



December 04, 2025

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 : Investor Presentation

Stock Code : BSE – 539787, NSE – HCG

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

Further to our intimation dated November 22, 2025, regarding the virtual Investor and Analyst Meet scheduled on December 04, 2025, please find enclosed herewith the Presentation on the Company's business strategy and long-term growth plans.

We have also enclosed, for the convenience of participants, the meeting invite along with the registration link for joining the session, as shared earlier.

You are requested to kindly take the above information on record.

Thanking you,

For **HealthCare Global Enterprises Limited**

Sunu Manuel
Company Secretary & Compliance Officer

Encl: a/a.



HEALTHCARE GLOBAL ENTERPRISES LIMITED

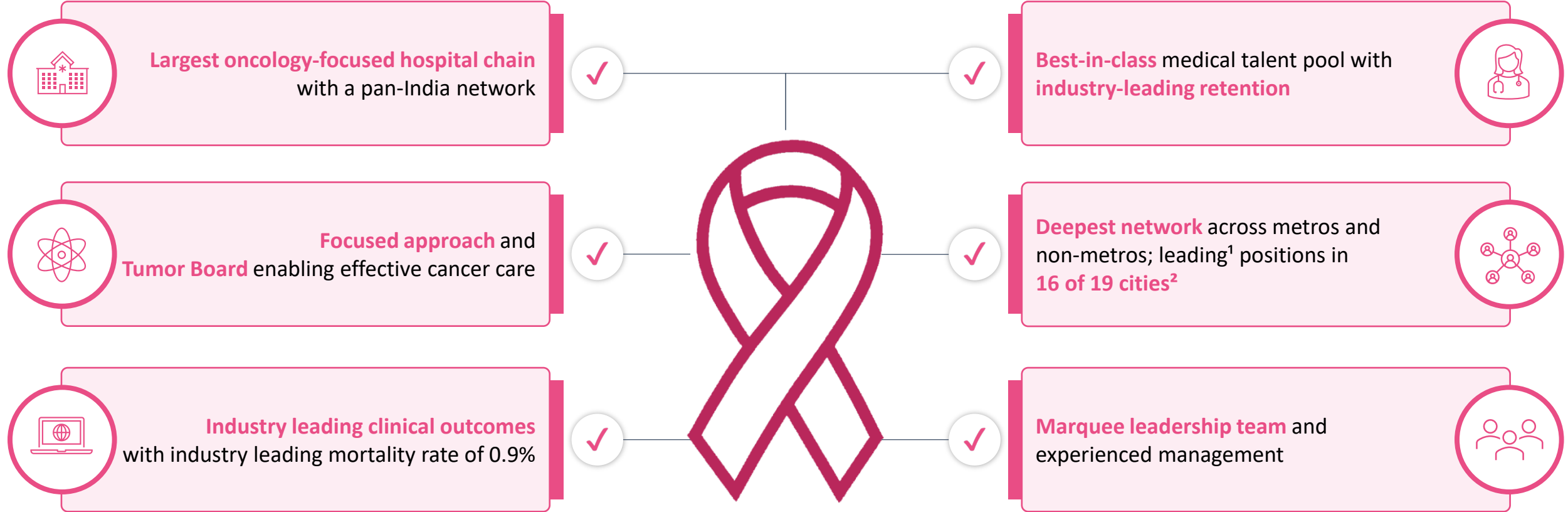


INVESTOR PRESENTATION

December 2025



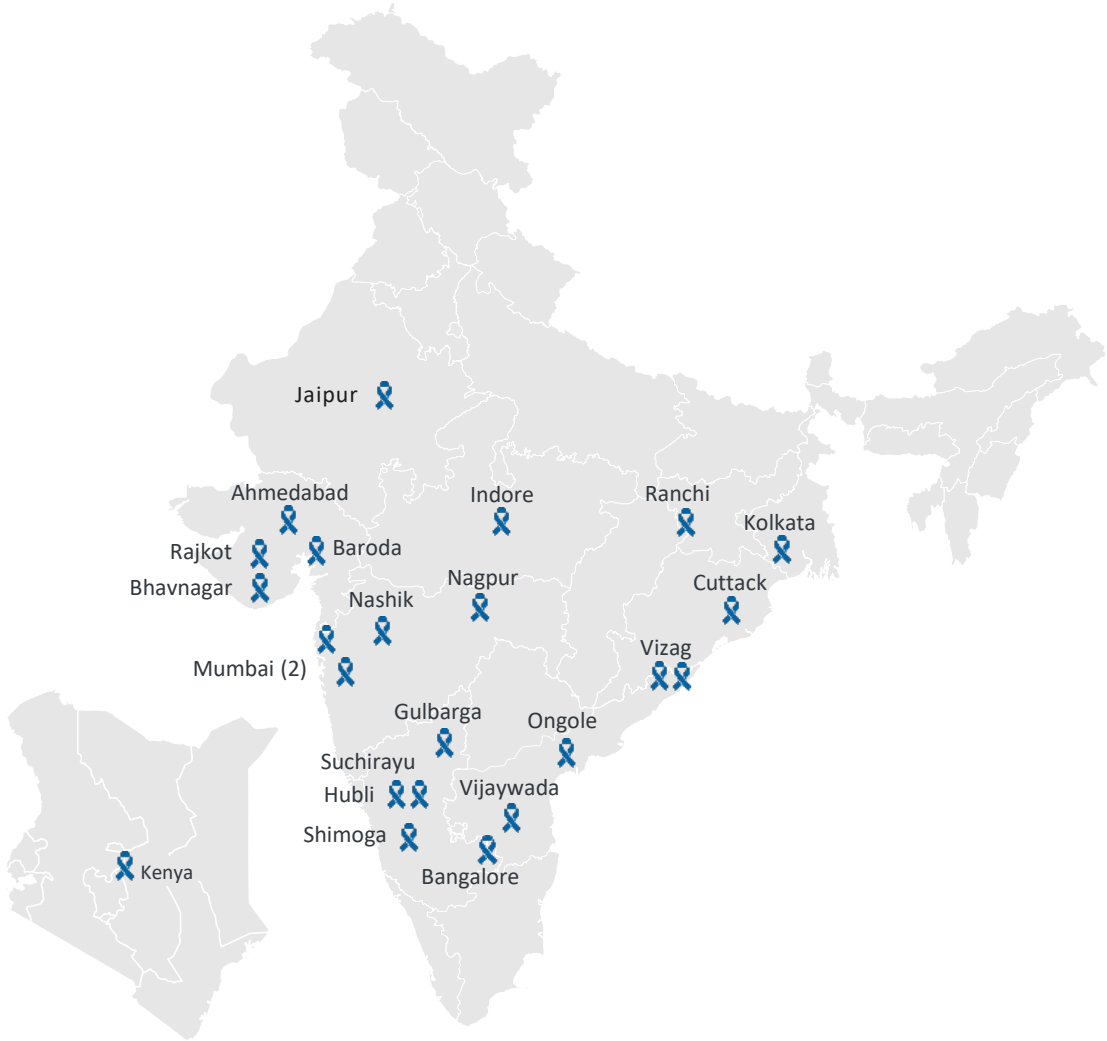
A Unique Oncology Platform Redefining Comprehensive Cancer Care Treatment



Underpinned by a personalized patient-centric approach, superior technology, and industry leading medical excellency



Largest Pan-India Oncology Focused Hospital Chain



Largest Geographical Reach...

10

Number of states covered¹

19

Number of cities covered¹

25

No. of hospitals³

16/19

Leading positions²

...With Leading Treatment Infrastructure

400+

Oncologists network⁵

38

Number of LINACs⁴

19

Number of PET CTs

98

Operation theatres³

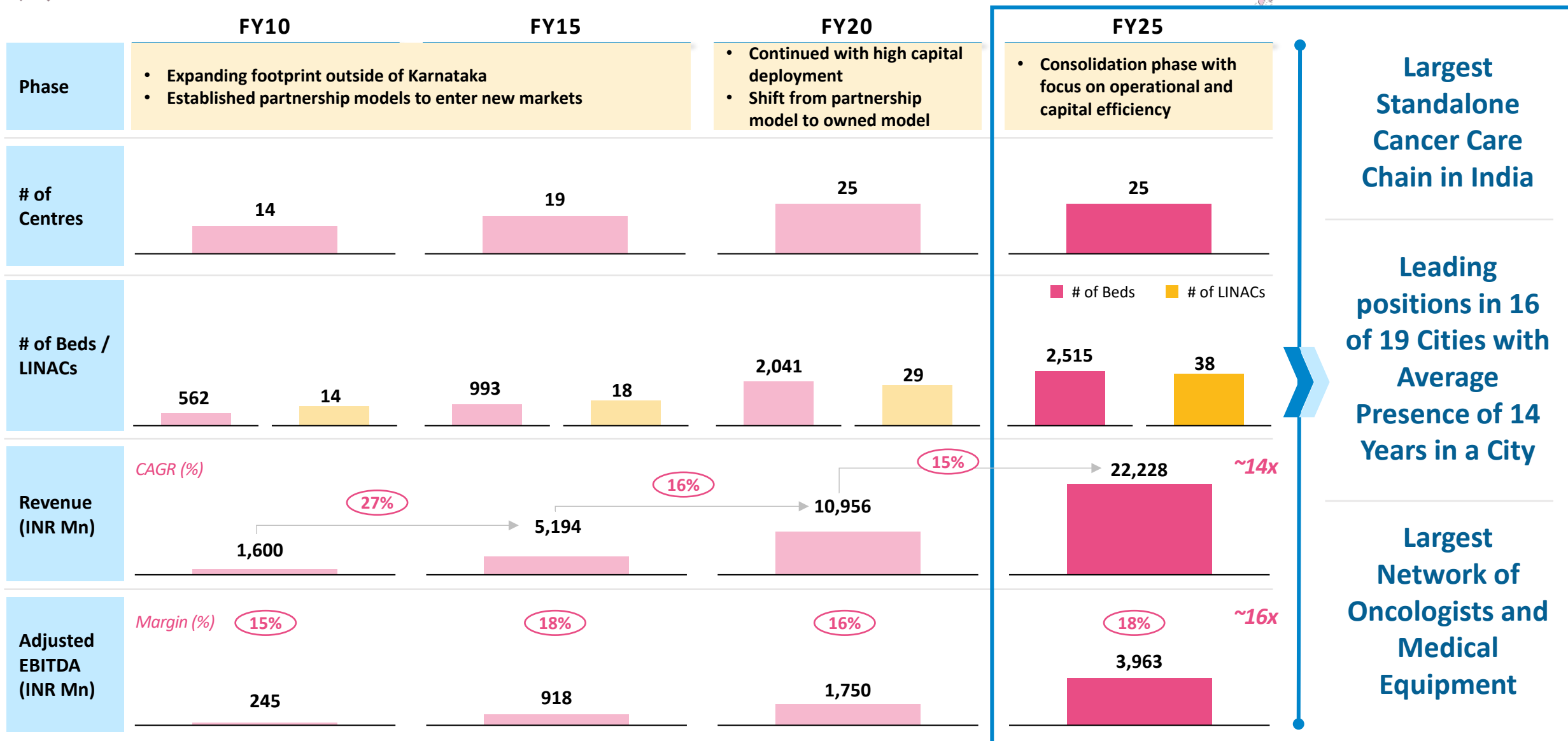
2.5k+

Capacity beds³

Note: (1) Excludes Kenya; (2) HCG in top 3 based on management estimates; excludes Chennai; (3) Includes multispecialty; (4) Includes Chennai and MSR; (5) Includes all revenue generating oncologists from Sept'24 – Mar'25



Proven Profitable Expansion Track Record



Note: EBITDA mentioned above is adjusted for ESOP and other one-time costs

KKR

KKR is a global investment firm with a culture deeply rooted in the pursuit of excellence and shared success with our clients, our companies, and our communities

Over 49 Years	of investment experience
~\$723B in client AUM	Invested across Private Equity, Real Assets & Credit and Liquid strategies
Multi-asset expertise	Across Private Equity, Real Estate, Infrastructure, and Credit
\$220B+	Global Private Equity AUM
>\$170B ¹	Aggregate Capital Invested in Private Equity

Select India Healthcare Investments



Leading multi-specialty hospital chain in South India



Leading pharmaceutical manufacturer



Leading provider of healthcare services



Leading global surgical devices manufacturer

Select Global Healthcare Investments



Leading reproductive medicine group



Provides dental services



Leading distributor of healthcare products in US



Leading provider of healthcare services in Philippines



Leading provider of healthcare services in France



Leading provider of healthcare services in US



Provides integrated CRO services



Leading provider of clinical development and data solutions to pharma companies



Dr. Manish Mattoo

Executive Director and CEO

“

“HCG today stands at an exciting inflection point. With a strong platform, a clear vision, and a committed team, we are well-positioned to capture the opportunities ahead and to continue delivering on our promise of transforming cancer care in India.

As we prepare for the next stage, we are aligning our people, systems, and culture around a unified growth agenda that balances expansion with disciplined capital allocation. We will enhance performance at mature centres, fast-track the ramp-up of emerging markets, and strengthen our international and cash businesses through focused execution. Our goal is to build a future-ready organisation that scales with consistency, delivers superior outcomes, and sets new benchmarks for oncology care.”

”

Manish is the Executive Director and CEO of HCG

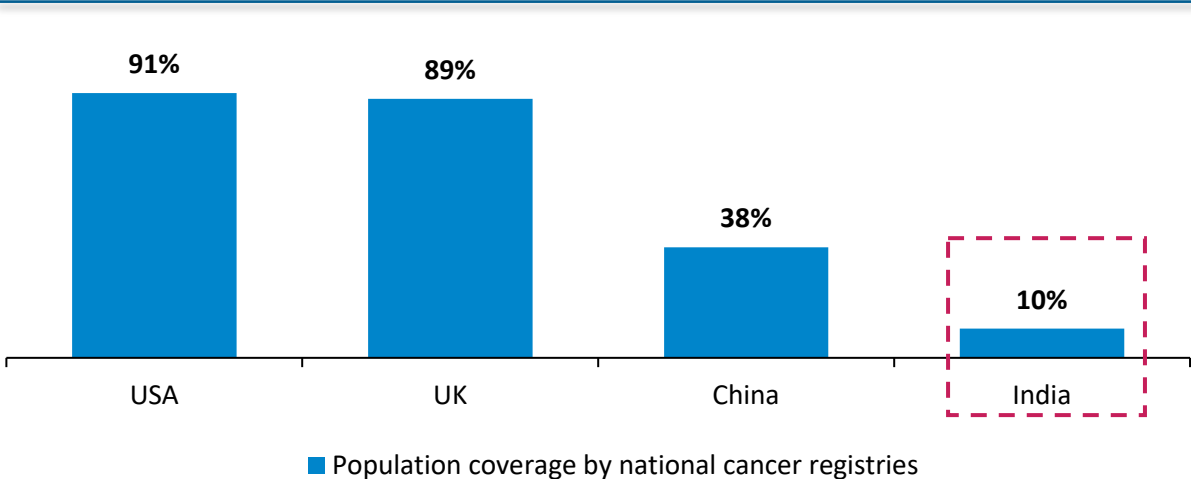
- Previously served as the CEO of Apollo Karnataka and Central region (largest territory of India's leading hospital group)
- 20+ years of diverse industry experience across multiple geographies and functions, including P&L management, operations, business strategy, supply chain and internal audit
- Leadership positions at renowned institutions such as PGI Chandigarh, Medtronic, Fortis Healthcare
- Education: Holds an MBA (Finance and Strategy & Leadership) from Indian School of Business (ISB); MBBS with MD in Anesthesiology from BJ Medical College, Ahmedabad

Cancer Care in India

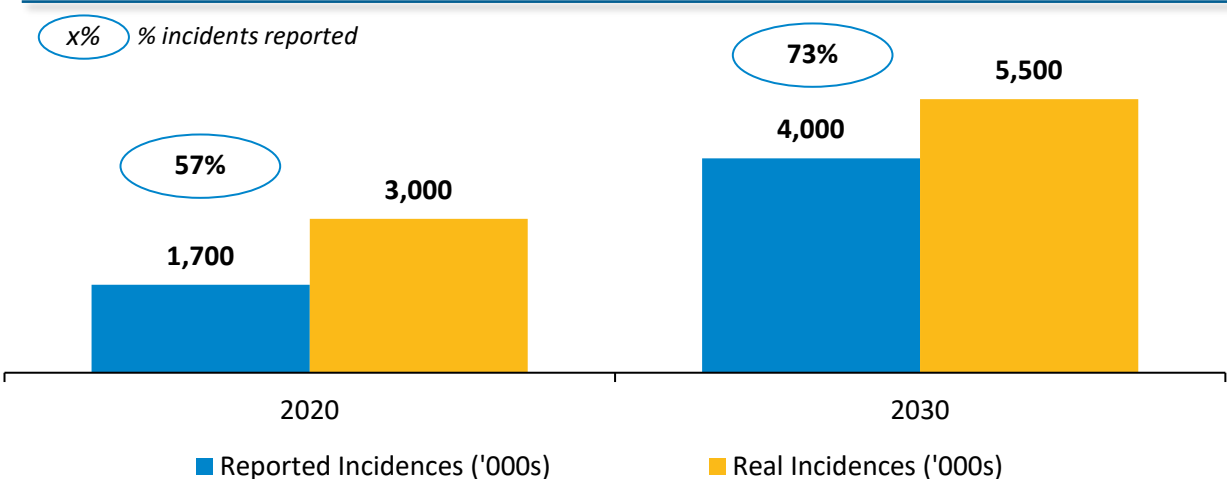


Cancer Care in India is Underpenetrated...

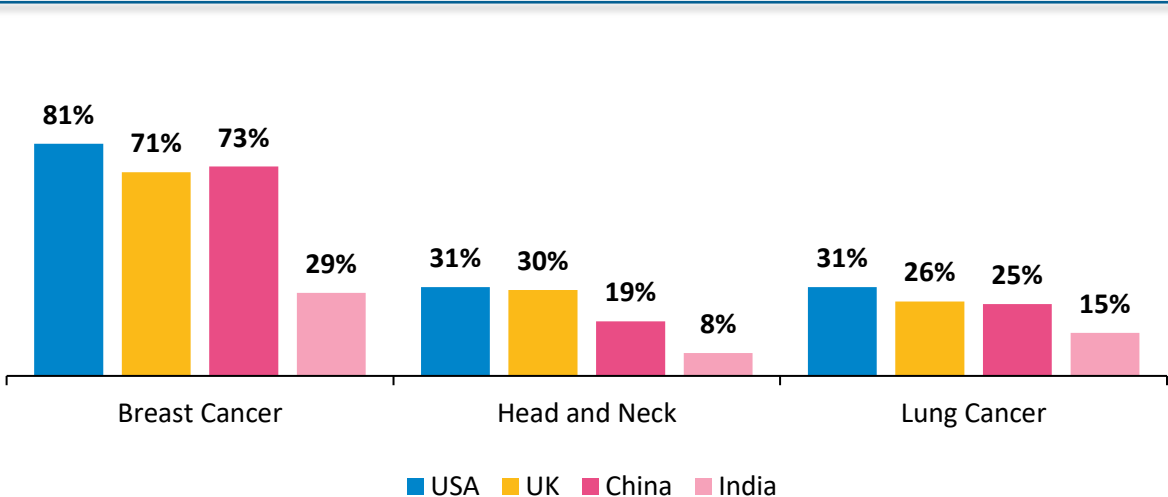
Under-coverage of Population



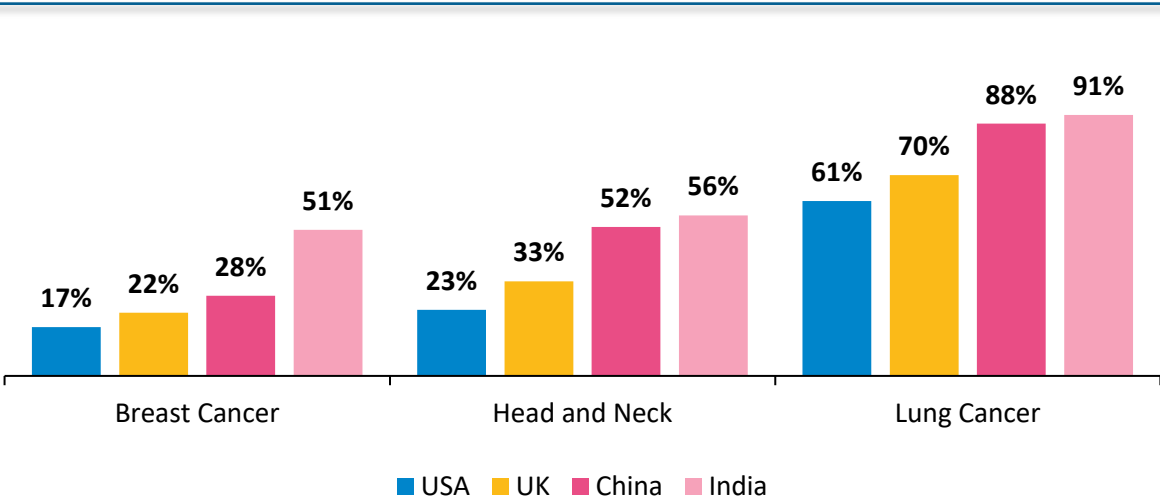
Under-reporting of Incidences



Low Early-stage Diagnosis in India ...



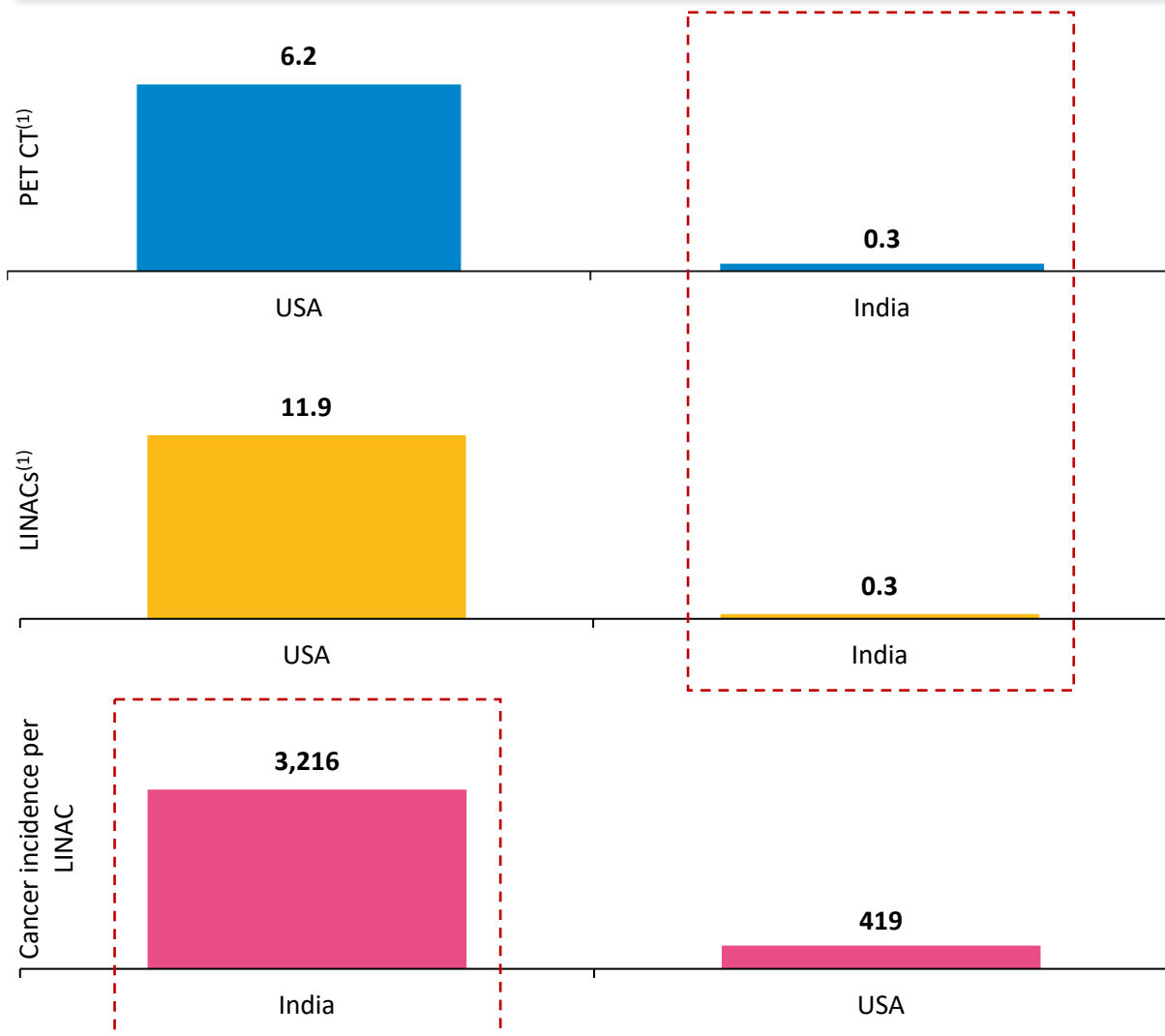
...leading to High Mortality to Incidence Ratio





...and Underserved

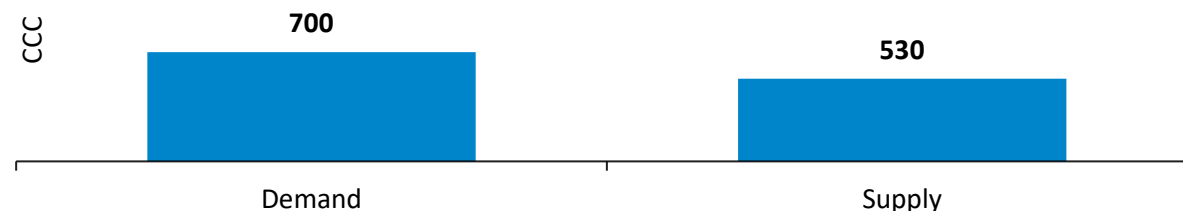
Cancer Diagnosis Equipment is Significantly lower than Developed Markets



Significant Demand Supply Gap in Oncology Specific Infrastructure & Workforce

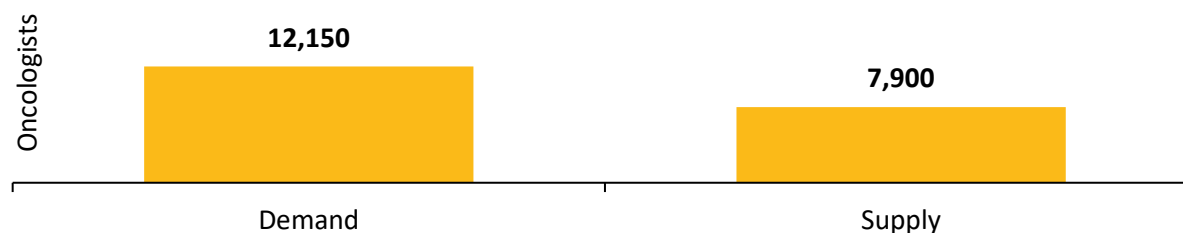
- Only 175 of 500+ districts covering 40% - 45% of population have CCC
- 40% of CCC are concentrated in metros/ state capitals

1.3x



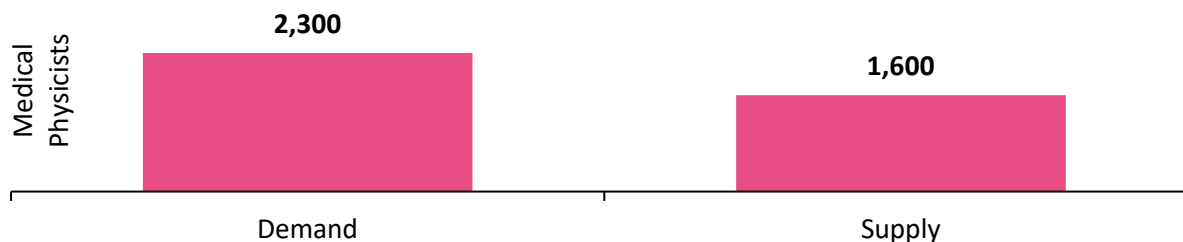
- Incidence per clinical oncologist (medical and radiation oncologist) at 315 compared to 120 in China and 137 in the US

1.5x



- Demand supply gap in medical physicists while being acute currently is further expected to widen by 130 every year

1.4x



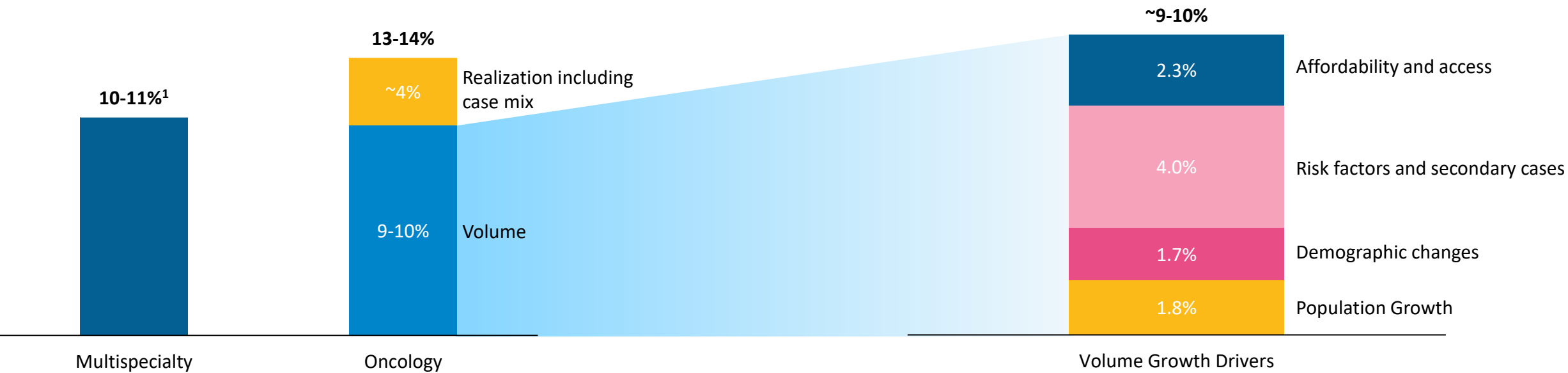
Demand/Supply



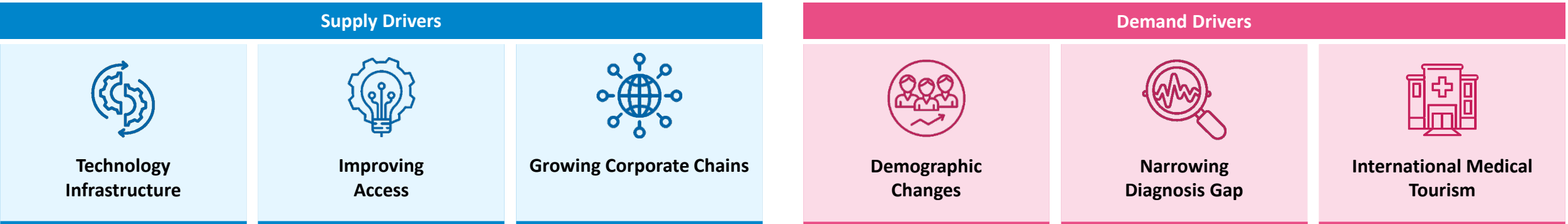
Oncology is One of the Fastest Growing Specialties in India



India Oncology Market Growth Fueled by Increasing Patient Volumes



Key Structural Drivers



Notes: (1) Growth excluding oncology
Sources: Census of India, EY cancer report 2022, Indicus data, AERB February 2021, EY analysis

A Focused Approach to Oncology for Superior Patient Outcomes



Focused Approach is Critical for Quality of Life and Leads to Superior Patient Outcomes



Cancer has Unique Challenges that Requires a Specialist Approach

Chronic, recurring, complex and heterogeneous

Cancer is an enigma – can spread from source organ to other parts rapidly

Multiple treatments and oncologists required by each patient

Rapidly evolving landscape requiring constant research focus



Solutions available only at Comprehensive Cancer Care (CCC) Centres

End-to-end and ancillary care solutions

Ability to detect and treat advanced forms of cancer

Sub-specialists by organ / modality

Advanced technologies sourced via global research and innovation



HCG's Focused Approach for Most Effective CCC

Personalized and patient-centric care

Advanced diagnostics capabilities including genomics and precision medicine

Largest oncologist sub-specialty network with focus on research and collaboration

Fastest technology adoption with flexibility to innovate



OTHER CCCs



MULTI-SPECIALTY HOSPITALS



Superior Patient Outcomes
(Gross Mortality Rate of 0.9%)
Ensuring Better Quality of Life

Single Specialty players hold
50%+ market share in 9 cities
and are market leaders in **16/19**
cities where HCG is operational



Global Case Studies and Research Reinforces the Need to Create Single Specialty Hospitals for Cancer Care

Leading Global Cancer Hospital #1

✓ Announced collaboration with Beth Israel Deaconess Medical Centre (BIDMC)

✓ Terminated partnership with Brigham and Women's hospital

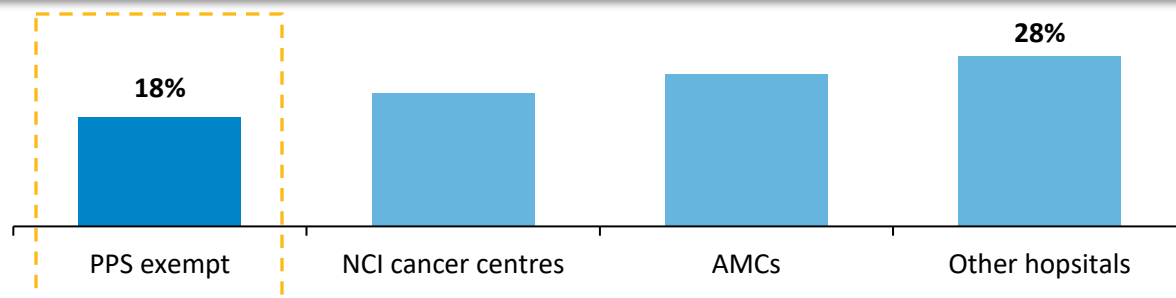
✓ Objective of independently focusing on cancer care rather than operating within a large health system

*"If the mission is to **truly defy cancer**, to reduce the burden of this disease on patients and families, one need **look only at the outcomes**. Published data shows patients cared for in **dedicated cancer hospitals** have **better outcomes** than patients who receive their care at general hospitals. And it makes sense. **When all you do is cancer**, when the brightest minds work together as a single, highly specialized team, **patterns emerge, and you can see things others do not see.**"*

Leading Global Cancer Hospital #2

✓ Study examining cancer-care outcomes among US hospitals⁽¹⁾; highlighted variance in outcomes across different types of providers, which is an important decision-making criteria for patients

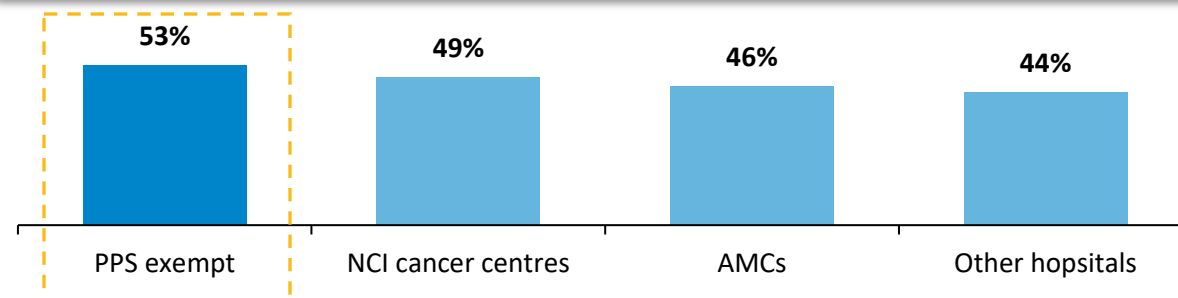
10pp lower post-treatment **first-year mortality** at PPS exempt hospitals vs other multi-specialty hospitals



*"Patients need **reliable information** about **hospitals' survival rates** so they can make **informed choices** about their care."*

- MD, Chief of Head and Neck Oncology Service

9pp higher risk adjusted **five-year survival rates** at PPS exempt hospitals vs other multi-specialty hospitals



*"This **observed** one-year survival gap of **10 percent** between hospital types is **substantial** and represents **potentially preventable deaths** of cancer patients."*

-MD, MAPP, Director of Centre for Health Policy and Outcomes



~90% Doctors Prefer Referring Cancer Patients to Single-Speciality Centres vs. Other Formats

Q: Do you prefer referring to multi-specialty Centres vs oncology focused specialized Centre

No. of responses - 82



Q: Reasons for selecting oncology focused specialized Centre



**Comprehensive care
(one stop shop)**



**Expert doctors
across all treatment
modalities**



**Latest treatment
options**



**Advanced
technology and
medical systems**



**Multi-disciplinary
approach to
treatment / tumor
board**

HCG: India's Leading Oncology Platform



HCG is at the Forefront of the Battle against Cancer



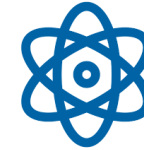
VISION

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

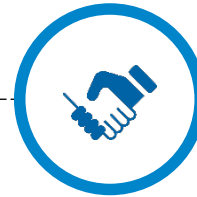


VALUES



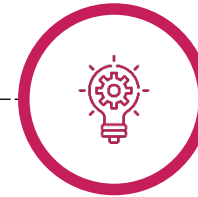
Quality

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



HCG is Positioned as the 'Destination for Cancer Care' with Superior Clinical and Non-clinical Expertise...

Diagnostics

Treatment

Post Care



**Genomics and
Molecular
diagnostics**



Digital PET



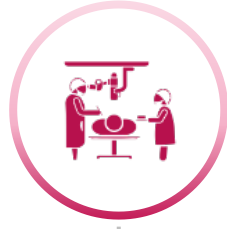
**Preventive
Oncology**



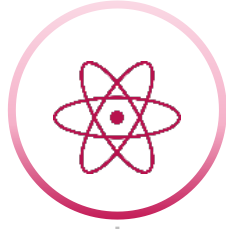
**Medical Oncology
and Haemato-
Oncology**



Radiation Oncology



**Surgical
Oncology**



**Molecular Imaging
and Theranostics**



**Psychological
support**



**Preventive
Oncology**



Physical
Examination



Laboratory
Tests



Home Health
Services



Digital
Pathology



Digital
PET



Preventive
Oncology



Genomics



CTC¹
detection



Chemotherapy



Radiation



Robotic
Surgery



Actinium and
Lutetium
therapy



Immunotherapy



Psycho-
oncology



Liver
Transplant



Iodine
Therapy



Targeted Drug
Therapy



Pediatric
Oncology



Organ preservation
& Reconstructive
surgery



Endocrine
Therapy



Bone Marrow
Transplant



Patient
Care



Home Health
Services



Psychological
Support



Preventive
Oncology



Nutrition



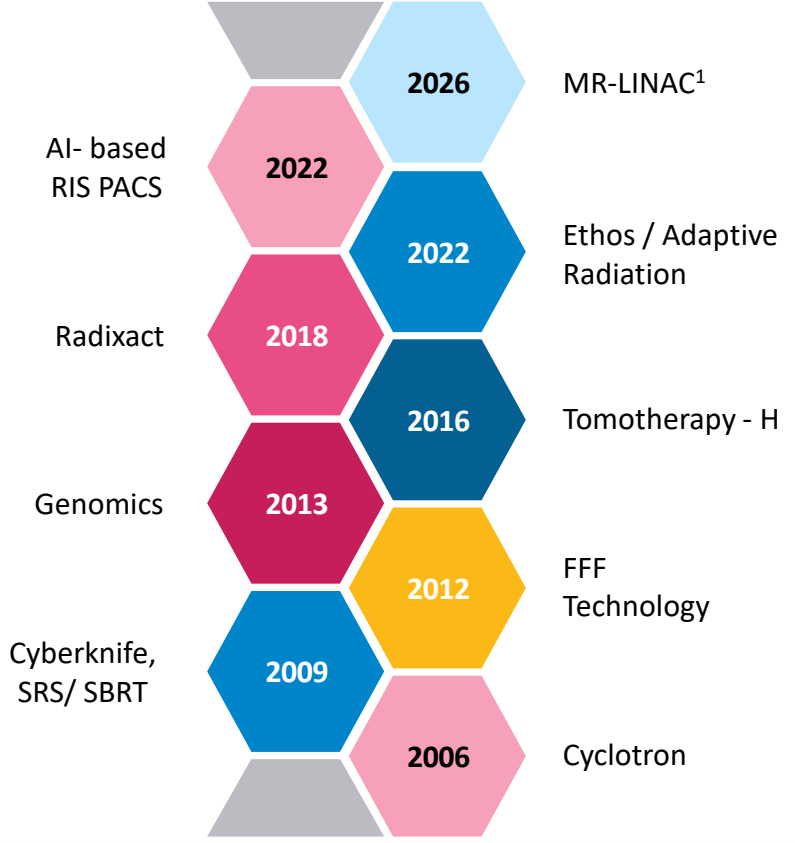
Rehab



Genetic
Counselling

★ Specifically available in Single Specialty. Not available / Outsourced at multi-specialty

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 : 19



Digital PET



Digital CT Pathology



Automated Breast Volume Scanner



Digital Mammography



Skyra Tesla 3T for MRI



Molecular / Genomics Lab

RADIOTHERAPY

Total LINACs : 38



Cyber Knife



MR-LINAC



True Beam



Versa HD



Radixact



Tomotherapy

MEDICAL/SURGICAL ONCOLOGY

Total Robots: 8



Da Vinci Robot



Versius Robot



Holo Lens



Bone Marrow Transplant Units



"Tumor Board approach" – Pioneer in scientific discourse-led innovation with right case selection and learning methodology

Spearheaded by Dr. Ajai, who also heads IRC¹ of 30+ oncologists for Investigator Initiated Research Studies

17+ years of nation-wide **Tumor Boards** held weekly

Supplemented by multiple **local tumor boards**

Multi-disciplinary Tumor Board ...

... Takes Inputs From Large Network ...

... Is Patient Focused



250+

Oncologists participated



36K+

Cases discussed till date

Decision Making Body

Tumor board
Convenor

Chairman

Special committee

Panelists

Leading Oncologists

Radiologists/
Pathologists

Clinical Experts and
academicians

Participants

Treating clinicians

Support Specialities²

All other clinicians



Highly
specialized
team



Patient
centric



End-to-
end
services



Accuracy
and
reliability

Case Selection

Preparation

Deliberation

Execution



Unwavering Focus on Improving Mortality and Enhancing Quality of Life

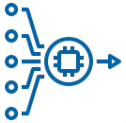
Well researched strategy to minimize disease recurrence

Comprehensive Approach



- Genomics Driven
- Molecular Histopathologic Examination
- PET CT Scans
- Prognostication – Risk & Uncertainty

Multidisciplinary Decision



- Integrated Multi-disciplinary therapy
- Focus on advanced / complex / recurrent cases
- Communication of options & outcomes

Targeted Follow Ups



- Appropriate intervals - investigations & follow up
- Improved patient satisfaction

Mortality Rate reduced from 3.4% in 2016 to 0.9% in 2025

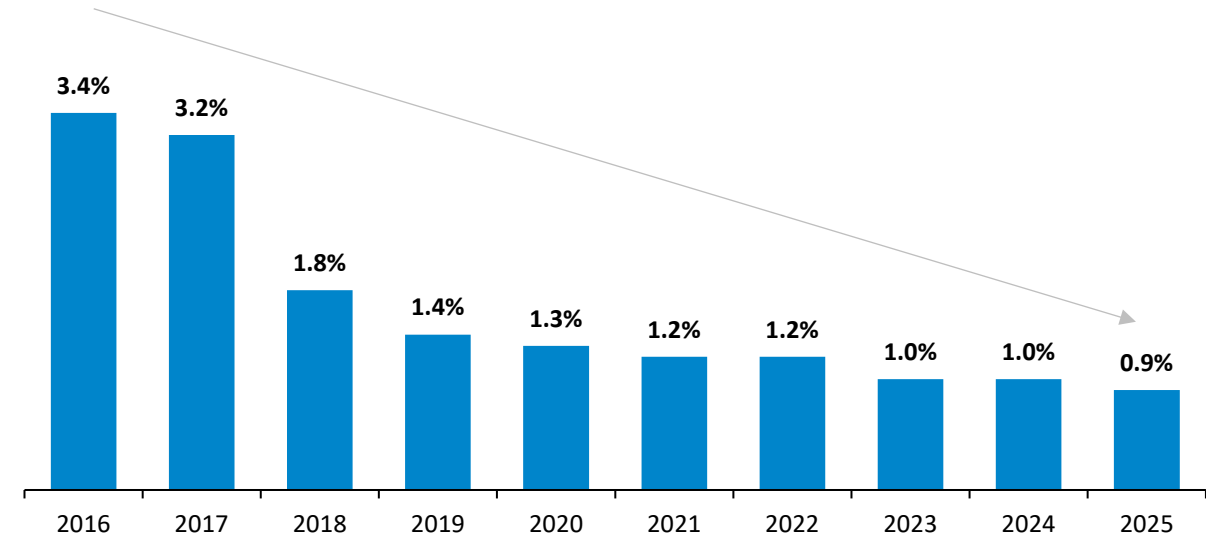
4x

Increase in # of patient discharges over 2016 to 2025

74%

Reduction in Gross Death Rate over 2016 to 2025

Gross Mortality Rate

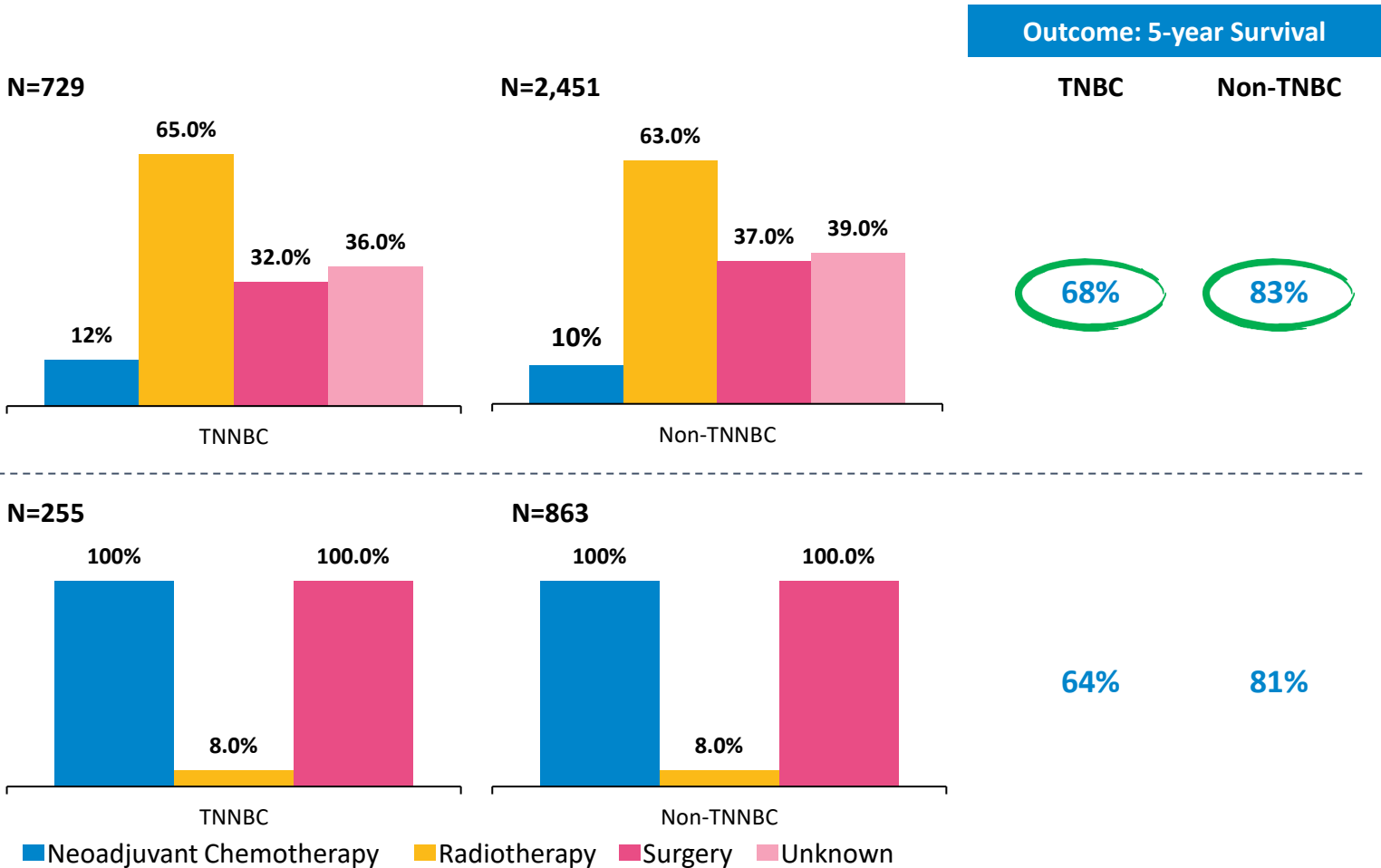




HCG has Been Able to Achieve Better Clinical Outcomes Compared to Leading Int'l Cancer Focused Peers



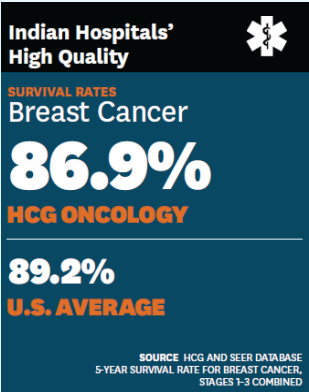
Treatment Administered And Outcomes – HCG VS. a Leading Global Cancer Hospital



COVERAGE BY HARVARD

GLOBALLY COMPARABLE OUTCOMES

Survival Rate

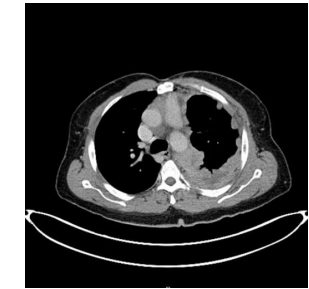
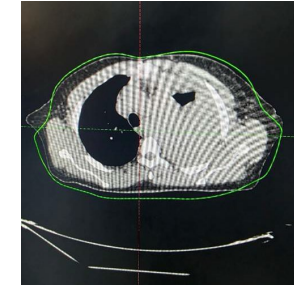


Cost





Select cases of Clinical Excellence through Rare and Complex Treatments with Industry Leading Technology



Case

- 28-months old infant with a rare 11x10 cm Fibrosarcoma
- Functional compromise of the right forearm and a rapidly growing, fungating mass



Complexity

- Tumour surrounded major blood vessels and nerves, making the surgery exceptionally high-risk



HCG Treatment

- Genomic testing to plan a precision-based treatment
- 7-8 hr high-precision tumour resection followed by one of the world's youngest microvascular flap-free surgeries



Outcome

- One year after birth – full limb preservation, no signs of recurrence and growing like any healthy infant

- 47-year old male with post-resection thymic squamous cell carcinoma (SCC) with extensive disease, ~11 cm mass

- Patient was inoperable post recurrence and was not responding to standard chemotherapy

- Lattice Radiotherapy (LRT), a spatially fractionated radiotherapy was used to deliver a heterogenous dose while minimizing toxicity and inducing immuno changes

- Follow-up imaging at 3 and 9 months – near-complete radiological response and complete resolution of presenting symptoms (cough, breathlessness)



Experienced Board of Directors Bringing Diverse Functional Expertise



Dr. BS Ajai Kumar

Founder and Non-Executive Chairman

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



Dr Manish Mattoo

Executive Director and CEO

Seasoned healthcare leader with 20+ years of clinical & business expertise driving healthcare management



Akshay Tanna

Non-Executive Director

Partner at KKR with 20+ years of investing and finance experience. Board member at JB Pharma, BMH, Healthium, Avendus, etc.



Simrun Mehta

Non-Executive Director

Managing Director at KKR, serving on Boards of Vini Cosmetics, Lighthouse Learning, Avendus, BMH etc.



Anjali Ajaikumar Rossi

Non-Executive Director

Social entrepreneur with over 15 years in healthcare; focused on quality and strategy



Geeta Mathur

Non-Executive Independent Director

Experienced finance professional, serving on Boards of Ashok Leyland, Info Edge, JSW One, IIFL group etc.



Rajagopalan Raghavan

Non-Executive Independent Director

30+ years of leadership experience. Currently serving as Chief Human Resource Officer at CoreStack



Pradip Kanakia

Non-Executive Independent Director

36+ years in audit and governance and have held leadership positions in Price Waterhouse, KPMG. On the Board of JM Financial, Britannia Industries, ICRA Limited etc.



Rajiv Maliwal

Non-Executive Independent Director

Founder of Sabre Partners with 30+ years of investment experience. Board member at Wellspring Healthcare, Monepeak Fintech etc.



Bijou Kurien

Non-Executive Independent Director

Consumer industry leader with 40+ years experience across Titan & Reliance Retail. Board member & advisor to multiple companies



Strong Management Team Focused on Clinical Outcomes, Profitable Growth and Capital Efficiency





Dr Manish Mattoo
CEO
22+



Regional Business Heads



Dr. Bharat Gadhavi
Head – GJ and RJ
31+





Manisha Kumar
Head – Karnataka
16+



Head – East

Head – Maharashtra



In Process
CFO

★



Gopi R. Lama
Head Domestic Sales
35+





Vinayaka Nayak
Head International Business
15+





Identified
IR Head
Exp Joining Date Jan/Feb'25

★



Identified
Head Marketing
Exp Joining Date Jan'25

★



Manikandan M
Head Projects
25+





S Bhattachrjee
Group Head Medical Services
35+





Madan Sampath
Head Supply chain
20+





Dr. Navin Chugh
Head Quality
30+





Identified
Head Clinical Strategy
Exp Joining Date Jan/Feb'25

★



Identified
CIO
Exp Joining Date Jan'25

★



Punitha Singh
Head Nursing
30+



★ New Hire

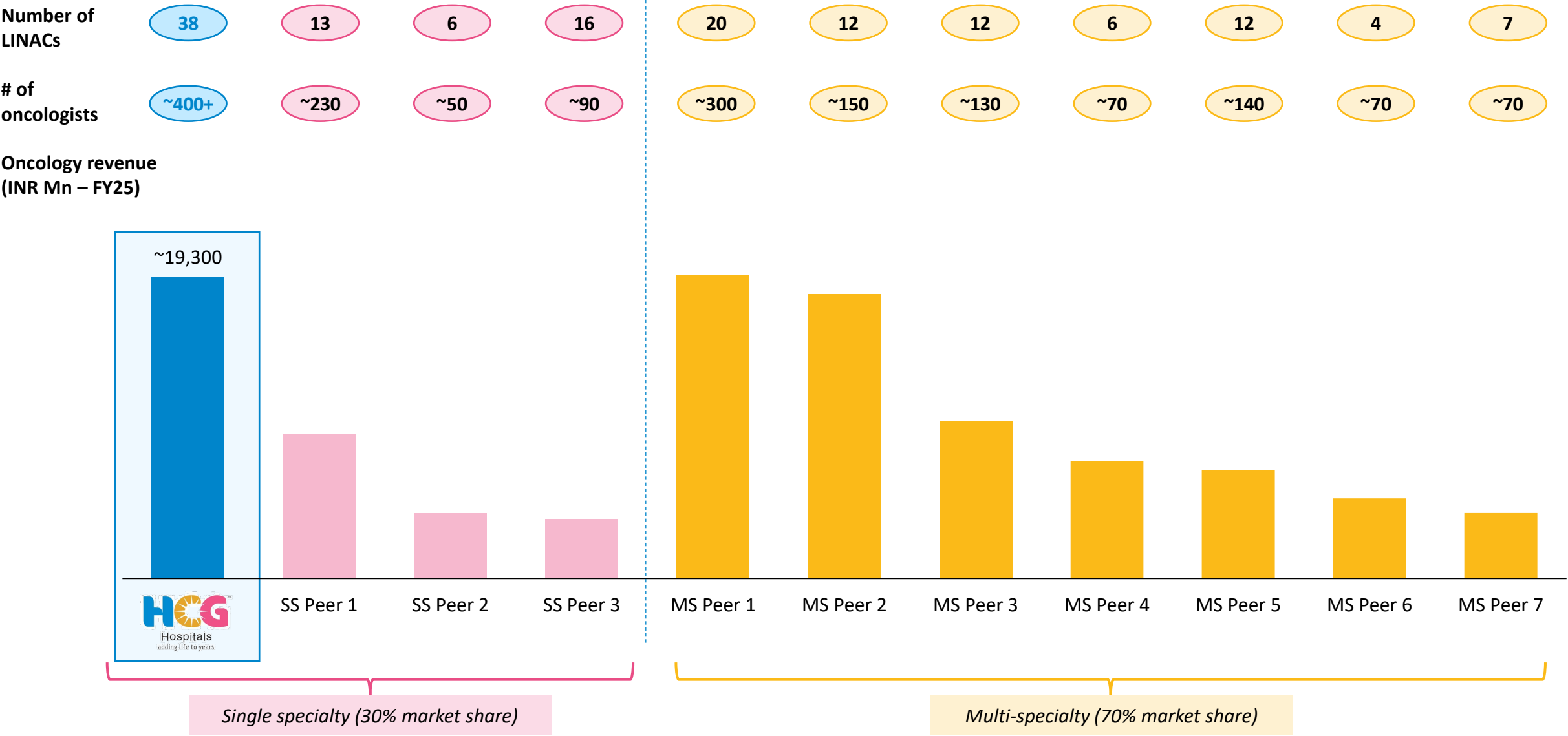
Note: Dr Manish Mattoo is the Interim CFO of the company

www.hcgoncology.com

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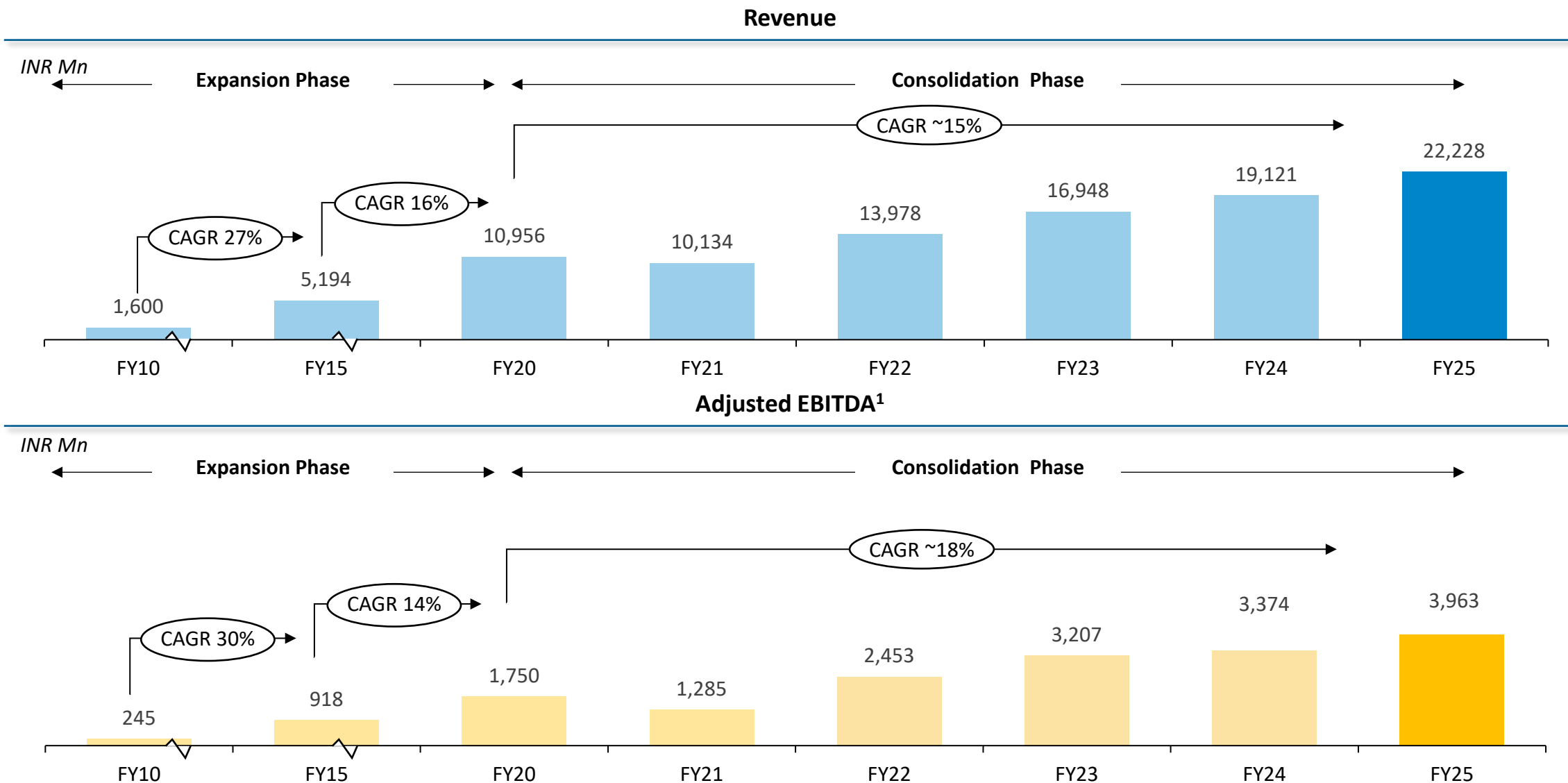


HCG is the Market Leader with Leading Cancer Care Coverage and Operational Capacity





Proven Track Record of Successfully Delivering Profitable Growth Consistently





New Business Segments and Metrics



Business Segments

Key Operating Metrics

Current Reporting

Established - Emerging

- × Most centers have moved to established category
- × Diffuses regional nuances and management structure
- × Insufficient depth within established centers

Occupancy

LINAC Utilization

ARPOB

- × Multiple metrics making volume, capacity and realization confusing
- × Oncology is not strictly bed dependent – only ~23%¹ business is pure IP beds dependent, rest is via OPD, day care beds, partial use of IP beds, etc.



New Format

South

- Karnataka, Andhra Pradesh, Tamil Nadu

West

- Maharashtra, Gujarat, Rajasthan

East

- West Bengal, Orrisa

Intl & Milan

- Kenya (International), Milann (Fertility)

- ✓ Incorporates regional synergies between centers
- ✓ Aligned to organizational structure of business heads
- ✓ Allows for regional nuances affecting business

Patient Volume

- Total volume of admissions across modalities – Chemo, Surgery, Radiation etc.

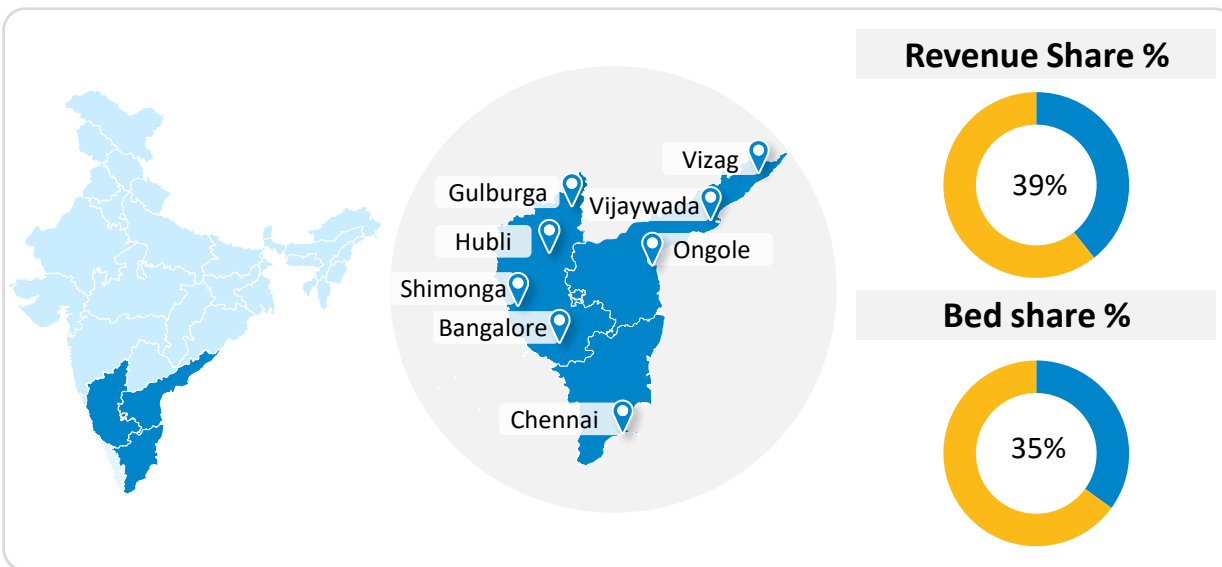
Average Revenue per Patient (ARPP)

- Average revenue per admission – blended realization metric across modalities

- ✓ Single metric to track volume and realization across multiple modalities of treatment
- ✓ Holistic picture of multiple levers of cancer care



Region-wise Business Snapshot: South



FY25



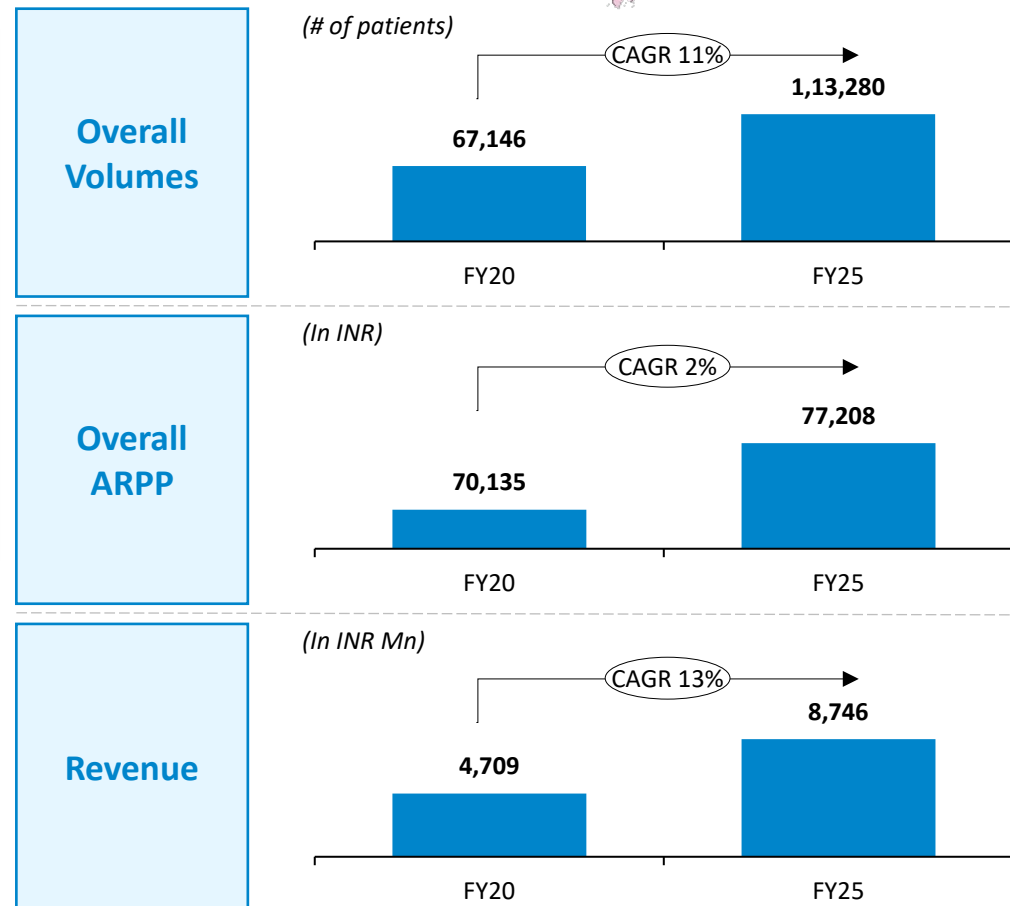
HCG KR
(Bangalore)



Mahatma Gandhi Cancer and Research Institute
(Vizag)



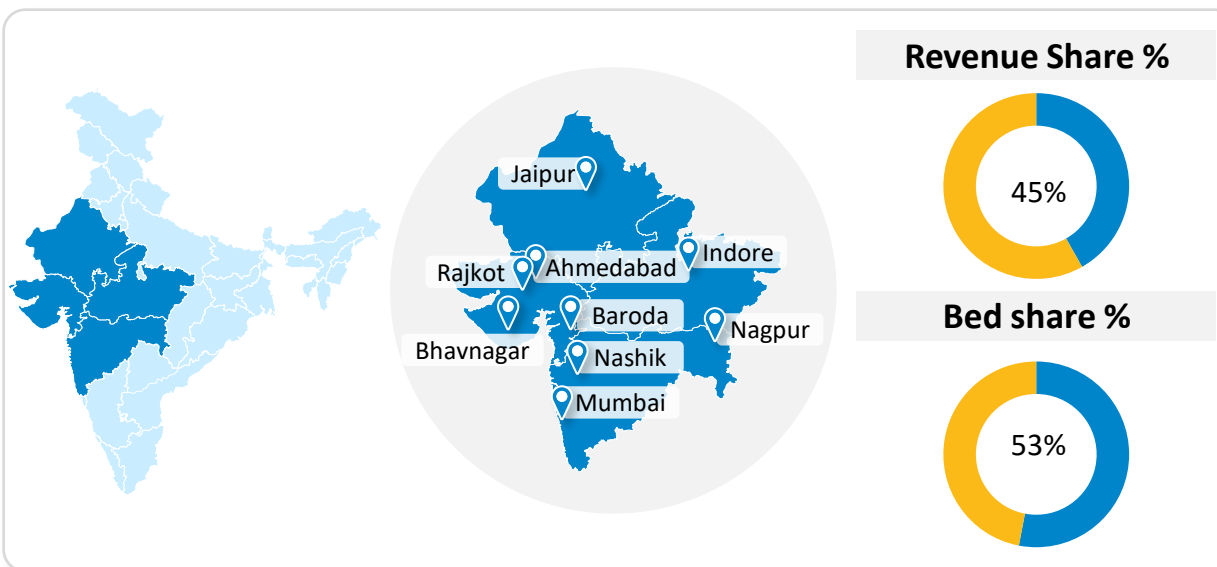
HCG Cancer Hospital
(Gulbarga)



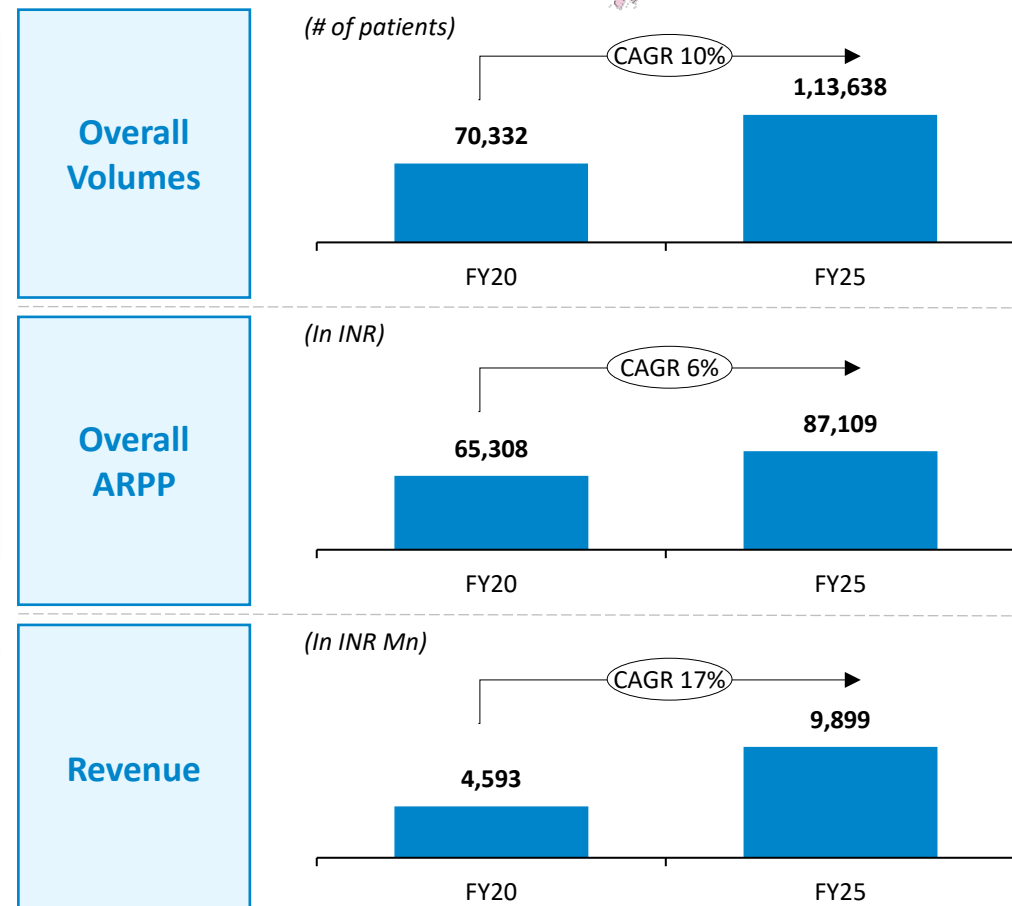
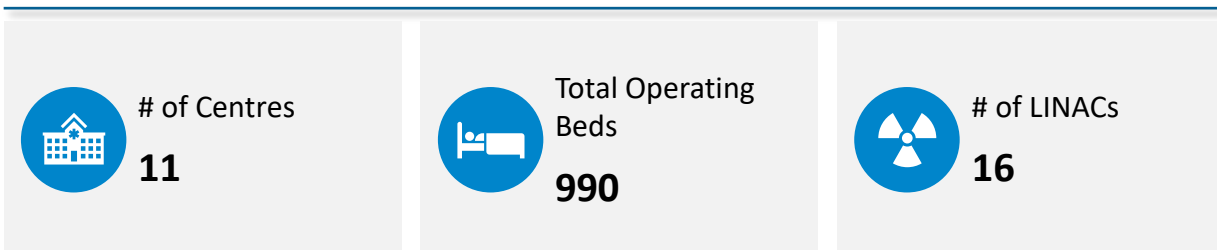
- Leadership position in Bangalore and Vizag driven by clinical expertise and technology
- Focus on launch of two new centres in North Bangalore and Whitefield
- Develop Vizag as a CoE (Centre of Excellence)



Region-wise Business Snapshot: West



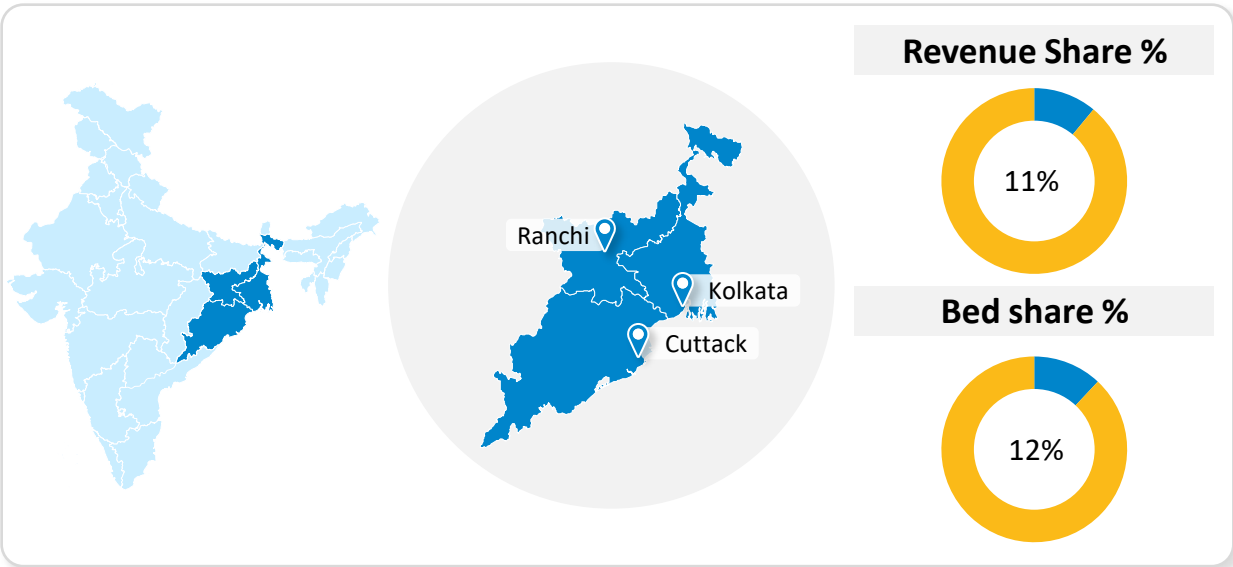
FY25



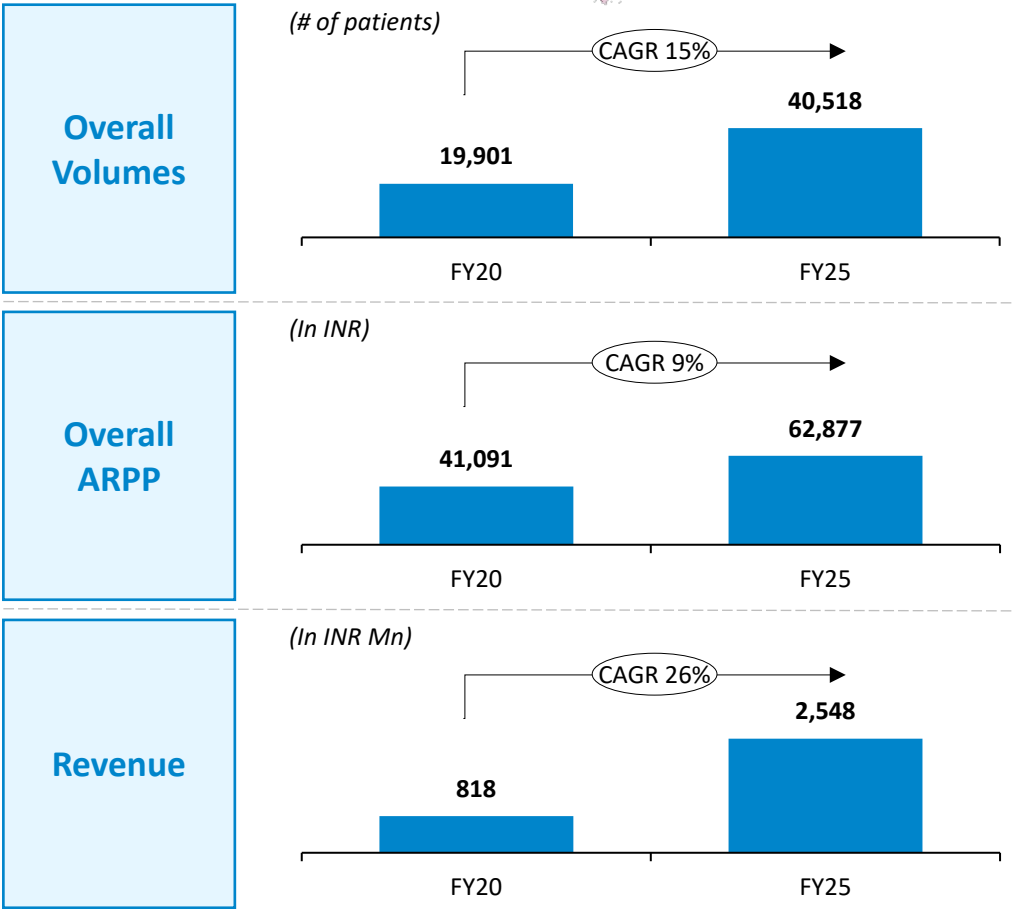
- Maintain leadership position in Ahmedabad
- Increase market share in Mumbai, Nashik and Nagpur
- Continued ramp up of high potential centres



Region-wise Business Snapshot: East



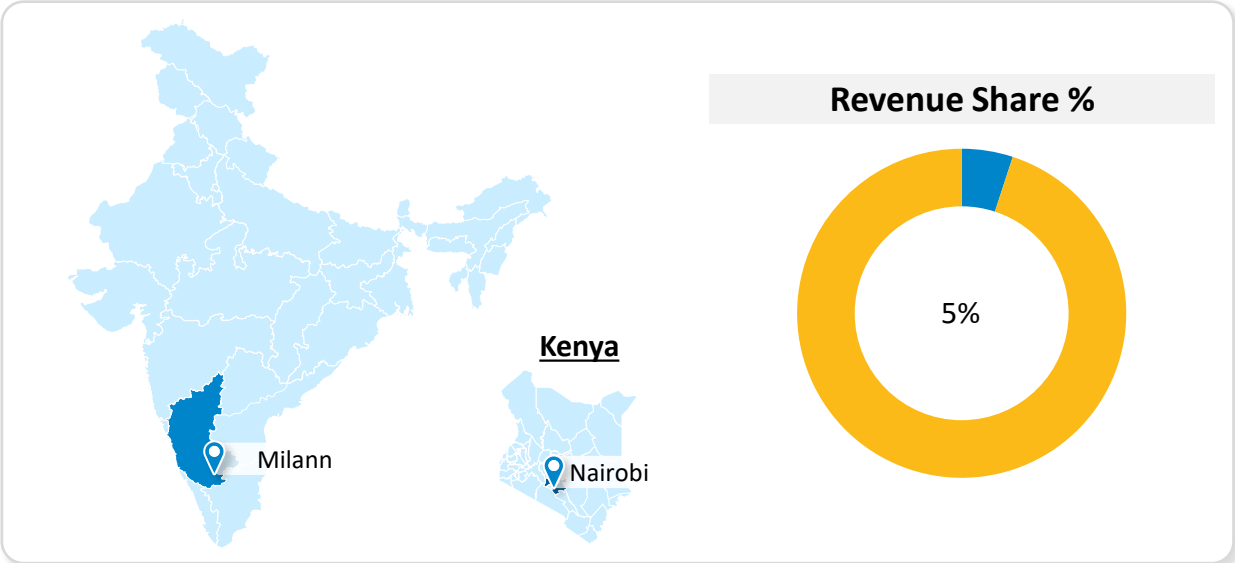
FY25








- Largest provider of cancer care in Cuttack with an emerging presence in Kolkata
- Expand capacity in attractive Cuttack market via brownfield expansion
- Continued ramp up in Kolkata

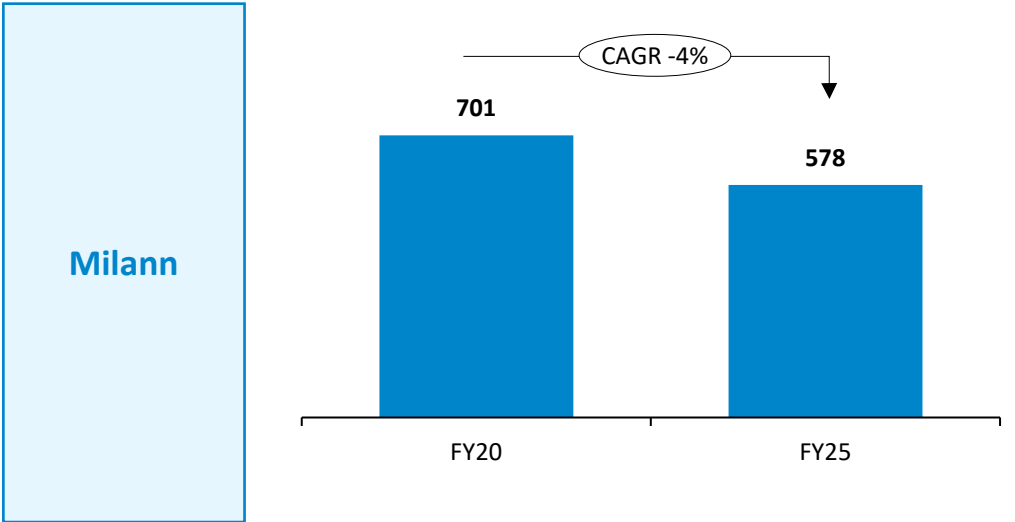
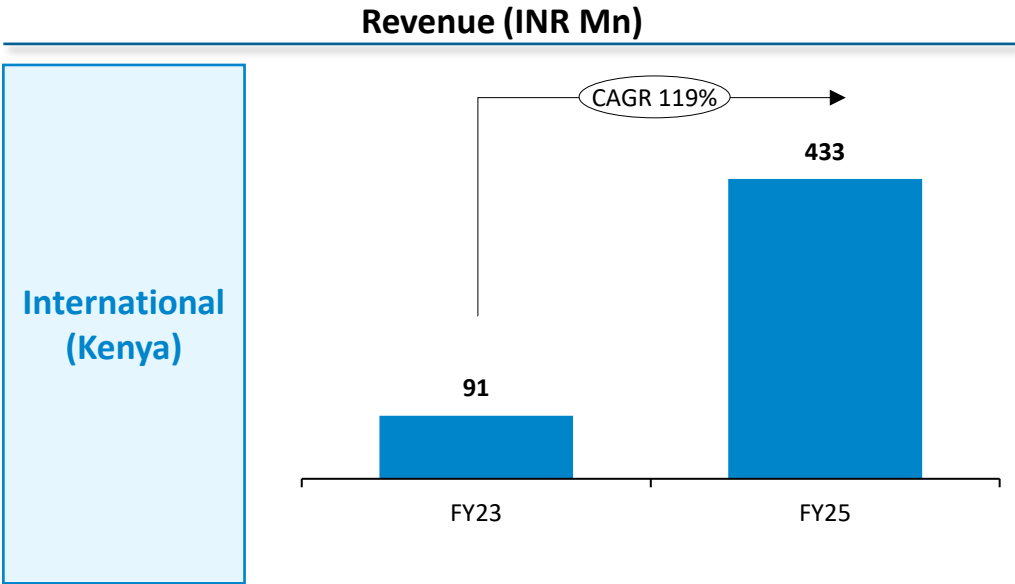


Region-wise Business Snapshot: International and Milann



FY25

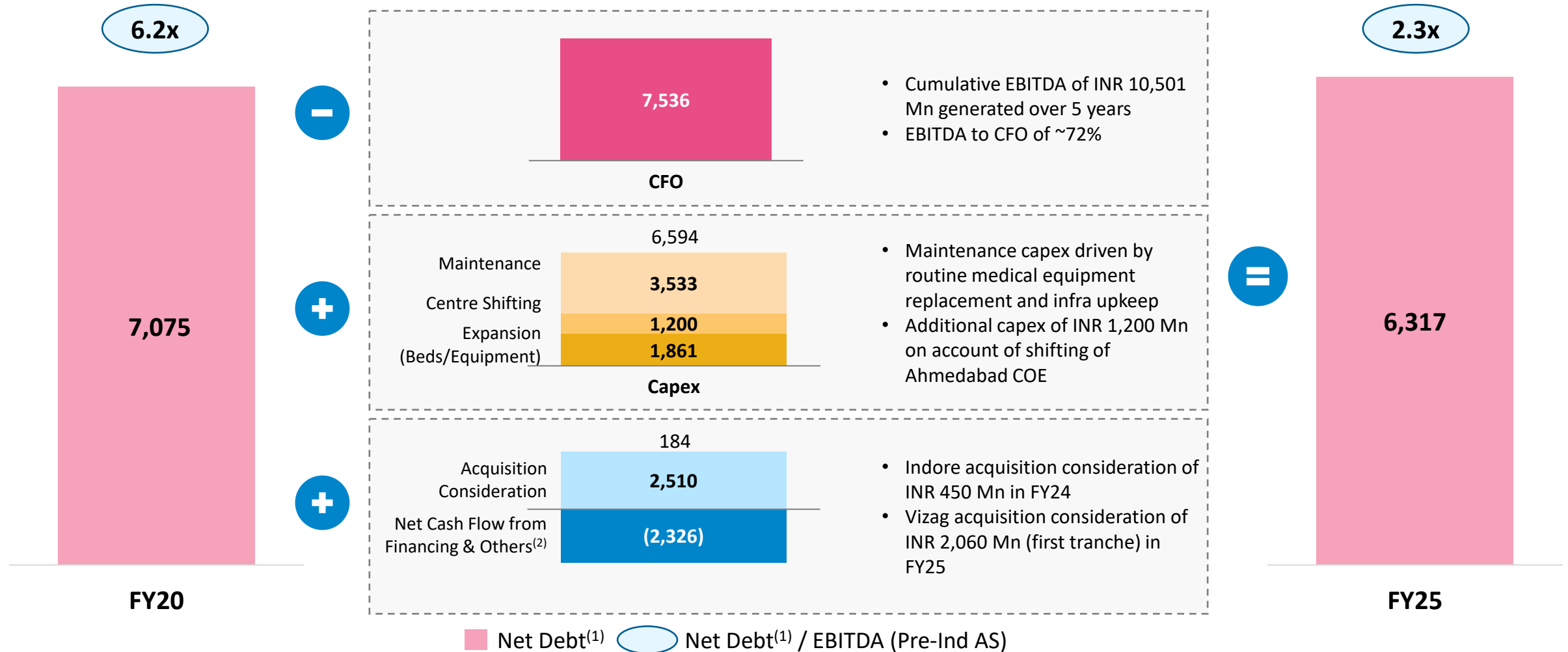
International (Kenya)	Milann
 # of LINACs 1	 # of Centres 7
 HCG CCK Cancer Centre (Nairobi, Kenya)	 Milann (Kumara Park)  Milann (JP Nagar)





Healthy Operating Cash Flow Profile with Improving Balance Sheet Position

HCG continues to demonstrate healthy cash flow from operations of 70%+; Balance sheet has de-levered from 6.2x Net Debt / EBITDA in FY20 to 2.3x in FY25 despite cash outflow on account of Indore and Vizag acquisitions



Next 5 Years Strategy and Growth Drivers



Key Pillars to Focus on Over the Next 3-5 Years

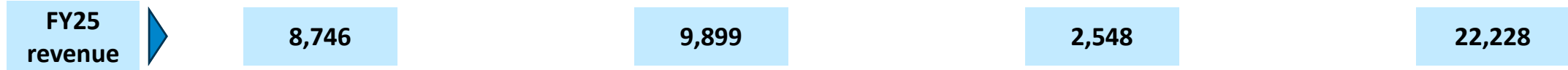


Clinical Outcomes, Growth and Profitability

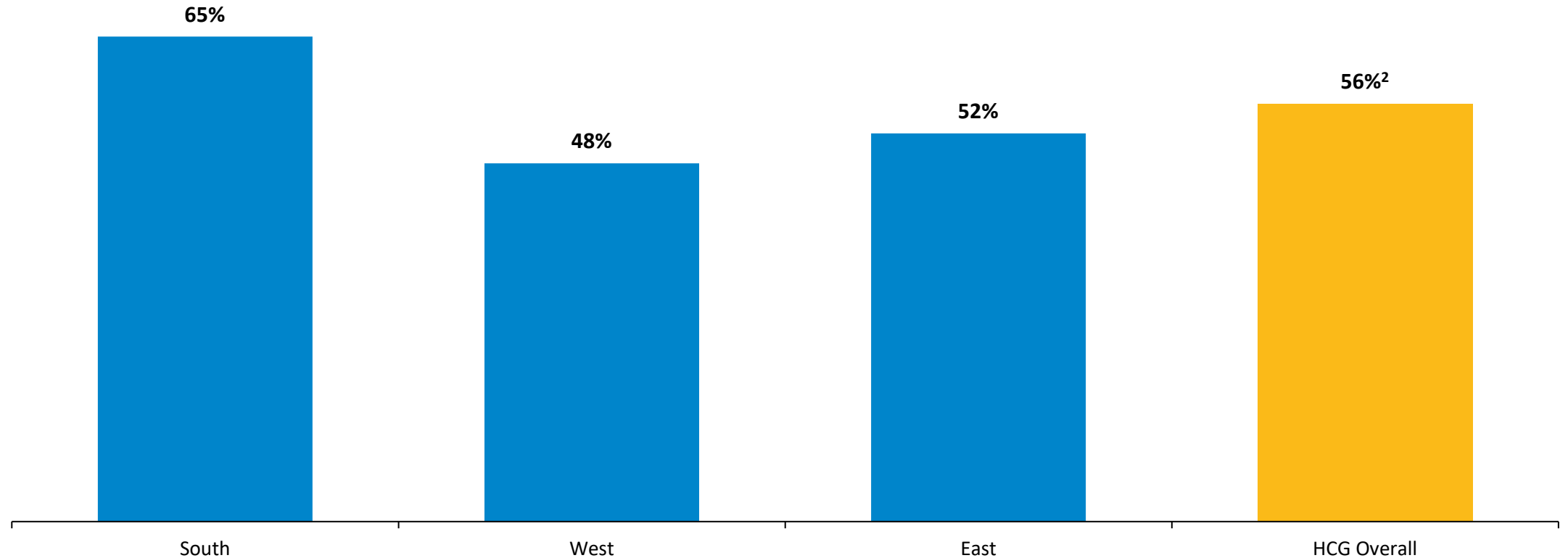
A Optimize Existing Network	B Invest in Growth	C Improve Network Efficiency	D Enhance Patient Experience
1. Build best-in-class talent → improve case mix	1. Brownfield expansion across key hospitals	1. Undertake prudent cost optimization initiatives	1. Invest in upgrading existing infrastructure
2. Focused marketing efforts to become provider of choice across payor types	2. Strengthen presence in existing markets	2. Focus on operating leverage to improve margins	2. Maintain leadership in medical technology
3. Scale up international business	3. Enter identified and attractive markets which fit the expansion framework	3. Develop asset light adjacencies – Day care, Diagnostics etc.	3. Leverage digital & tech to improve patient experience

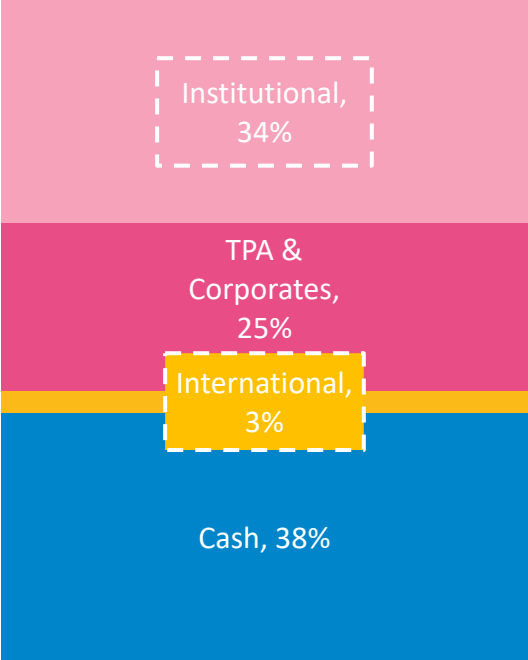
Prudent Capital Allocation

Significant runway to drive revenue growth in existing centers



FY25 Potential Revenue¹ Achieved at current ARPPs





FY25

Payor mix

Infrastructure upgrade, execution excellence & local market activation to optimize payor mix

Intl' business

- 1 Historically driven from COE- Bangalore, leveraging strong clinical and brand equity
- 2 New Leadership hire and focused S&M thrust to accelerate international business growth in Bangalore & other metros
- 3 Targeting 6-8% of revenue in focused markets in line with industry

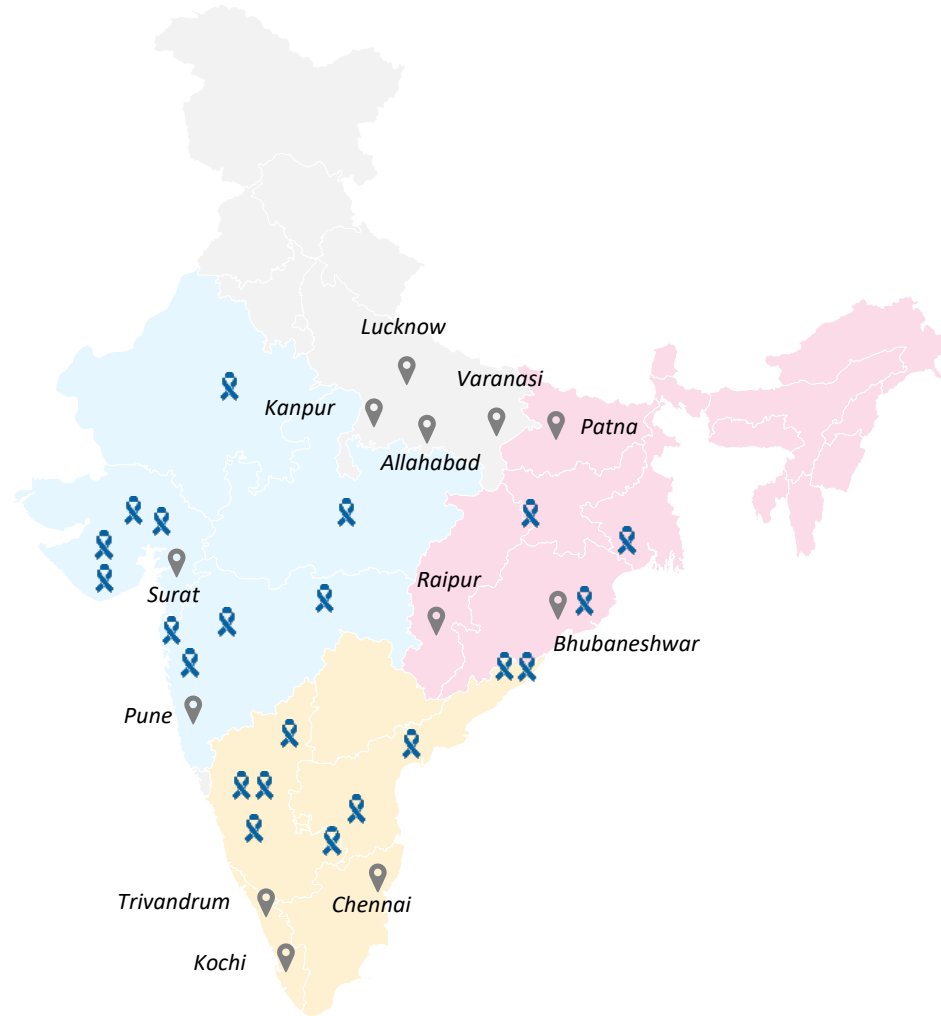
Potential to further improve realization and profitability by optimizing payor mix across centres





Expansion Plans Across Existing Centers and in Identified, High Potential Locations

1,000+ beds and 10+ LINACs to be added over the next 5 years in existing-proven and high potential markets through brownfield, greenfield and accretive acquisitions



High Potential Cities



Existing Centres of HCG

Brownfield strategy

Strengthen leadership position in COEs (Centre of Excellence) and strong performing markets

City expansion strategy

Leverage HCG's Brand to expand in high potential markets through a combination of greenfield and accretive acquisitions

- ✓ *High cancer incidence + demand-supply gap*
- ✓ *Strong right to win for HCG*
- ✓ *Discipline in achieving steady-state metrics*



Path to Improve Profitability and Return on Capital

- Centres with >INR 100Mn revenue demonstrate strong EBITDA margin profile of 25+%
- Margin uplift to come from the INR50-100Mn monthly revenue centres which are fully built out and invested ahead of time, growing at 18%+ CAGR

Revenue Per Month	FY25		# of Centres ⁴		Like-for-Like Revenue CAGR (FY20-25)
	EBITDA Margin ¹ (%)	ROCE ³ (%)	FY20	FY25	
>INR 100Mn	25% ¹	27%	1	3	14%
INR 50-100Mn	20% ¹	12%	3	11	18%
<INR 50Mn	15% ¹	(4%)	20	10	19%
Total	17% ²	13%	25	25	

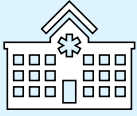
Notes: (1) Center-wise EBITDA margin is prior to corporate cost allocation (2) Consolidated EBITDA margin post corporate costs (3) ROCE calculated as EBIT (Pre-IndAs, Post corporate cost allocation basis revenue) / Average net capital employed (4) KR road and DR centers are counted as one for the revenue bucketing, but separately counted for the total



Looking ahead....



Infra & Technology expansion



Addition of ~1k beds (to reach ~3.5k beds) and **~8-10 LINACs**
Increase COE count from 1 (KR) today to 3+ across regions



Continued investments in technology and innovation
Focus on adding **high quality clinicians** to the network

Growth

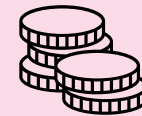


Revenue Growth above industry growth rate and our historical growth driven by new clinical programs, talent addition, international business and network expansion

Profitability



EBITDA Growth higher than historical growth rate on the back of operating leverage



Overall ROCE profile in line with our steady-state high yielding centres

Annexure

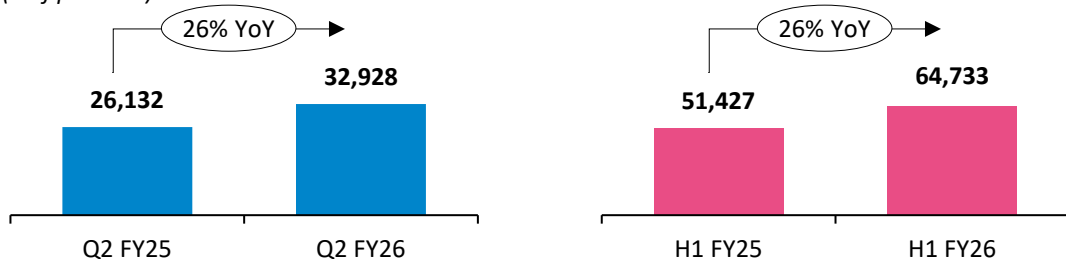


Q2 FY26 and H1 FY26 Operating Metrics (1/2)

South

Overall Volumes

(# of patients)



Overall ARPP

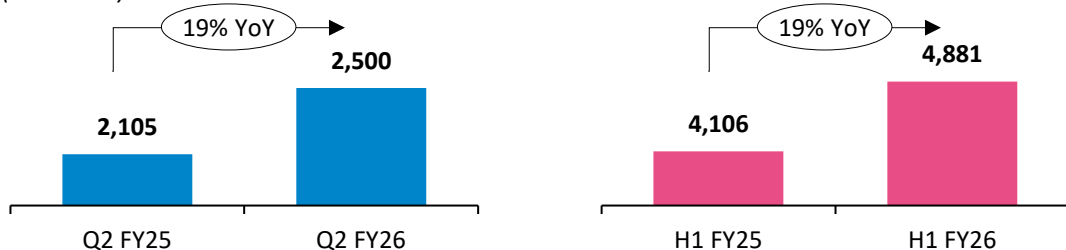
(In INR)



ARPP decline is primarily from Vizag acquisition and case mix in Suchirayu (multi-spec)

Revenue

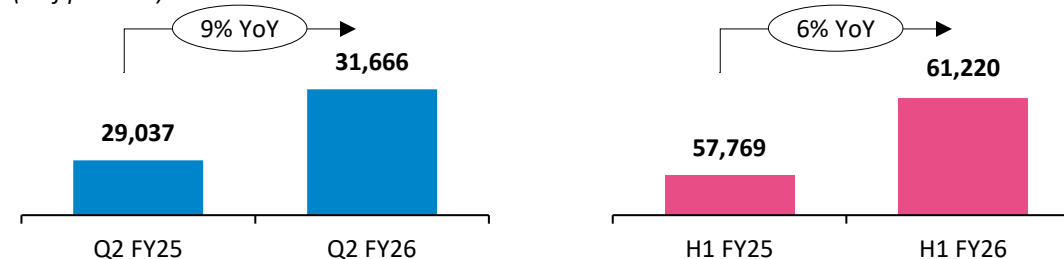
(In INR Mn)



West

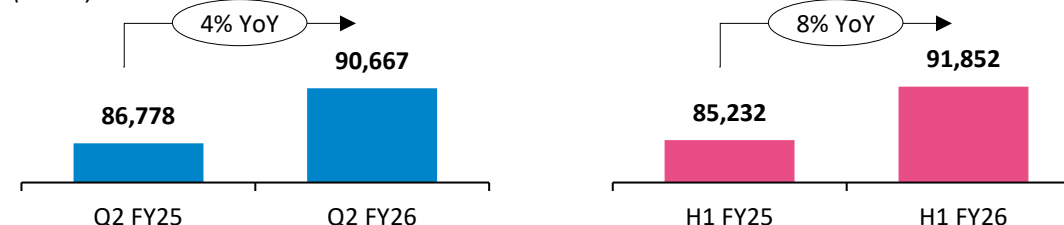
Overall Volumes

(# of patients)



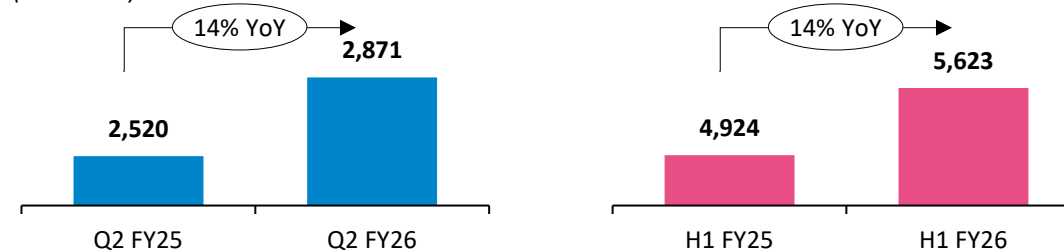
Overall ARPP

(In INR)



Revenue

(In INR Mn)



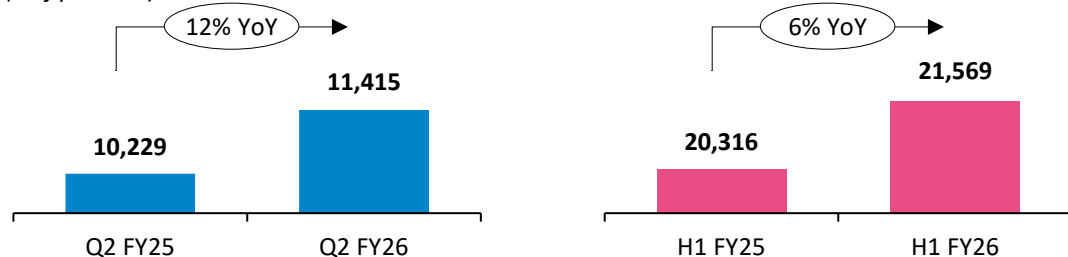


Q2 FY26 and H1 FY26 Operating Metrics (2/2)

East

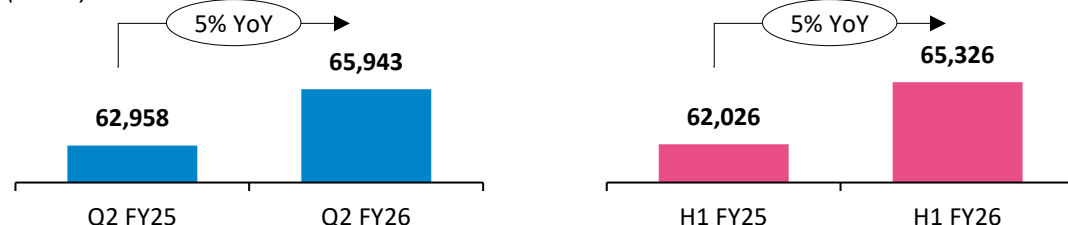
Overall Volumes

(# of patients)



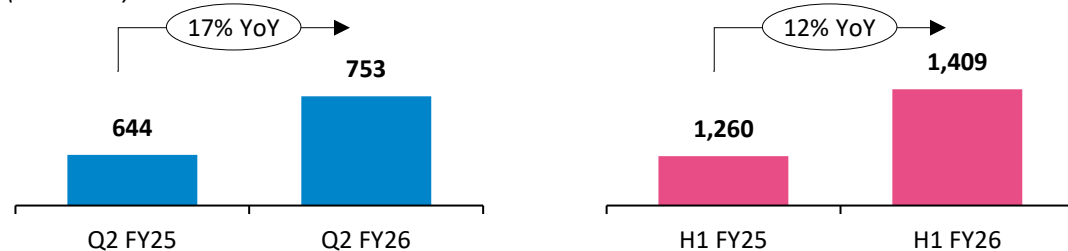
Overall ARPP

(In INR)



Revenue

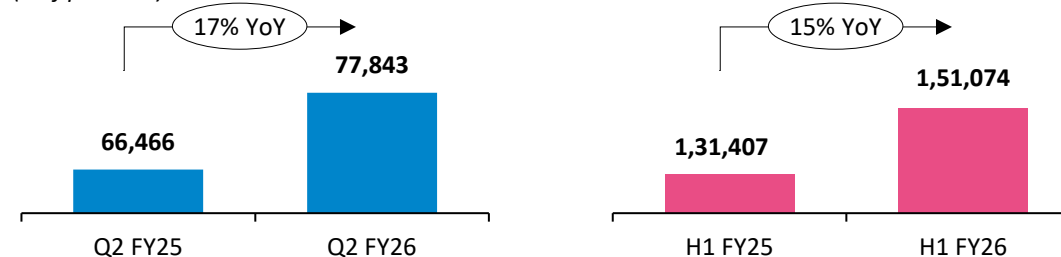
(In INR Mn)



Overall⁽¹⁾

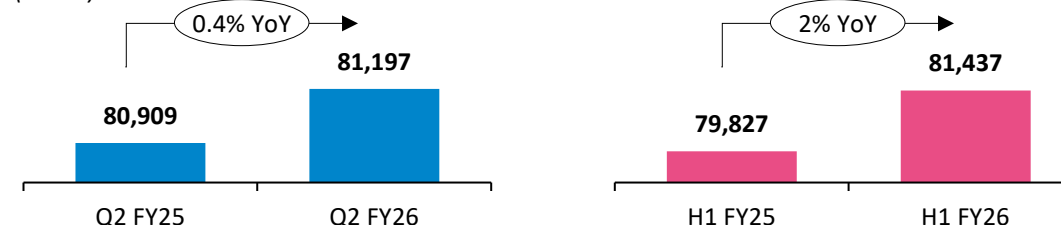
Overall Volumes

(# of patients)



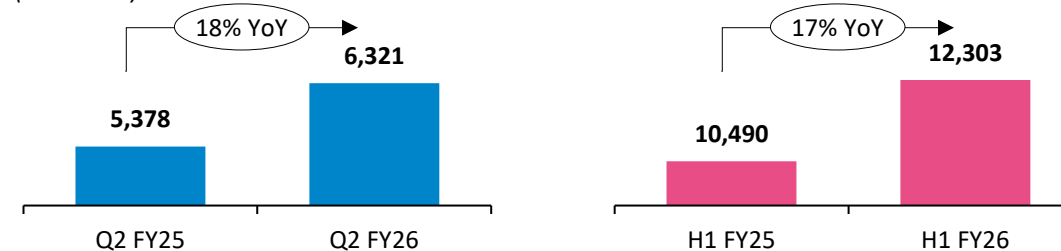
Overall ARPP

(In INR)



Revenue

(In INR Mn)





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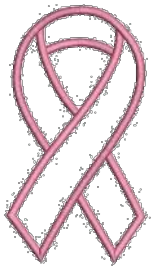
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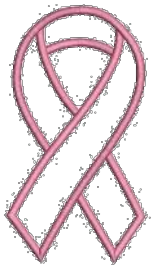
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About Us: HealthCare Global Enterprises Ltd. (HCG), headquartered in Bengaluru, is the largest provider of cancer care in India. Through its network of 25 comprehensive cancer centers across India and Africa, HCG has brought advanced cancer care to the doorstep of millions of people. HCG's comprehensive cancer centers provide expertise and advanced technologies for the effective diagnosis and treatment of cancer under one roof. Under the "Milann" brand, HCG operates 7 fertility centers.

For updates and specific queries, please visit www.hcgoncology.com or contact:

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THANK YOU



HCG Limited cordially invites you to its virtual
INVESTOR & ANALYST MEET
to share updates on the Company's business strategy
and long-term growth plans

Date: Thursday, 4th December 2025

Time: 04:00 PM onwards.

[Click here to Register](#)

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R.S.V.P

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About Healthcare Global Enterprises Limited (HCG):

HealthCare Global Enterprises Ltd. (HCG), headquartered in Bengaluru, is the largest provider of cancer care in India. Through its network of 22 comprehensive cancer centers across India and Africa, HCG has brought advanced cancer care to the doorstep of millions of people. HCG's comprehensive cancer centers provide expertise and advanced technologies for the effective diagnosis and treatment of cancer under one roof. Under the "Milann" brand, HCG operates 7 fertility centers.

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