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*Total Sales Audit is the stockiest sell out to retail and hospital pharmacies along with dispensing doctors. This does not cover direct sales by manufacturer and tender.”*

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**Domestic Sales - Value, Growth and CAGR**

Value (INR Billion)

Company	Domestic Sales in FY20 (INR Billion)	Domestic Sales in FY22 (INR Billion)	CAGR (FY20-22)	Ratio of Mankind CAGR vs IPM CAGR (FY20-22)
IPM	1,503.47	1,854.98	11.08%	
Mankind	60.65	82.20	16.42%	1.48

**Revenue as % of IPM**

Company	FY12	FY20	FY22	Incremental MS% (FY20-22)	Rank of Incremental MS% amongst Top 10 Corporates (FY20-22)
Mankind	3.27%	4.03%	4.43%	0.40%	1

**Top 10 Corporates and Peers - Domestic Sales CAGR and Incremental Market Share**

Company	CAGR (FY20-22)	Incremental MS% (FY20-22)
Corp 1	10.31%	-
Corp 2	8.52%	-
Corp 3	11.65%	-
Mankind	16.42%	0.40%
Corp 4	13.16%	-
Corp 5	9.38%	-
Corp 6	11.57%	-
Corp 7	11.89%	-
Corp 8	9.50%	-
Corp 9	15.05%	-
<b>Average of top 10 corporates excluding Mankind</b>	10.94%	-0.01%

**Average of the 10 Peers - Domestic Sales CAGR and Incremental Market Share**

<b>Average of the 10 peers</b>	10.55%	-0.04%
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Source:

IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)

IQVIA TSA MAT March 2014 Dataset for India (For FY12)

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## Value Rank in IPM

Company	FY12	FY22
Mankind	8	4

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

*IQVIA TSA MAT March 2014 Dataset for India (For FY12)*

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### Market share and Rank in Covered Market/s

Company	Market Share (FY22)	Rank (FY22)
Mankind	6.89%	2

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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**Mankind domestic sales and market share across key therapy areas in IPM and CAGR**

S. No.	Therapy Area	Mankind Domestic Sales in FY22 (INR Million)	Market Share (FY22)	Mankind Sales CAGR (FY20-22)	IPM Sales CAGR (FY20-22)	% of total Domestic Sales for Mankind
1	Cardiac	9,948	4.5%	19.31%	11.59%	12.10%
2	Anti-Infectives	12,224	5.6%	12.48%	9.12%	14.87%
3	Gastro Intestinal	9,015	4.8%	13.69%	11.56%	10.97%
4	Anti Diabetic	6,765	4.0%	21.54%	7.93%	8.23%
5	Respiratory	7,822	4.8%	24.07%	14.95%	9.52%
6	Vitamins/Minerals/Nutrients	7,912	5.2%	17.12%	13.38%	9.63%
7	Pain / Analgesics	4,453	3.2%	8.54%	9.99%	5.42%
8	Derma	6,121	4.7%	9.75%	7.63%	7.45%
9	Neuro / CNS	2,417	2.3%	17.47%	10.36%	2.94%
10	Gynaecology	5,489	6.2%	33.09%	9.38%	6.68%
11	Others	10,032		12.83%	13.76%	12.20%
	<b>Total</b>	<b>82,198</b>		<b>16.42%</b>	<b>11.08%</b>	<b>100.00%</b>

Source:

IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)

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**Mankind's key brands across key therapy areas - Subgroups, domestic sales, rank and market share**

**Anti-Infectives**

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Moxikind-CV	Amoxicillin	J01C0G AMOXY. & CLAV. SOLIDS	2,801.20	3	10.18%
		J01C0H AMOXY. & CLAV. LIQUIDS			
		J01C0I AMOXY. & CLAV. INJECT.			
Gudcef	Cefpodoxime	J01D0V CEFPODOXIME SOLIDS	1,586.69	2	13.42%
		J01D0W CEFPODOXIME LIQUIDS			
Gudcef-CV	Cefpodoxime	J01D0N CEFPOD. + CLAV. SOLIDS	946.57	1	15.63%
		J01D0Q CEFPOD. + CLAV. LIQUIDS			
Mahacef	Cefixime	J01D0C CEFTRIAXONE INJECTABLES	755.52	7	2.83%
		J01D0L CEFIXIME ORAL SOL.			
		J01D0M CEFIXIME ORAL LIQ.			
Cefakind	Cefuroxime	J01D0I CEFUROXIME ORAL SOLIDS	1,049.61	2	12.29%
		J01D0K CEFUROXIME ORAL LIQUID			
Zady	Azithromycin	J01F04 AZITHROMYCIN ORAL SOLIDS	777.74	4	4.73%
		J01F05 AZITHROMYCIN ORAL LIQUIDS			
		J01L0C OFLOXACIN ORAL SOLIDS			

Zenflox	Ofloxacin	J01L0D OFLOXACIN ORAL LIQUIDS	519.42	4	14.36%
		J01L0E OFLOXACIN INJECTABLES			
		S01A08 OFLOXACIN			

### Cardiovascular

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Amlokind	Amlodipine	C01D03 AMLODIPINE	488.90	4	10.88%
Amlokind-AT	Amlodipine	C02F02 ATENOLOL+AMLODIPI NE	1,809.85	1	28.95%
Telmikind	Telmisartan	C02C04 TELMISARTAN	1,014.81	2	10.25%
Telmikind-H	Telmisartan	C02G0H TELMISARTAN + HCT	1,032.88	2	14.02%
Telmikind-AM	Telmisartan	C02F06 AMLODIPINE+TELMISA RTAN	882.36	2	10.96%

### Gastrointestinal

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Nurokind-LC	Mecobal	A16A01 LEVOCARNITINE	1,190.97	1	51.59%
		A16A02 FOLIC+LEVOCARNIT+ MECOBAL			
Vomikind	Ondansetron	A04C04 ONDANSETRON ORAL SOL.	896.96	3	20.25%
		A04D04 ONDANSETRON LIQ.			
		A04E03 ONDANSETRON INJ.			
Rabekind-DSR	Rabeprazole	A02B0R RABEPRA.+ DOMPERID.	443.12	8	3.97%
Pantakind-DSR	Pantoprazole	A02B0Q PANTOPR.+ DOMPERID.	422.95	6	3.03%



ZenfloX-OZ	Ofloxacin	A07G05 OFLOXACIN+ORNIDAZ OL.SOL	404.79	1	19.21%
		A07G06 OFLOXACIN+ORNIDAZ OL.LIQ			
		A07G08 OFLOXACIN+ORNIDAZ OLE INJ.			

### VMN

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Nurokind Gold	Mecobalamin combination	A11A04 OTH. MULTIVIT. MIN. SOLIDS	1,315.78	1	14.83%
		A11F02 MECOBALAMIN COMB.			
		A16A09 OTH.ALIMENT.&METAB OL. PRODS			
Nurokind Plus-RF	Mecobalamin combination	A11F02 MECOBALAMIN COMB.	1,191.29	1	10.42%
		A11F03 FOLIC+MECOBA+VIT.B 6+THIOCTIC			
Health OK	Multivitamin	A11A05 OTH. MULTIVIT. MIN. LIQUIDS	859.02	5	3.39%
		V06E01 FOOD SUPPLEMENTS			
Nurokind	Mecobalamin combination	A11A05 OTH. MULTIVIT. MIN. LIQUIDS	581.53	6	2.29%
		A11F01 MECOBALAMIN			
Argipreg	L-arginine	V06D09 OTHER NUTRIENTS	546.47	1	18.91%

### Respiratory

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Codistar	Codeine	R05B03 CODEINE AND COMB.	1,404.54	2	23.13%
Asthakind	Bromhexine, guaifenesin and terbutaline	R05B01 COUGH PREP. ETHICALS	569.42	11	2.03%
Asthakind-DX	Dextromethorphan	R05B01 COUGH PREP. ETHICALS	1,109.26	8	3.96%
Asthakind-LS	Levosalbutamol	R05B05 LEVOSALBUTAMOL & COMB.	400.03	5	4.95%
Monticope	Montelukast	R03B01 LEVOCETIRIZ.+MONTE LU SOLD R03B03 LEVOCETIRIZ.+MONTE LU LIQ	1,033.01	3	7.48%

#### Anti-Diabetic

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Glimestar-M	Glimepiride	A10B0Q GLIMEPIRIDE+METFORM.	1,556.55	6	5.29%
Glimestar-PM	Glimepiride	A10B0W PIOGLITAZ.+METFORM.+GLIM.	741.46	1	10.73%
Dynaglipt-M	Teneligliptin	A10B0O METFORMIN + TENELIGLIPTIN	634.79	2	9.70%
Glizid-M	Gliclazide	A10B0M GLICLAZIDE + METFORMIN	603.98	2	13.02%
Dynaglipt	Teneligliptin	A10B0F TENELIGLIPTIN	419.67	1	10.96%
Voglistar GM	Voglibose	A10B0B GLIMEPIRIDE+METFORM.+VOGLIB	412.74	6	3.99%

#### Derma

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Candiforce	Itraconazole	D01C03 ITRACONAZOLE	1,681.96	1	19.14%
AcneStar	Clindamycin	D10A01 BENZOYL PEROXIDE	561.31	1	10.47%
		D10A08 ISOTRETINOIN SOLIDS			
		D10A0A CLINDAMYCIN+NICOTI NAMID			
		D10A0V OTHER ANTIACNE PREP.			
Terbinaforce	Terbinafine	D01A0A TERBINAFINE D01C05 TERBINAFINE	451.00	1	22.52%

### Gynaecology

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Unwanted Kit	Mifepristone and misoprostol	G03K02 MIFEPRISTONE+MISOP RSTOL	1,802.91	1	44.25%
Dydroboon	Dydrogesterone	G03D04 DYDROGESTERONE	1,496.02	2	24.59%
Unwanted-72	Levonorgestrel	G03A05 LEVONORGESTREL	904.06	1	59.20%

### Pain / Analgesics

Brand	Molecule	Subgroups	Domestic Sales in FY22 (INR Million)	Rank based on Domestic Sales in FY22	Market share in FY22
Caldikind Plus	Calcitriol	M05C02 CALCITRIOL COMB.	668.80	3	8.48%
Dolokind Plus	Aceclofenac	M01A0U ACECLOFENAC + PARACETAMOL	286.46	3	5.84%
Dolokind Aqua	Diclofenac	M01A03 DICLOFENAC INJECTABLES	244.85	5	4.62%

**Neuro / CNS**

<b>Brand</b>	<b>Molecule</b>	<b>Subgroups</b>	<b>Domestic Sales in FY22 (INR Million)</b>	<b>Rank based on Domestic Sales in FY22</b>	<b>Market share in FY22</b>
Placida	Flupenthixol and melitracen	N06A08 FLUPENTHIXOL + MELITRACEN	524.45	1	66.57%
Clonafit	Clonazepam	N03A0D CLONAZEPAM	284.42	4	12.36%
Clonafit Plus	Clonazepam	N06C02 ESCITALOPRAM+CLON AZEPAM	261.41	5	5.91%

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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### Therapy area wise rank in Covered Market/s

Therapy Area	Mankind's Rank in Therapy Area (Covered Market/s) in FY22
Cardiac	4
Anti-Infectives	4
Gastro Intestinal	4
Anti Diabetic	3
Respiratory	3
Vitamins/Minerals/Nutrients	1
Pain / Analgesics	6
Derma	2
Neuro / CNS	5
Gynaecology	2

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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**Acute Chronic - Value, % Contribution and CAGR - IPM and Mankind**

Value (INR Billion)

Company	Classification	FY20	FY21	FY22	CAGR (FY20-22)	Ratio of Mankind CAGR vs IPM CAGR (FY20-22)
IPM	Acute	950.64	968.57	1,178.92	11.36%	
	Chronic	552.83	600.30	676.06	10.59%	
	<b>Total</b>	<b>1,503.47</b>	<b>1,568.87</b>	<b>1,854.98</b>	<b>11.08%</b>	
Mankind	Acute	41.28	43.68	55.43	15.89%	1.40
	Chronic	19.37	22.46	26.76	17.55%	1.66
	<b>Total</b>	<b>60.65</b>	<b>66.14</b>	<b>82.20</b>	<b>16.42%</b>	

% Value Contribution

Company	Classification	FY18	FY20	FY21	FY22
Mankind	Acute	72.24%	68.06%	66.04%	67.44%
	Chronic	27.76%	31.94%	33.96%	32.56%

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

*IQVIA TSA MAT March 2020 Dataset for India (For FY18-19)*

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## Mankind's brands in the top 300 IPM brands by value and rank

Number of brands in the top 300 IPM brands by value

Company	# of brands in top 300 brands in IPM by value (FY22)
Mankind	18

Value (INR Million)

Mankind Brands	Domestic Sales in FY22 (INR Million)	Rank in IPM
Manforce (Rx)	2,932.21	42
Moxikind-CV	2,801.20	48
Amlokind-AT	1,809.85	103
Unwanted-Kit	1,802.91	104
Candiforce	1,681.96	116
Gudcef	1,586.69	132
Glimestar-M	1,556.55	138
Prega News	1,529.11	150
Dydroboon	1,496.02	153
Codistar	1,404.54	172
Nurokind-Gold	1,315.78	189
Nurokind Plus-RF	1,191.29	222
Nurokind-LC	1,190.97	223
Asthakind-DX	1,109.26	247
Cefakind	1,049.61	272
Monticope	1,033.01	275
Telmikind-H	1,032.88	276
Telmikind	1,014.81	282

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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**Brand cohorts by size for Mankind, identified peers and top 10 corporates**

Brand cohorts by size (INR 1 Billion + value) for Mankind and identified peers

<b>Company</b>	<b>Number of brands with INR 1 Billion + value (FY22)</b>
Peer 1	22
Peer 2	24
Peer 3	18
Mankind	18
Peer 4	17
Peer 5	12
Peer 6	7
Peer 7	14
Peer 8	3
Peer 9	1
Peer 10	5
Average number of brands exlcuding Mankind	12

Brand cohorts by size (INR 1 Billion + value) for Mankind and top 10 corporates

<b>Company</b>	<b>Number of brands with INR 1 Billion + value (FY22)</b>
Corp 1	22
Corp 2	24
Corp 3	18
Mankind	18
Corp 4	17
Corp 5	9
Corp 6	4
Corp 7	7
Corp 8	12
Corp 9	11
Average number of brands exlcuding Mankind	14

Brand cohorts by size (INR 500 Million + value) for Mankind

<b>Company</b>	<b>Number of brands with INR 0.5 Billion + value (FY22)</b>
Mankind	36

Source:

IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)

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**Top 20 brands of Mankind - Value sales, market share and rank in the respective subgroup**

Rank of Brand	Mankind Brands	Subgroup	Domestic Sales in FY22 (INR Million)	CAGR FY20-22	Value Contribution % in the Overall Subgroup (FY22)	Rank of Brand in the Respective Subgroup (FY22)
1	<b>Manforce (Rx)</b>	SILDENAFIL, DAPOXETINE + SILDENAFIL, LIDOCAINE + PRILOCAINE	2,932.21	10.02%	62.12%	1
2	<b>Moxikind-CV</b>	AMOXYCILLIN & CLAVULANIC SOLIDS,	2,801.20	7.53%	10.18%	3
3	<b>Amlokind-AT</b>	ATENOLOL+AMLODIPINE	1,809.85	13.43%	28.95%	1
4	<b>Unwanted-Kit (Rx)</b>	MIFEPRISTONE+MISOPROS TOL	1,802.91	18.63%	44.25%	1
5	<b>Candiforce</b>	ITRACONAZOLE	1,681.96	0.22%	18.03%	1
6	<b>Gudcef</b>	CEFPODOXIME SOLIDS, CEFPODOXIME LIQUIDS	1,586.69	16.40%	13.43%	2
7	<b>Glimestar-M</b>	GLIMEPIRIDE+METFORMIN	1,556.55	16.86%	5.29%	6
8	<b>Prega News</b>	PREGNANCY TEST	1,529.11	22.59%	80.09%	1
9	<b>Dydroboon</b>	DYDROGESTERONE	1,496.02	246.50%	24.59%	2
10	<b>Codistar</b>	CODEINE AND COMBINATIONS	1,404.54	50.03%	23.23%	2
11	<b>Nurokind-Gold</b>	MECOBALAMIN COMBINATIONS, OTHER ALIMENT.& METABOLICS	1,315.78	21.06%	14.83%	1
12	<b>Nurokind Plus-RF</b>	FOLIC ACID +METHYLCOBALAMIN	1,191.29	11.53%	10.42%	1
13	<b>Nurokind-LC</b>	FOLIC ACID + LEVOCARNITINE +	1,190.97	15.35%	51.59%	1
14	<b>Asthakind-DX</b>	COUGH PREPERATIONS ETHICALS	1,109.26	36.63%	3.87%	8
15	<b>Cefakind</b>	CEFUROXIME ORAL SOLIDS, CEFUROXIME	1,049.61	21.63%	12.18%	2
16	<b>Monticope</b>	LEVOCETIRIZINE + MONTELUKAST SOLIDS,	1,033.01	20.80%	7.48%	3
17	<b>Telmikind-H</b>	TELMISARTAN + HYDROCHLOROTHIAZIDE	1,032.88	12.90%	14.02%	2
18	<b>Telmikind</b>	TELMISARTAN	1,014.81	15.46%	10.25%	2
19	<b>Gudcef-CV</b>	CEFPODOXIME PROXETIL + CLAVULANIC ACID SOLIDS,	946.57	16.83%	15.63%	1
20	<b>Unwanted-72 (Rx)</b>	LEVONORGESTREL	904.06	15.63%	59.20%	1

Source:

IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)

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### Sales segmentation by Townclass - IPM and Mankind

Company	Townclass	Domestic Sales in FY22 (INR Billion)	CAGR (FY20-22)
IPM	Metro & Class I	62.76%	9.93%
	Class II To IV & Rural	37.24%	13.09%
	<b>Total</b>	<b>1,854.98</b>	<b>11.08%</b>
Mankind	Metro & Class I	52.76%	22.05%
	Class II To IV & Rural	47.24%	10.96%
	<b>Total</b>	<b>82.20</b>	<b>16.42%</b>

Source:

*IQVIA Townclass Audit MAT March 2022 Dataset for India (For FY20-22)*

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### Zone wise domestic sales and CAGR

<b>Zone</b>	<b>Mankind Domestic Sales in FY22 (INR Million)</b>	<b>Value Contribution % to Mankind's Sales (FY22)</b>	<b>Mankind Sales CAGR (FY20-22)</b>	<b>IPM Sales CAGR (FY20-22)</b>
East	15,659.04	19.05%	23.15%	12.05%
North	28,732.62	34.96%	19.34%	11.06%
South	19,069.83	23.20%	10.67%	11.15%
West	18,736.66	22.79%	13.37%	10.00%

Source:

*IQVIA Townclass Audit MAT March 2022 Dataset for India (For FY20-22)*

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## Medical Representatives of Mankind vs identified peers in IPM

Medical Representatives of Mankind vs identified peers in IPM

Company	# of MRs Range
Mankind	11,000 - 12,000

Within Mankind's peerset, most companies have less than 10,000 Medical Representatives (MR). Only 3 peers have more than 10,000 MRs, including Mankind

*Source:*

*Filings of annual reports made by the respective companies with stock exchanges; For Mankind, the data is based on the investor presentation made available by Mankind*

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### NLEM portfolio % exposure for IPM, Mankind and top 10 corporates

Company	% Exposure*
IPM	18.69%
Corp 1	16.32%
Corp 2	21.42%
Corp 3	27.50%
Mankind	13.41%
Corp 4	30.44%
Corp 5	15.52%
Corp 6	19.64%
Corp 7	23.90%
Corp 8	12.57%
Corp 9	29.80%

\*% Exposure is % of Total sales which is contributed by NLEM portfolio

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

<https://www.nhp.gov.in/NHPfiles/NLEM%2C%202015.pdf>

<https://main.mohfw.gov.in/sites/default/files/Recommendations.pdf>

<http://www.nppaindia.nic.in/wp-content/uploads/2020/03/1-1.pdf>

*Note: Tagging of Molecules for NLEM is not a part of standard IQVIA data and has been done on best effort basis using above mentioned sources*

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**Covered Market/s as % of IPM for Mankind and top 10 corporates**

<b>Company</b>	<b>Covered Market as % of IPM (Value) - FY22</b>
Corp 1	65.79%
Corp 2	64.39%
Corp 3	68.12%
Mankind	64.28%
Corp 4	63.25%
Corp 5	67.33%
Corp 6	68.19%
Corp 7	58.16%
Corp 8	51.24%
Corp 9	49.81%

**Covered Market/s as % of IPM for Mankind in FY20**

<b>Company</b>	<b>Covered Market as % of IPM (Value) - FY20</b>
Mankind	61.80%

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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**Overall prescriber and prescription penetration for Mankind**

Overall prescriber penetration for Mankind

Company	FY22
Mankind	81.56%

Overall prescription penetration for Mankind

Company	FY18	FY19	FY20	FY21	FY22	Rank in terms of prescription penetration over the last 5 years (FY18-22)
Mankind	14.98%	15.77%	15.67%	15.45%	15.34%	1
Avg Rx penetration - Excluding Mankind					7.69%	

Source:

*IQVIA Medical Audit MAT March 2022 for India*

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**Mankind's market share in IPM by volume (standard units) and rank**

<b>Company</b>	<b>Market share by volume in IPM in FY20</b>	<b>Market share by volume in IPM in FY22</b>	<b>Incremental Market Share% (FY20-22)</b>	<b>Rank by market share (FY22)</b>
Mankind	5.19%	5.70%	0.52%	2

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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### Number of brand families by revenue buckets - Mankind

Revenue Buckets	Number of brand families (FY22)
INR 2 Billion +	9
INR 1 - 2 Billion	11
INR 0.5 - 1 Billion	16

Revenue Buckets	Number of brand families (FY20)	Number of brand families (FY22)	Growth Ratio of # of brand families in FY22 over FY20
> INR 2 Billion	7	9	1.3x
> INR 1 Billion	13	20	1.5x
> INR 500 Million	29	36	1.2x

### Domestic sales by revenue bucket and % sales contribution - Mankind

Revenue Buckets	Domestic sales in FY22 (INR Million)	% Sales contribution in total portfolio (FY22)
> INR 500 Million	54,617.33	66.45%

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

*Note: Brands with non-zero sales are considered*

*Note: A brand family is an aggregate of individual brand extensions*

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**Growth drivers - IPM and Mankind**

Company	FY20	FY21	FY22				Average % annual contribution from volume (FY20-22)	Rank of Average % annual contribution from volume (FY20-22) amongst the top 10 corporates
	% growth from volume	% growth from volume	Overall % value growth	% growth from volume	% growth from price	% growth from new introductions		
<b>IPM</b>	2.48%	-3.57%		9.71%			2.87%	
Mankind	9.21%	1.79%	24.28%	16.69%	3.74%	3.85%	9.23%	2

Source:  
IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)

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**Year of incorporation for Mankind, identified peers and top 10 corporates**

<b>Company</b>	<b>Year of Incorporation</b>	<b># of Years of Operations, as of 2022</b>
Peer 1	1983	39
Peer 2	1944	78
Peer 3	1935	87
Mankind	1991	31
Peer 4	1973	49
Peer 5	1959	63
Peer 6	1952	70
Peer 7	1924	98
Peer 8	1949	73
Peer 9	2007	15
Peer 10	1976	46

<b>Company</b>	<b>Year of Incorporation</b>	<b># of Years of Operations, as of 2022</b>
Corp 1	1983	39
Corp 2	1944	78
Corp 3	1935	87
Mankind	1991	31
Corp 4	1973	49
Corp 5	1968	54
Corp 6	1985	37
Corp 7	1989	33
Corp 8	1959	63
Corp 9	1971	51

Source:  
Annual filings/ company websites

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**Domestic sales, % sales contribution, and other information for Mankind's key brands**

**Domestic sales for Nurokind and Telmikind**

Brand	Domestic sales in FY22 (INR Million)
Nurokind	5,265.36
Telmikind	3,912.31

**Total sales and growth for Dydrogesterone subgroup**

	FY20	FY21	FY22
Total sales for Dydrogesterone subgroup (INR Billion)	3.94	4.16	6.08
Y-o-Y Growth	17.82%	5.46%	46.40%

**Market share of Mankind's Dydroboon brand vis-à-vis key competitors**

Brand Name	Product Launch (YYYY/MM)	FY18	FY19	FY20	FY21	FY22
Competitor 1	1998/01	100.00%	100.00%	96.84%	78.59%	54.31%
Dydroboon	2019/12	0.00%	0.00%	3.16%	19.77%	24.59%
Competitor 2	2020/10					
<b>Total no. of players in Dydrogesteron subgroup</b>		1	1	2	3	9

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

*IQVIA TSA MAT March 2020 Dataset for India (For FY18-19)*

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### Domestic sales of Mankind's 20 largest brand families

Brand Family	Domestic sales in FY22 (INR Million)	% Contribution to total sales
Nurokind	5,265.36	6.41%
Telmikind	3,912.31	4.76%
Manforce (Rx)	2,932.21	3.57%
Unwanted	2,907.57	3.54%
Gudcef	2,871.90	3.49%
Moxikind	2,801.20	3.41%
Amlokind	2,496.67	3.04%
Glimestar	2,479.82	3.02%
Asthakind	2,246.31	2.73%
Codistar	1,709.02	2.08%
Candiforce	1,681.96	2.05%
Mahacef	1,680.03	2.04%
Prega News	1,529.11	1.86%
Dydroboon	1,496.02	1.82%
Cefakind	1,393.04	1.69%
Zenflox	1,388.81	1.69%
Monticope	1,242.37	1.51%
Dynaglipt	1,054.46	1.28%
Caldikind	1,036.55	1.26%
Ranidom	1,018.38	1.24%

Source:

*IQVIA TSA MAT March 2022 Dataset for India (For FY20-22)*

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**Sales CAGR for key consumer healthcare categories where Mankind has presence**

Category	Sales CAGR (FY20-22)
Condoms	-0.23%
Pregnancy Tests	16.61%

Source: IQVIA MAT March 2022 OTC Audits for India (For Condoms, Acne Preparations, Antacids); IQVIA TSA MAT March 2022 Dataset for India, IQVIA TSA MAT March 2020 Dataset for India (For VMS, Pregnancy Tests, Emergency Contraceptives)  
\*For emergency contraceptives, Levonorgestrel subgroup has been considered from IQVIA TSA MAT March 2022, IQVIA TSA MAT March 20

Note: OTC audits are conducted on total panel of 42k stores across country every month covering CPG retail channels like Grocers, General Stores, Chemists, Paan Bidi outlets, Cosmetics, Food Stores, Modern Trade banners and Modern Trade Standalone stores. It doesn't cover modern Pharmacy chains and e-commerce sales. Panel represents pan India market spread across urban and rural towns excluding valley and islands.

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**Domestic sales, market share, CAGR and Rank for Mankind's key consumer healthcare brands**

Brands	Domestic Sales in FY20 (INR Million)	Domestic Sales in FY22 (INR Million)	% Market Share in Category (FY22)	Rank in Category (FY22)	Sales CAGR (FY20-22)
Manforce (Condoms)	4,167.58	4,510.78	30.20%	1	4.04%
Prega News	1,017.48	1,529.11	80.09%	1	22.59%
Acne Star	500.08	711.68	13.23%	2	19.29%
Unwanted-72	676.13	904.06	59.20%	1	15.63%
Health - OK	601.82	859.02	3.41%	5	19.47%

Brands	Domestic Sales in FY22 (INR Million)	Rank in FY22	% Market Share in Category (FY20)	% Market Share in Category (FY22)	% Market Share for Competitors (1,2,3) (FY22)
Manforce (Condoms)	4,510.78	1	27.73%	30.20%	11.2%, 9.3%, 7.7%
Gas-o-Fast	1,120.00	5	3.12%	4.04%	50.2%, 10.8%, 7.7%
Prega News	1,529.11	1	72.47%	80.09%	6.2%, 4.1%, 2.8%

Source: IQVIA MAT March 2022 OTC Audits for India (For Condoms, Acne Preparations, Antacids); IQVIA TSA MAT March 2022 Dataset for India, IQVIA TSA MAT March 2020 Dataset for India (For VMS, Pregnancy Tests, Emergency Contraceptives)  
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Note: OTC audits are conducted on total panel of 42k stores across country every month covering CPG retail channels like Grocers, General Stores, Chemists, Paan Bidi outlets, Cosmetics, Food Stores, Modern Trade banners and Modern Trade Standalone stores. It doesn't cover modern Pharmacy chains and e-commerce sales. Panel represents pan India market spread across urban and rural towns excluding valley and islands.

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**Definitions**

IPM = Indian Pharmaceutical Market

ATC = Anatomical Therapeutic Chemical Classification

Value = Value sales at PTR (Price to Retailer)

MAT = Moving Annual Total i.e. Value sales of 12 months. E.g. MAT March 2022 covers April 2021 to March 2022

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