



Medical Devices

Roadmap and Investments



Jyotirmay Datta
Business Head

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β E I N G #1

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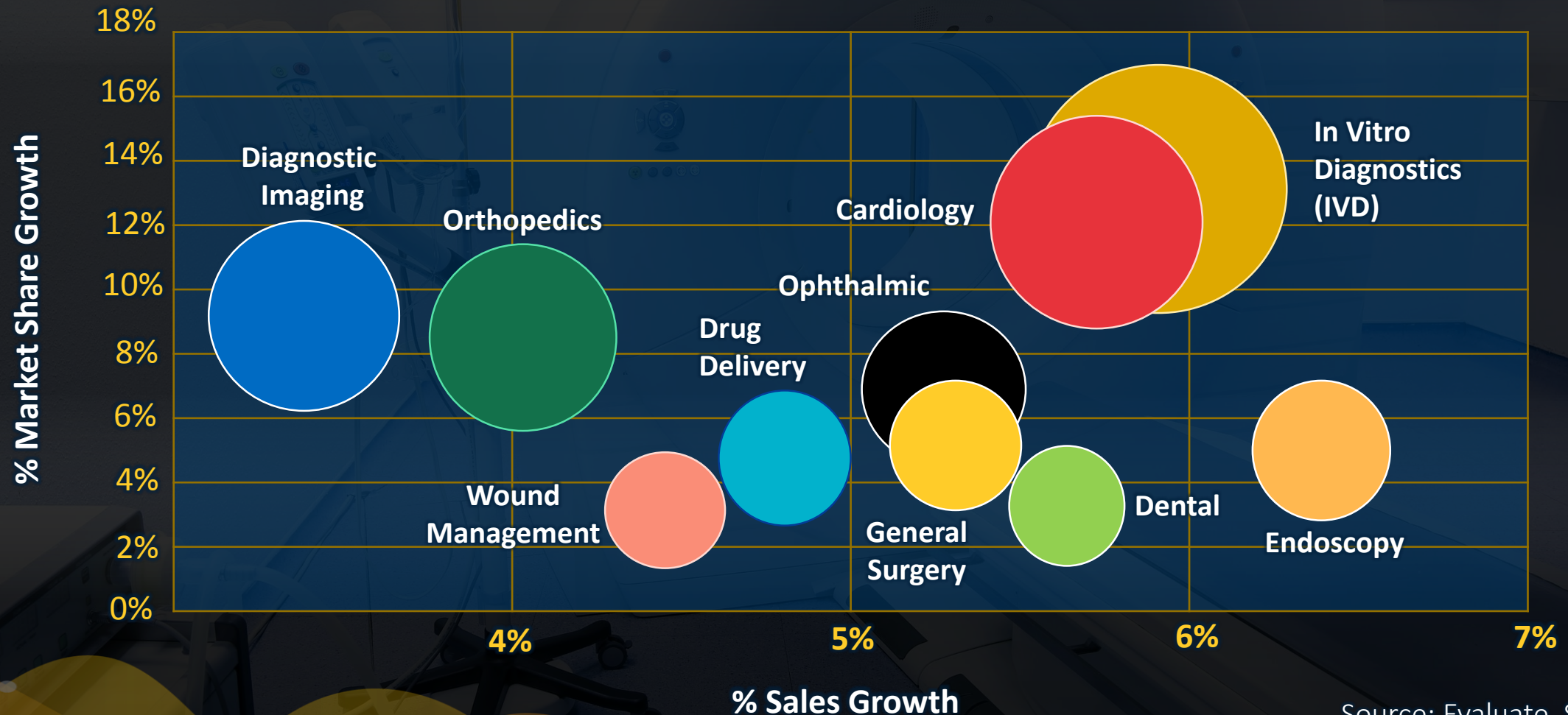
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Medical Devices Market growing @ 5%

Top 10 Device Areas by 2022



Source: Evaluate, Sep 2017
Note: Size of Bubble = WW Sales in 2022

Our Segments



In Vitro Diagnostic



Diagnostic Imaging



Digital Health



Surgical



Orthopedic

New Product
Development

VAVE

Manufacturing
Engineering

Digital Health

IoT

Regulatory

Added 10 new customers in last 2 years

DIAGNOSTIC IMAGING



New Product Dev Ultrasound Scanner

INNOVATION

- Ultrasound Image and ECG waveforms displayed on a single screen
- A magic button in the user interface screen to restore the Image Settings in real time
- Scalable design to accommodate 64 and 128 channel beamformer

BENEFITS

- Development in 2 yrs from start to finish
- Challenges related to product launch delays mitigated
- Development at a much reduced cost

DOMAIN EXPERTISE

- Imaging, DICOM, PACS and EMR
- Algorithms for calculating heartrate, expected date of child delivery, kidney stone size
- Image acquisition, processing and rendering solutions

IN VITRO DIAGNOSTIC



Chemistry Analyzer for Emerging Market

Measuring biomolecules present in Urine, Blood and other Body Fluids

INNOVATION

- Meet target of 25% BOM cost reduction than comparable imported products
- Design optimization hw and mechanical
- Design cycle time reduced by Model Based Design

DOMAIN EXPERTISE

- Domain knowledge in microfluidics, optics, robotics and thermal management

BENEFITS

- Met the cost reduction target
- Project to be completed in 18 months compared to 24-30 months usual development life cycle

DIGITAL HEALTH



Smart Inhaler for Asthma and COPD patients

INNOVATION

- IoT enabled smart device
- Monitor and diagnose patients remotely
- Alerts/Notification for dosage monitoring

DOMAIN EXPERTISE

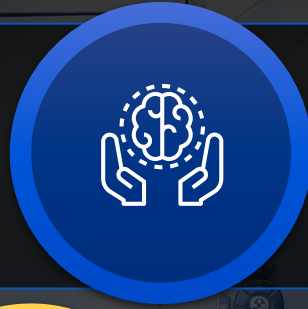
- Complete integration of sensors, connectivity, cloud, mobility
- Development on IOS and Android platform
- Regulatory Documentation, Testing and Labelling

BENEFITS

- Improve medication adherence of patients
- Reduce treatment costs
- Reduce emergency room visits

Our Value Proposition

Our Heritage



Core knowledge drawn from **25+ years** of L&T's experience

Innovation



60+ patents generated for clients

Investment In Infrastructure



Diagnostic Lab



Dry Lab



Wet Lab

Regulatory Knowledge

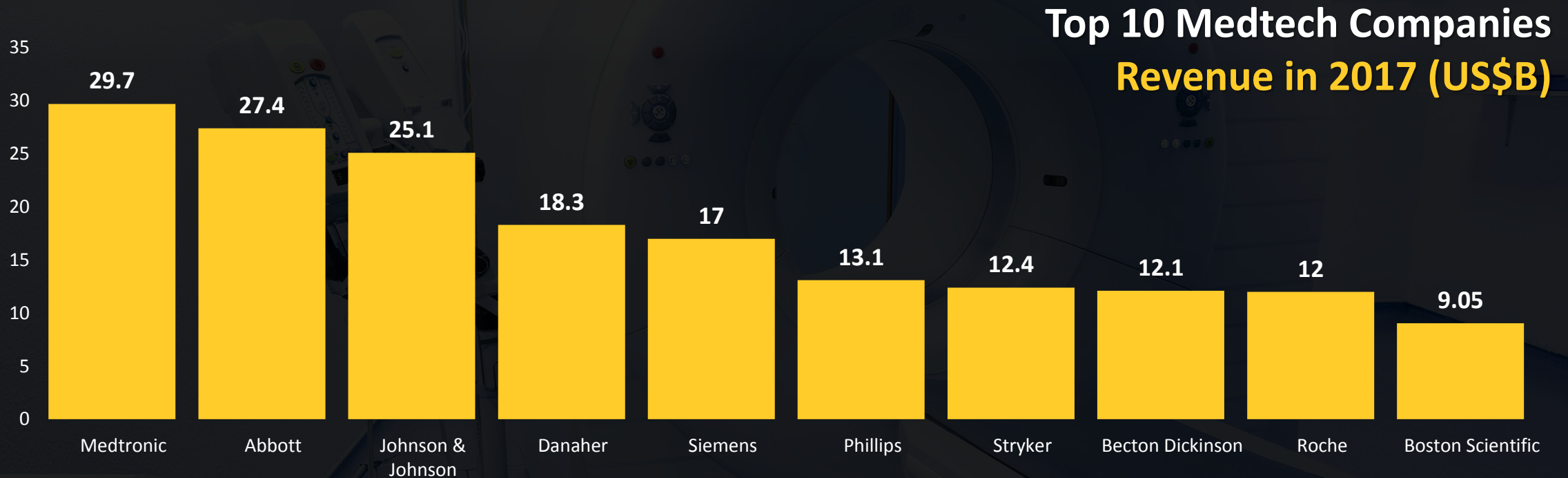


FDA Class I, II & III

MDR Class I, IIa, IIb and III

With our presence in 5 out of top 10 Medical Devices companies...

... and leveraging our domain knowledge, we are building lasting relations



Strong Domain Knowledge



Diagnostic Imaging



Digital Health



In Vitro Diagnostic

Moderate Domain Knowledge



Orthopedic



Surgical

Foundation for a Lasting Relationship

- VAVE for CIJ Products
- NPD for Molecular diagnostic
- Tissue stainers



2014

100+

Engineers

2015



- Development for CIJ, LASER & TTO
- NPD for lab automation systems
- Microscopy application

- VAVE for Gamma Detection Systems
- Imaging solution for microscopes
- MOL for CIJ



2016

2017



- Reliability engineering for haematology
- Algorithm development for cell counter and viability analyser
- Design of SUT Biocantainers

- Next Gen Platform for digital finishing
- Advanced technology development for Biopharma products



2018

250+

Engineers

Diagnostics | Lifesciences | Dental



Dedicated Lab

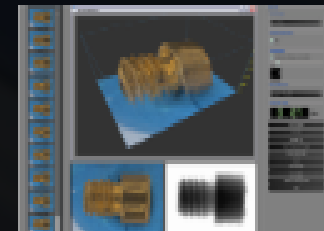
4 Customer Specific Labs



Dedicated Lab

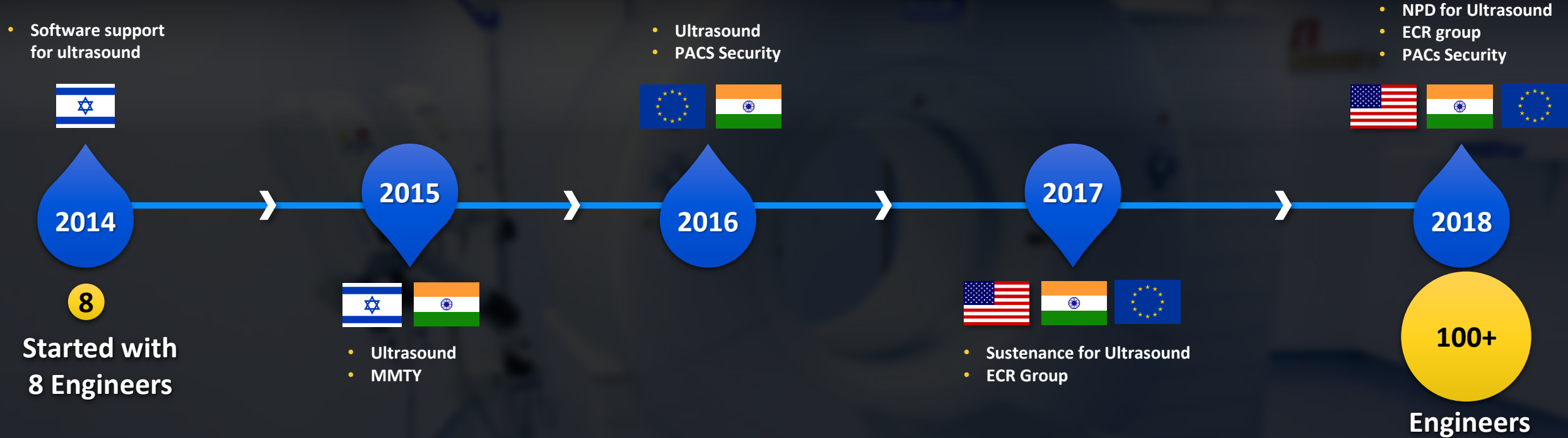


- 16 Patents filed
- 10+ new products
- \$13M+ savings thru VAVE in 3 years



- NPD | Value Eng | Sustaining
- Reliability Engineering
- Manufacturing Engineering

Foundation for a Lasting Relationship



ECR

HRC

CT

MR

Invivo

Ultrasound

- NPD | Value Eng | Sustaining
- Regulatory
- Supplier Engineering
- Manufacturing Engineering

Trends impacting the Medtech industry...

Digital



Shift to Homecare



Combination Products



Servitization

Our Strength

- Digital Assets: AIKno, UBIQWeise
- Sensors, Connectivity, Cloud, Mobility, Analytics, UI/UX
- Across other Verticals

Regulatory

Impact of EU – MDR / IVDR Regulations

On WU Medtech eco-system until end of 2020

Incremental
Operation Costs

USD 18.8 Bn

Incremental Need
of GA Experts

FTE 31,500

Average Bottom-
Line Impact

-4%

Our Strength

- Well Versed with Regulations and Compliance – US FDA, EU MDD
- Knowledge of Product Launch, Remediation, Risk Management

Emerging Market



Growing at ~9%, 2x compared to ROW



Low cost competition

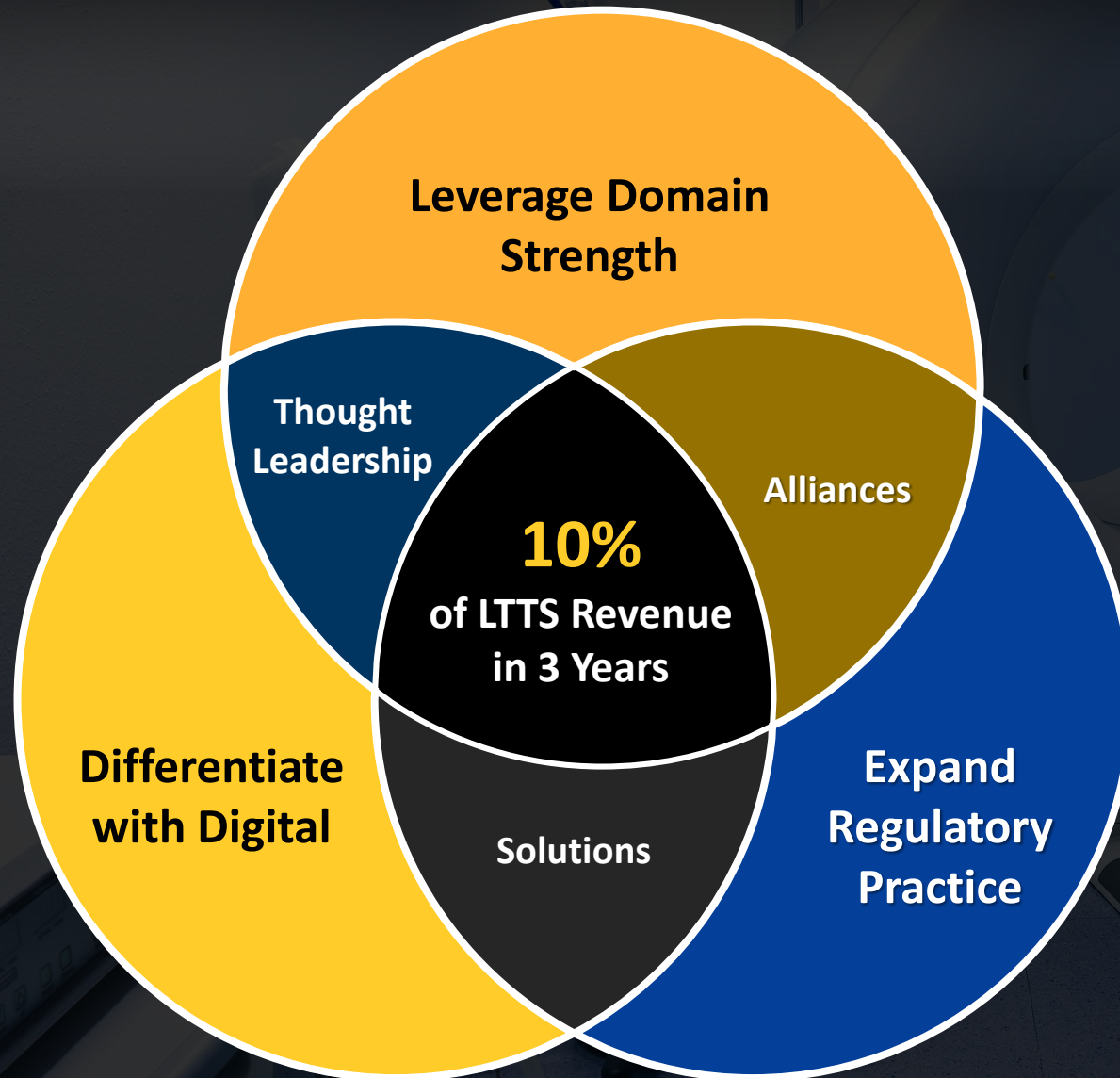


Large Value Segment

Our Strength

- Experience in frugal engineering
- Knowledge of the Healthcare ecosystem

Roadmap for FY21...



**Youngest Vertical today
(6% of LTTS revenue), but
the **top “growth driver”**
for years to come...**



Thank You