrated Cancer Care

TRACK RECORD OF BEING 1st TO LAUNCH ADVANCED TECHNOLOGY IN INDIA



Introducing organ-specific working committees – gastrointestinal, head & neck, breast, etc. for better data collection & analysis to improve patient outcome

State-of-the-art Equipment in each modality

DIAGNOSTICS

Total PET CTs : 17



Digital PET CT



Digital Pathology



Automated Breast Volume Scanner



Digital Mammography



Skyra Tesla 3T for MRI



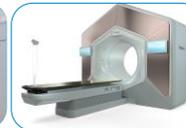
Molecular / Genomics lab

RADIOTHERAPY

Total LINACs : 30



2 CyberKnife



Ethos



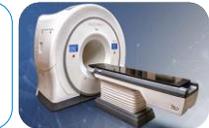
TrueBeam



Versa HD



Radixact



5 Tomotherapy

MEDICAL / SURGICAL ONCOLOGY

Total Robots: 3



DaVinci Robot



Versius Robot



HoloLens



Bone Marrow Transplant Units



Tumor Board based Treatment Approach for Patients

PIONEER OF TUMOR BOARD IN INDIA

- 17+ years of nation wide, Tumor Boards held weekly
- Supplemented by multiple local tumor boards

#1

Largest Tumor Board in India

Decision Making Body

Focused committee to shortlist cases to be discussed

Tumor Board Conveyor

Chairman

Special Committee

36k+

Total Cases Discussed till Date

Panelists

15 panelists encompassing various specialists

Leading Oncologists

Radiologists and Pathologists

Treating Clinicians

250+

Oncologist Participation

Participants

Floor open to question and discuss overall treatment plan

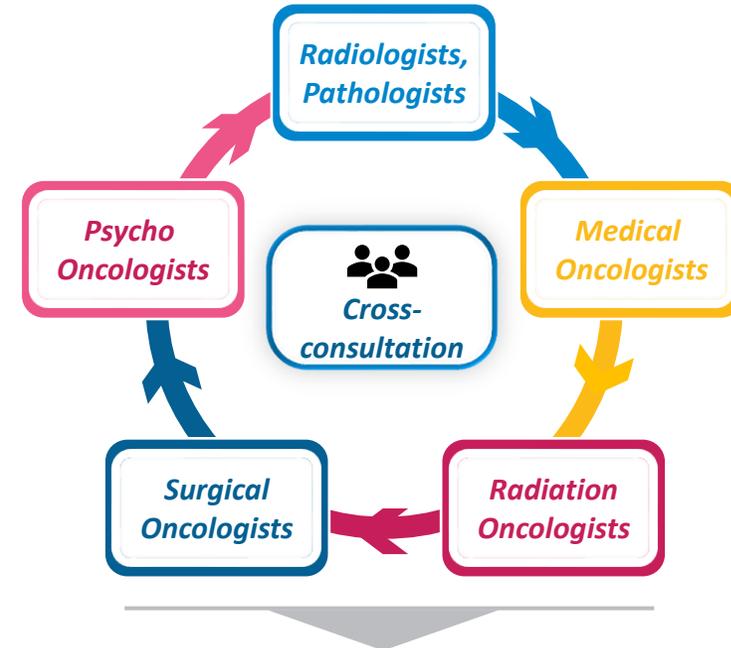
Decision Making Body

Panelists

All Other Clinicians

Tumor Board Approach

Case-specific panel curated involving multiple specialists for planning and implementing **efficient treatment**



RIGHT TREATMENT – THE FIRST TIME ITSELF


Specialized Team


End-to-end Visibility


Patient Centric


Accuracy and Reliability



Led by Board of Directors comprising of Industry Veterans

Dr. BS Ajai Kumar

Executive Chairman

Visionary and key driving force of HCG, with an aim to make advanced cancer care accessible



Raj Gore

Whole-time Director and CEO

Seasoned healthcare leader with 20+ years in management across North America, Asia & Africa



Abhay Prabhakar Havaladar

Non-Executive Independent Director

Established General Atlantic's India Office. Board member of Jubilant Foodworks, IBS Software etc.



Geeta Mathur

Non-Executive Independent Director

Experienced finance professional, serving on Boards of India Infoline, Sentiss Pharma etc.



Rajagopalan Raghavan

Non-Executive Independent Director

30+ years of leadership experience. Currently serving as Head of HR at Indigo Airlines



Siddharth Patel

Non-Executive Non-Independent Director

Partner at CVC. 20+ years of leading successful investments across sectors globally



Amit Soni

Non-Executive Non-Independent Director

Partner at CVC. 15+ years of investment experience including General Atlantic and 3i



Anjali Ajaikumar Rossi

Executive Director - Strategy

Social entrepreneur with over 12+ years in healthcare; focused on quality and strategy



Jeyandran Venugopal

Non-Executive Independent Director

20+ years in technology & product innovation; Currently Chief Product Officer Flipkart



Pradip Kanakia

Non-Executive Independent Director

36+ years in audit and governance. On the Board of JM Financial, Camlin Fine Science etc.





Marquee Management Team supported by Experienced Promoters

SEASONED PROMOTERS – LEADING VALUE CREATION



Dr. BS Ajai Kumar

Founder and Executive Chairman

- Served as the CEO from 2005 to 2021
- Over 40+ years of experience in practicing oncology in India and US



CVC Capital Partners

Promoters & Board Members

- Large portfolio of marquee healthcare investments globally of c. USD 12 bn+

Significantly Expanded Management Team with Senior Healthcare Professionals

| | | | | | | | | | |
|------------------------|----------------------------------|---|---------------------------------|-----------------------------------|--------------------------|-----------------------------------|--|--------------------------------------|-------------------------------------|
| | | | | | | | | | |
| Raj Gore CEO | Srinivasa Raghavan CFO | Dr. Bharat Gadhavi Head-Gujarat | Deepti Tewari Head HR | Ashutosh Kumar Strategy | Sudeep Dey CIO | Vineesh Ghei Head Sales | Sapna Agarwal Head of Operations | Madan Sampath Supply Chain | Stuti Jain Head Marketing |
| 20+ | 25+ | 20+ | 20+ | 13+ | 20+ | 25+ | 15+ | 15+ | 15+ |
| | | | | | | | | | |
| | | | | | | | | | |

■ New Hires since 2020 ■ Existing Management

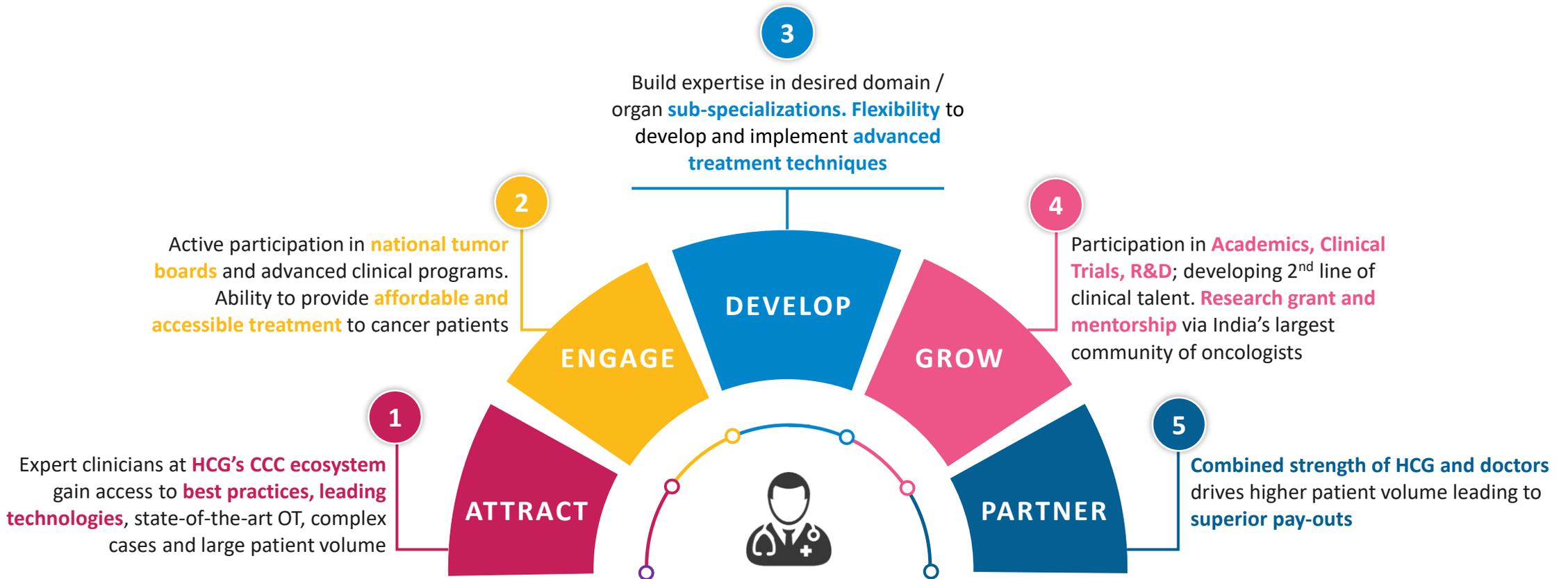
Total years of experience



Unique Oncologist Engagement Model to Develop and Retain Expert Clinicians



HCG has emerged as a major hub for attracting and developing top clinical talent, with its unique offerings of multi-modality learning and sub-specialization expertise providing very high value proposition





Leveraging Digital Transformation to Reshape Patient and Partner Engagement

KEY DIGITAL TRANSFORMATION IMPERATIVES FOR HCG 2.0



Increasing reach and awareness



Omnichannel patient engagement



Ecosystem of digital healthcare



Integrated patient-lifecycle management



Improving customer convenience



Digitalized post discharge engagement

Transforming Patient Journey - Optimizing Engagement



Cloud Telephony

Seamless tracking of offline leads; auto-dialer for lower TAT; controls for handling missed calls



E-Prescription

Doctor platform; access to medical history; captures chief complaints, diagnosis etc.



Patient Application

Self service tool for appointments, consultations, medicines and patient engagement



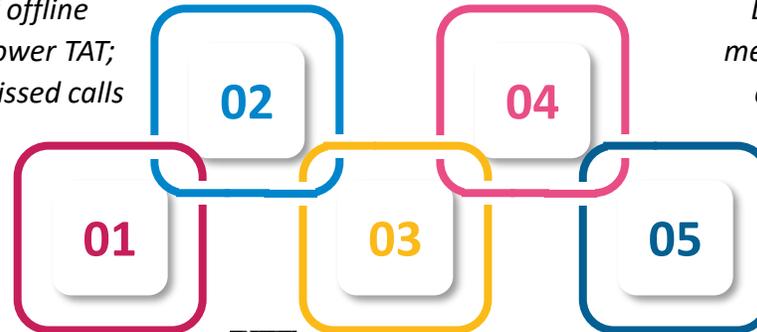
CRM

360° patient view; omni-channel interface; real time lead visibility; better lead management



Business Intelligence

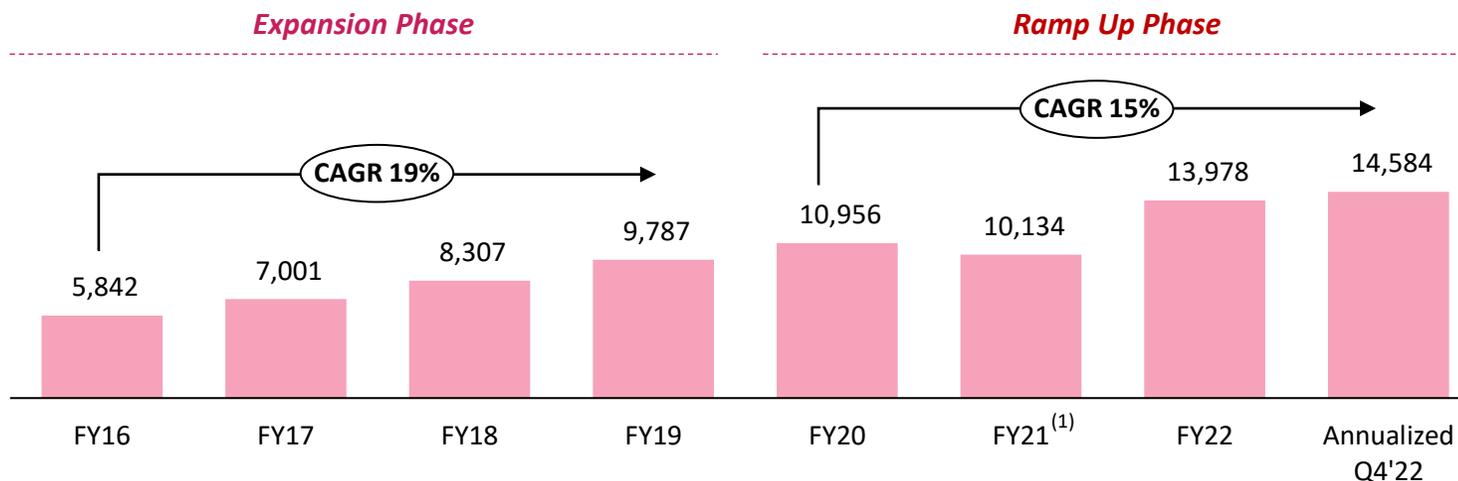
Unified single data repository; analytical models; real time insights into the business





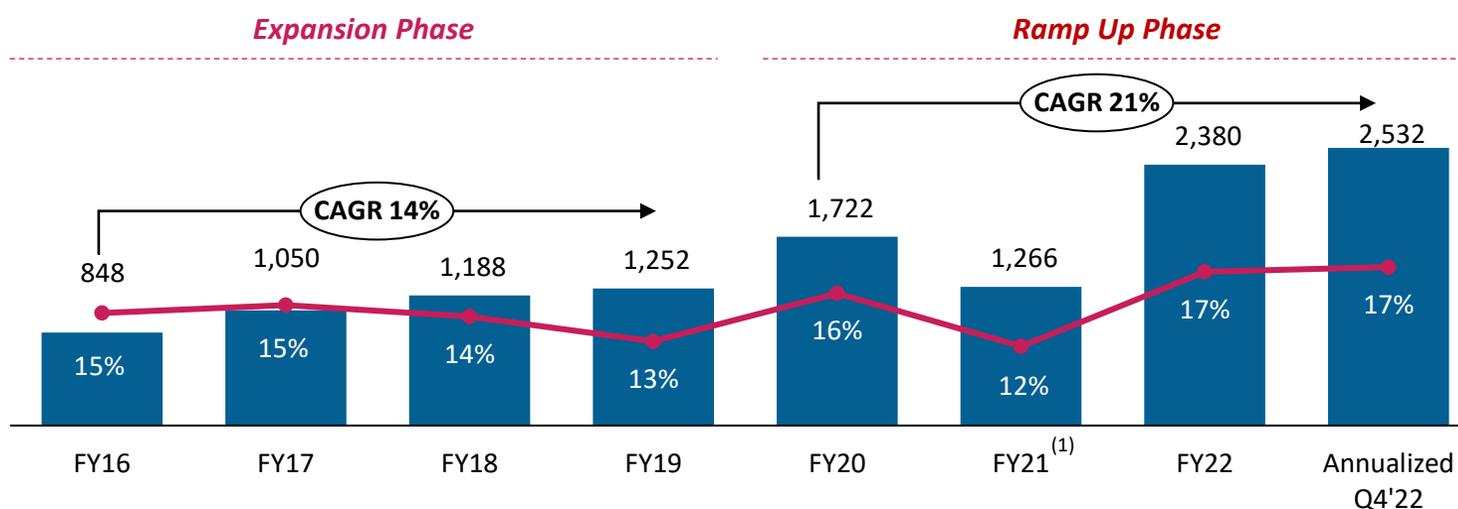
Proven Track Record of Outperforming the Industry

Revenue
(INR mn)



- Consistently upward revenue trajectory
- Expansion mode by setting up new cancer centres till FY19 to achieve large scale
- Demonstrated high growth post Covid across centres

EBITDA⁽²⁾
(INR mn)



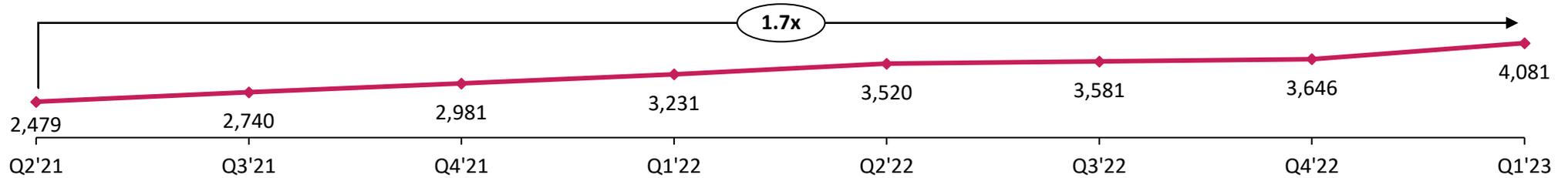
- Strong improvement in profitability
- Subdued in expansion phase due to setting up new centres
- Significant scale benefits; outpacing revenue due to operating leverage

(1) FY21 and H1'22 impacted due to covid-related headwinds
 (2) EBITDA, post-corporate expenses. EBITDA for FY20-FY22 is after IND AS 116 adjustments

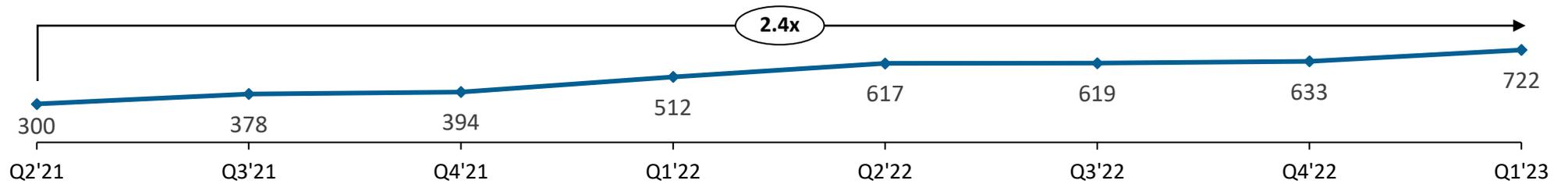


Improved Performance Leading to Profitability

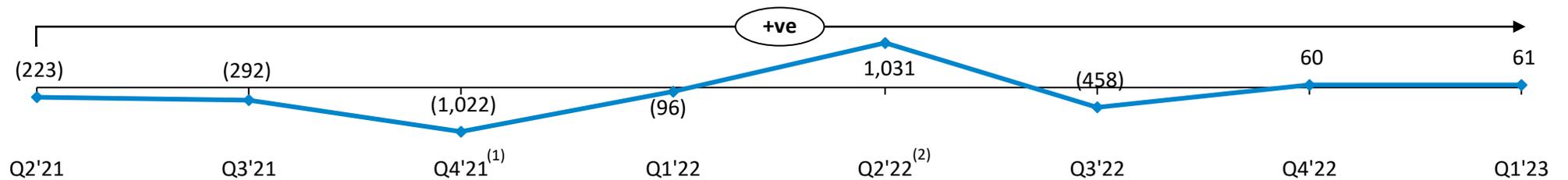
Revenue
(INR mn)



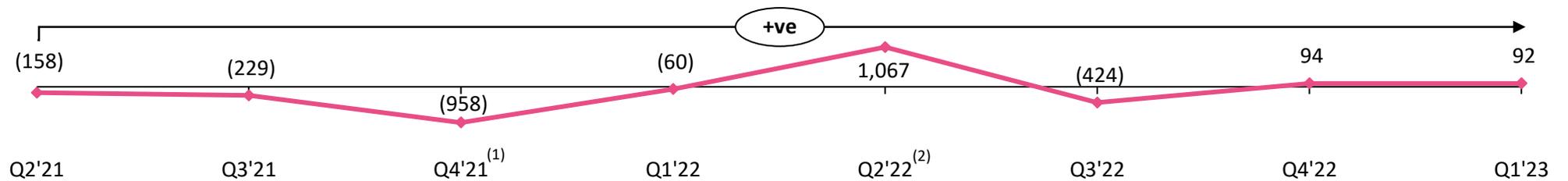
EBITDA
(INR mn)



PAT
(INR mn)
(Post IND-AS 116)



PAT
(INR mn)
(Pre IND-AS 116)



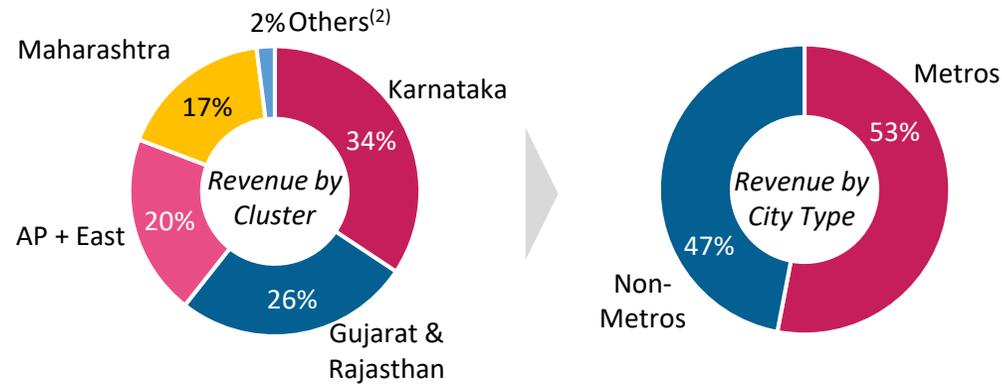
(1) Includes loss due to exceptional items of INR 847 mn

(2) Includes gain on exceptional items of INR 1,401 mn

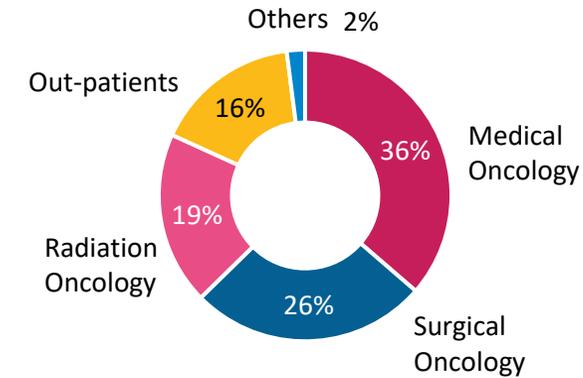


High Revenue Growth with Well-diversified Segments

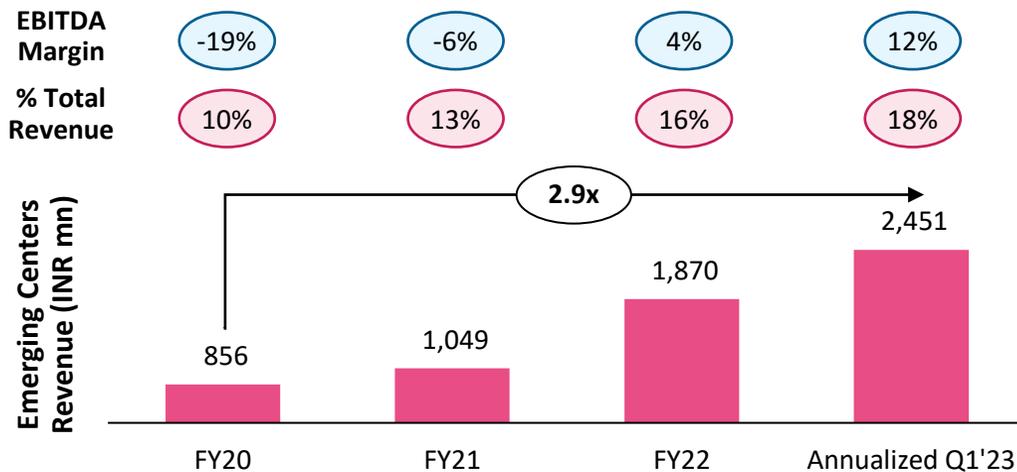
Expansive Geographical Presence⁽¹⁾



Diversified Revenue from Various Modalities⁽¹⁾



Emerging Center Turnaround



-  **Ramp Up of Emerging Centers:** Revenue contribution by Emerging Centers increasing consistently
-  **Low Geographical Risk:** Diverse geographical spread reducing revenue concentration and dependence
-  **Multi-Modality:** Revenues spread across modalities reducing concentration risk further
-  **Not Constrained by Beds:** c.74% revenue not dependent on in-patient beds due to heterogenous mix of treatments

(1) For Q1'23; (2) Includes Chennai and Kenya



Strong Operating Metrics with Significant Capacity Headroom

| Key Driver | Metric Indicator | % Revenue | Q1'22 | Q4'22 | Q1'23 |
|---|---|--------------------|-------|-------|-------|
| # New Registrations ('000) | Lead indicator of Volume Growth ; key operating metric tracked by HCG; has correlation to out-patient revenue | 20% ⁽¹⁾ | 14 | 18 | 20 |
| Chemo Sessions Administered ('000) | Key indicator for Medical Oncology ; procedures are primarily day care oriented with no capacity constraint | 35% | 23 | 28 | 31 |
| LINAC - Capacity Utilization ⁽²⁾ | Key indicator for Radiation Oncology ; availability of LINACs is the only capacity constraint ; further augmenting capacity by 20% | 20% | 53% | 60% | 68% |
| In-Patient Bed Occupancy ⁽³⁾ | Indicator for Surgical Oncology ; with decreasing ALOS and flexibility to add balance non-operational capacity beds, not a capacity constraint operationally ; additional 195 beds available to be made operational | 25% | 50% | 54% | 61% |

(1) Revenue % for out-patient and others only; (2) Total radiation patients treated stands at c. 5,000 in Q1'23; (3) Total in-patient bed capacity for oncology is 1,372 beds and operational beds is 1,177. This excludes 279 day care beds and 328 multispecialty beds



Well Poised to Outpace Industry Growth

Visible growth opportunities supported by proven brand-driven play, professional approach and ready capacity

| | | | |
|---|--|--|---|
| A Consistent Growth in Existing Business | Demand Driven | <ul style="list-style-type: none"> Strong growth across regions aided by market leadership and high incidence growth Existing facilities have significant capacity to support the growth | Strong business and returns profile with deeper market penetration |
| | Digital Transformation | <ul style="list-style-type: none"> Management led initiatives to boost digital presence and integrate end-to-end patient engagement; driving higher growth and better realizations | |
| | International Medical Tourism | <ul style="list-style-type: none"> Focus on expanding international presence and increasing revenue share in attractive geographies | |
| B Brownfield / Greenfield Expansion | <ul style="list-style-type: none"> 6 LINACs in pipeline (own + pay per use) over next 1-2 years to augment capacity in high growth regions Ongoing greenfield expansion at Ahmedabad and Bangalore by adding 125 beds cumulatively | | |

At the right inflection point to scale-up through additional business adjacencies

| | | |
|--|---|-------------------------------------|
| C Inorganic Expansion | <ul style="list-style-type: none"> Playbook of making smart acquisitions and driving sustained growth post integration - only realistic buyer for standalone cancer hospitals in India; successful track record of acquiring and scaling hospitals | Potential incremental growth |
| D Clinical Trials & Diagnostics⁽¹⁾ | <ul style="list-style-type: none"> Very low existing scale with 3-4 years of experience; finalizing business plans for significant expansion Capital adjacent opportunity; high potential to expand EBITDA without significant capex | |

Capital Light Capital Led

(1) While clinical trials and diagnostics are existing business lines, the company has not invested in the same in the last 3-4 years. The management plans to prudently invest to grow these businesses going forward



Successful Playbook of Smart Acquisitions and Driving Sustained Growth Post Integration

Time tested and highly replicable model of consistent revenue growth and profitability across geographies



HCG Ahmedabad (Metro City)

Acquisition Year



2013⁽¹⁾

Revenue CAGR⁽²⁾



c. 22%

Margin Expansion⁽²⁾



> 1,000 bps

Key Interventions



Scaled and maintaining #1 market position for over 5 years

Substantially developed clinical expertise and technology to transform into regional CoE



HCG Cuttack (Non-metro City)

2008

c. 38%

> 1,000 bps

Significantly upgraded technology far superior to the market

Deep penetration into large untapped catchment ensuring continuing 1st mover advantage

(1) HMS (multispecialty) was acquired in 2007 but the comprehensive cancer care unit – HCC was demerged in 2013; (2) Till FY22



Platform for Attractive Returns with Efficient Capital Allocation and Asset Light Expansion

ROCE breakup from Cancer Centers

| Vintage | Pre-Corp. | Post-Corp. |
|---------------------|-----------|------------|
| Established Centers | 24% | 19% |
| Emerging Centers | (3%) | (6%) |

11%

ROCE Q1'23

High growth potential in current business aided by sufficient capacity headroom

Ongoing value creation projects in digitalization and cost optimization measures

Emerging centers to ramp up to full potential

Capital efficient growth driven by expansion in clinical trials and diagnostics

Asset light expansion through day care beds, hub & spoke operations and pay per use for equipment

Margin expansion due to operating leverage

18-20%

Medium-term ROCE Target



HCG: Unique Long-term Value Creation Opportunity in Single Specialty Healthcare

1

Market leadership in high growth industry

- 33+ years of patient trust
- India's largest oncology player
- Under-coverage in cancer care
- Differentiated services with rapidly evolving technology

2

Integrated cancer care for patient retention

- Only Indian integrated cancer care chain
- Superior patient outcomes with top-of-the-mind brand recall
- Cancer care is a lifetime association
- Potential risk for patient families

3

High entry barriers for differentiated care

- Specialized technical knowledge
- Rapidly evolving expensive technology
- Hub and spoke model –high patient volume
- Largest oncologist network with high doctor retention

4

Profitable scalable business model

- Historically superior patient outcomes
- Proven scalable model – strong operational KPIs
- Advanced treatments with high realizations
- Cost optimization in progress

5

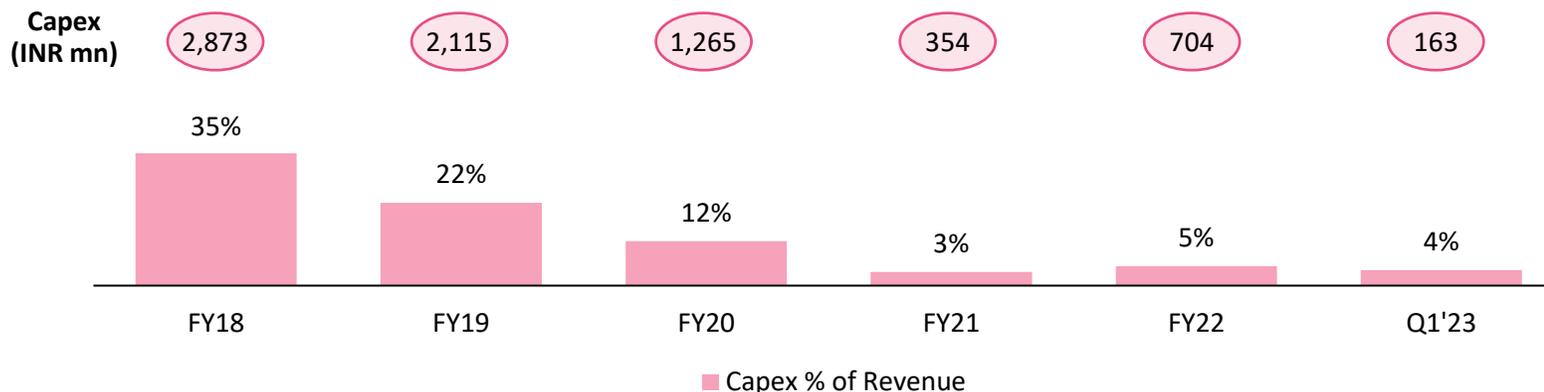
Poised for high growth with limited capex

- Turnaround in emerging centers
- High-capacity headroom
- Asset Light expansion
- Ongoing digital transformation and marketing initiatives



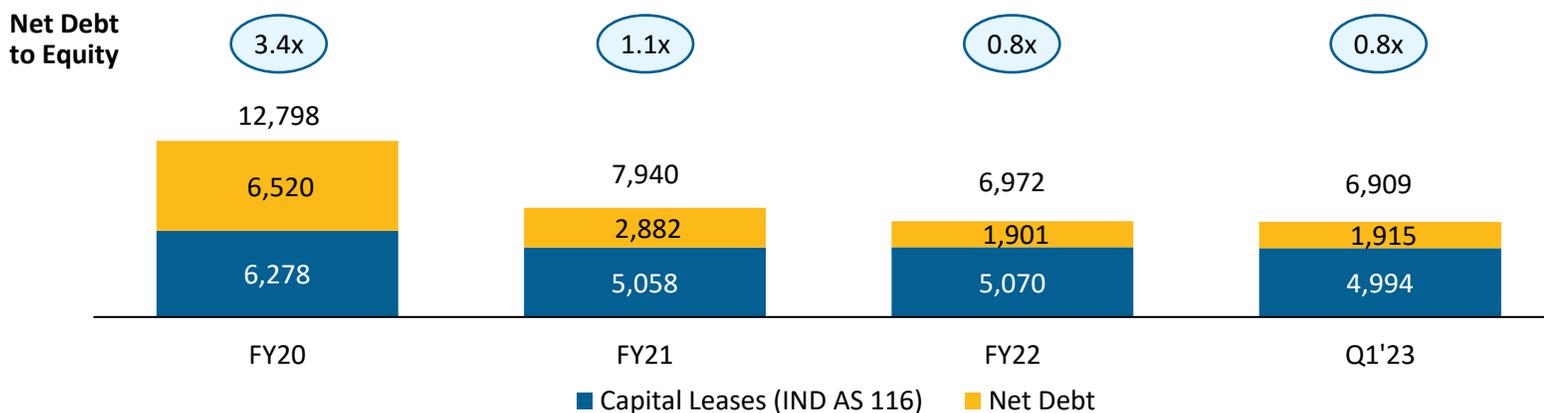
Strong Financial Profile with Low Leverage and Reduced Capex Needs

Capex (INR mn)



- Low future capex requirements
- Focus on optimizing existing infra and brownfield projects
- Ongoing capex for two greenfield expansions - INR 186 mn (balance in FY23) and INR 836 mn (FY24)

Net Debt (INR mn)



- Significant deleveraging in the past few years
- Comfortable debt position with well capitalized balance sheet



APPENDIX



Vision, Mission and Values



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

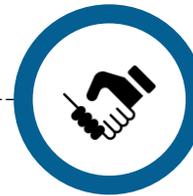


VALUES



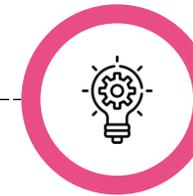
Quality

Enabling patients to achieve better lives



Collaboration

Limitless possibilities of collaborative energy and teamwork



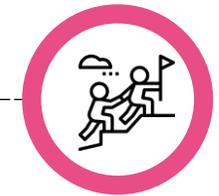
Innovation

Innovative ways to ensure better medical outcomes



Integrity

We are honest, forthright and are responsible corporate citizens



Leadership

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



Select Awards and Accreditations

Leading Oncology Brand with Industry Wide Recognition in 2020-21

Leader in Oncology

All India Critical Care Hospital Ranking Survey 2020 – HCG Bangalore



Best Cancer Care Hospital Chain

Navbharat Healthcare Award - HCG Mumbai & Nagpur

Top Specialized – Best Hospitals

HCG Ahmedabad has been listed by The News Week



Nursing Excellence

Association of Healthcare Providers - India (AHPI) Award

Best Cancer Hospital Group

Best Cancer Hospital – HCG Andhra Pradesh
Center of Excellence for Oncology – HCG, Kolkata



Ranked 1st

Ranked 1st by All India Critical Care Hospital Ranking Survey

Accreditations





Setting Standards in ESG for conserving Natural Capital

Pioneer among hospitals to adopt Integrated Reporting (IR) Framework in FY19, with disclosures covering performance against Financial, Manufactured, Social, Intellectual, Natural & Human Capital

Key Practices for Environment Conservation



Implementing ESG policy and standards



Assessing the impact of operations on the environment



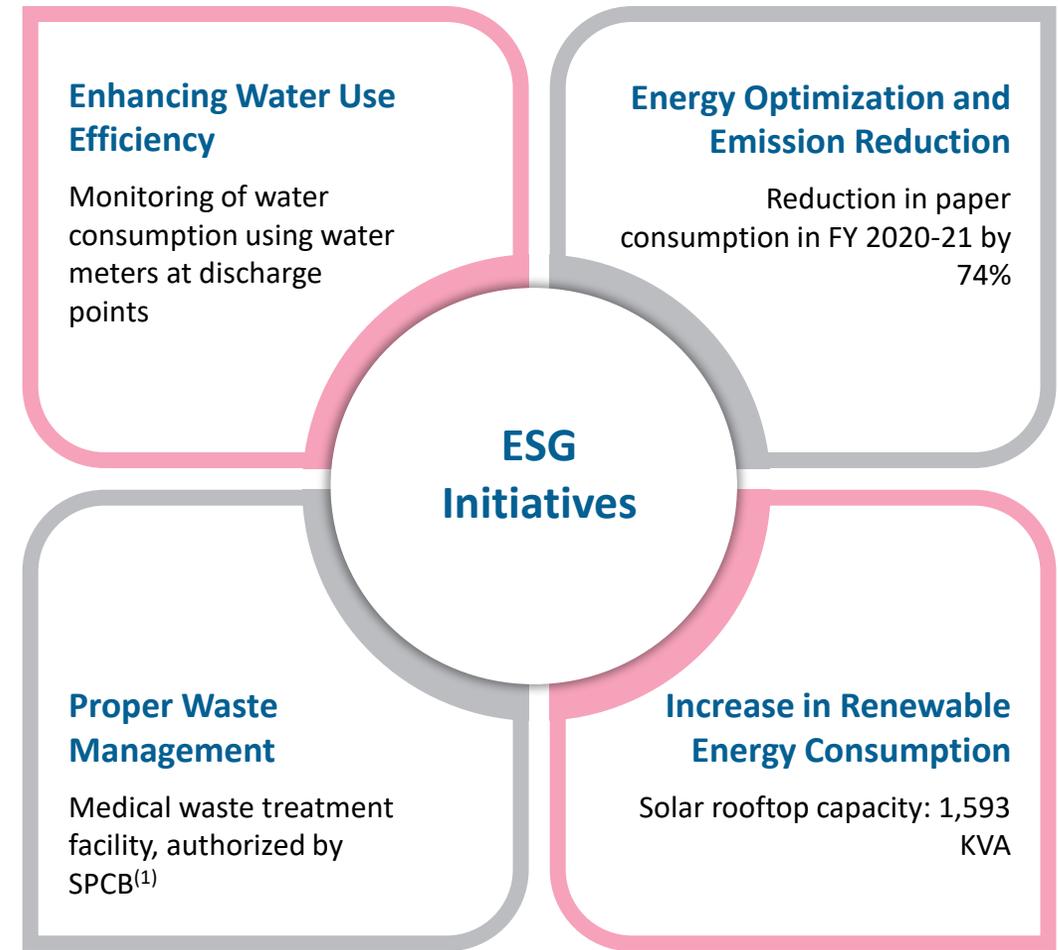
Raising awareness and initiating behavioral changes



Auditing community contributions & sustainability



Reviewing progress and evaluating the environmental management system, as and when needed





Enduring Patient Trust for 33+ Years



INTEGRATED CARE



"We're getting treated in this hospital for last 4 months. Radiation, surgery & now chemo treatment is going on. We're satisfied with all the services and treatments"

-Krishna Murthy



MANAGING COMPLEX CASES



"Almost every institute gave up. Finally, HCG made it happen and I Couldn't be happier! It's been 8 years now and I'm living a normal life"

-Savita Devi



PERSONALIZED PATIENT-CENTRIC



"Each member of the staff, right from the doctors to the cleaning staff have gone out of their way to help my husband in every possible way"

-Rose Pani



MODALITY SPECIALISTS



"My son was diagnosed with Lymphoblastic Leukemia. HCG assured us that our son's condition was curable with proper treatment and care. With each passing day, my son is doing better."

-Heeramani Mohanta



TECHNOLOGY LEADERSHIP



"The vast knowledge and expertise of the doctors gave me and my family enormous confidence to go ahead with the Cyberknife treatment. I am thankful to HCG for saving my life"

-Harshana Rajani



THANK YOU

Company: HealthCare Global Enterprises Limited



CIN: L15200KA1998PLC023489

For updates and specific queries, please visit
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